User Guide

How to assign EPF Contribution Rates
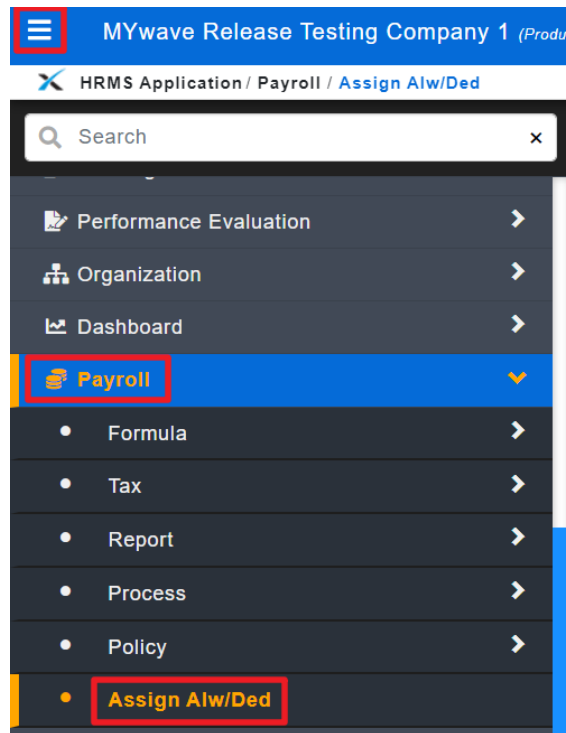
Contents

HOW TO ASSIGN EPF CONTRIBUTION RATES

<u>Method 1</u>: Assign rates through Payroll module

1. Access to Payroll **->** **Assign Alw/Ded** through Payroll module.

2. Access to "**Assignment**" [1st tab]
3. Select "EPF"
4. Select date range
5. Insert EPF rates in percentage % (e.g.: 11%)
6. Filter out employee(s) (if any)
7. Select employee(s) which applicable to the contribution rate.
8. Click "**Assign**"

Method 2: Assign Contribution Rates through API/Excel File
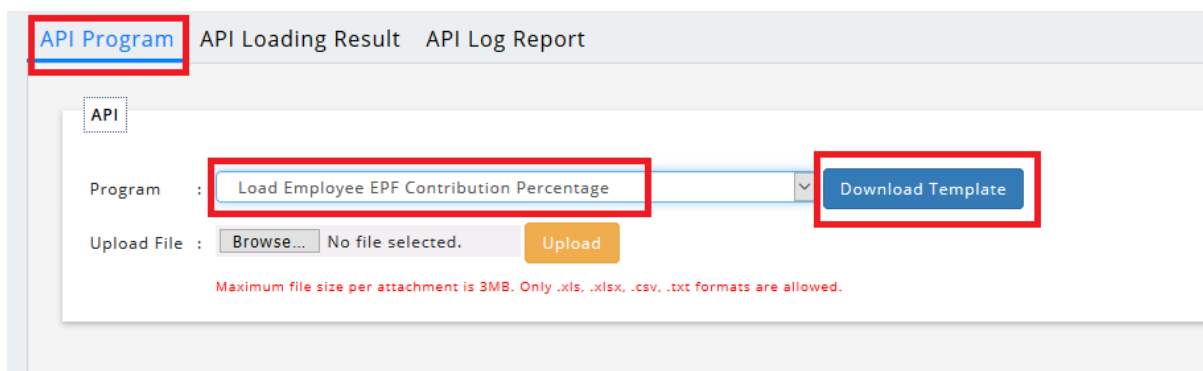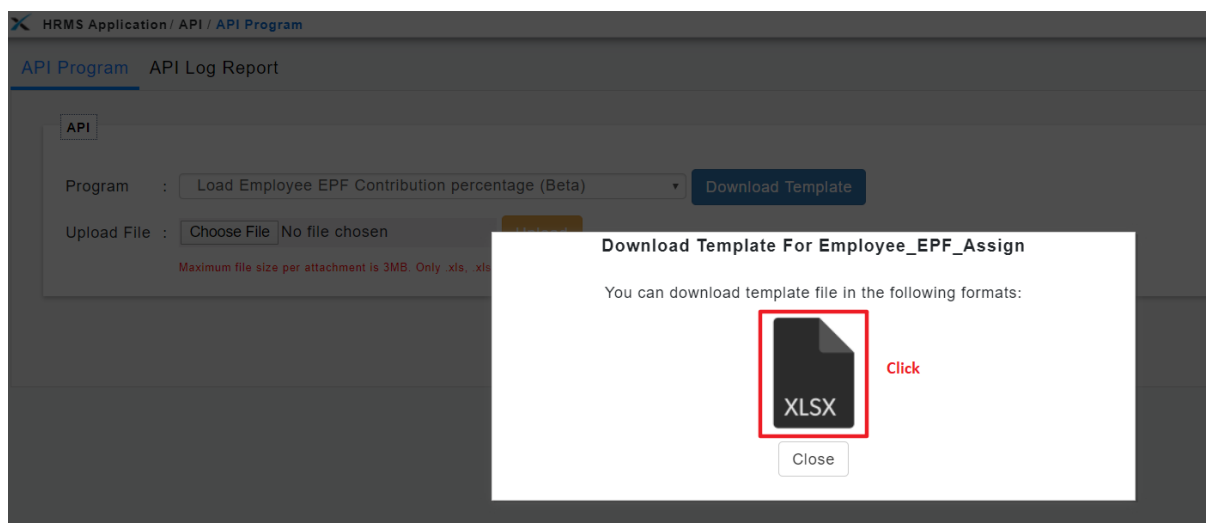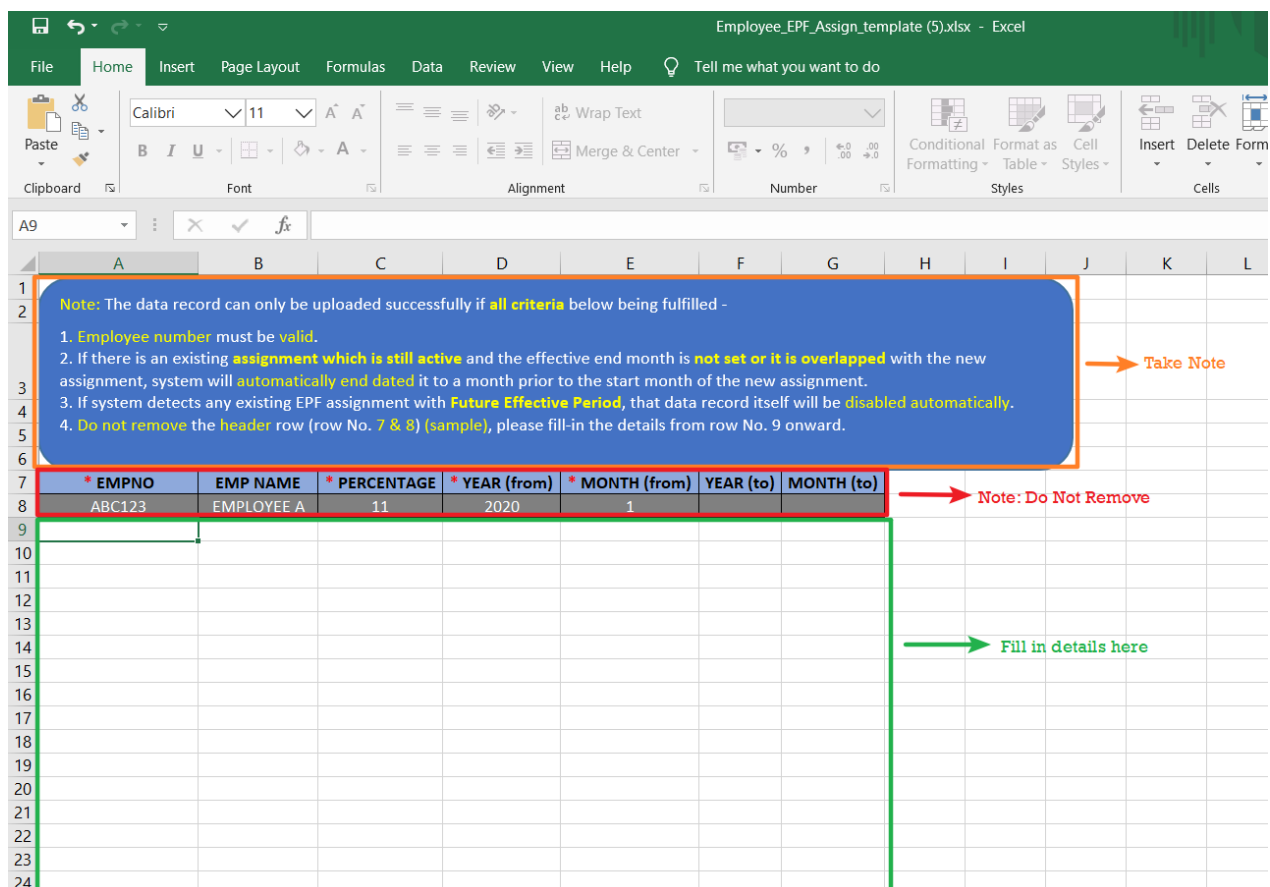1. Access to API -> **API Program** module.
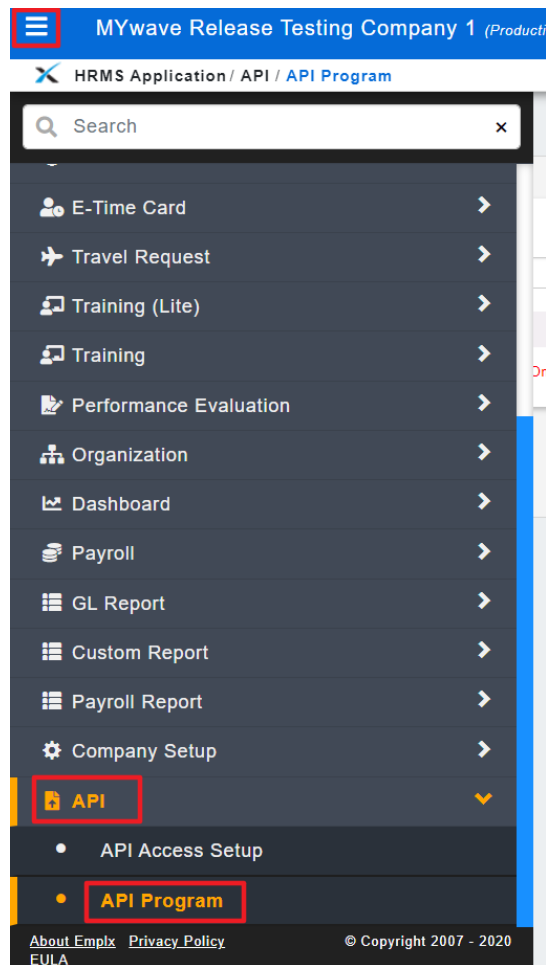
2. Access to "**API Program**" [1st tab]
3. Select Program: [**Load Employee EPF Contribution Percentage**]
4. Click "**Download Template**".

5. Click on "XLSX" to download the ".xlsx" format in excel file.

6. **Open** the Excel file and **fill in** the details.

Important Notes: The data record can only be uploaded **successfully** if all criteria **below** being **fulfilled** -

  i. Employee number must be valid.
  ii. If there is an existing **assignment which is still active** and the effective end month is **not set or it is overlapped** with the new assignment, system will automatically end dated it to a month prior to the start month of the new assignment.

E.g: <mark>Existing assignment</mark> - Start Month: 2020-01, End Month: '**blank'** *OR* Start Month: 2020-01, End Month: '**2020-09**' and *new assignment* Start Month: **2020-04**, then the **End Month** for those <mark>existing assignment</mark> will be set to **2020-03**.

iii. If system detects any existing EPF assignment with **Future Effective Period**, that data record itself will be disabled automatically.

iv. Do not remove the header row (row No. 7 & 8) (sample), please fill-in the details from row No. 9 onward.

7. "**Save**" the file after all information are filled up correctly.
8. "**Browse**" and select the "Updated excel file" **->** click "**Upload**".

9. **Verify** if the information which requires for uploading is displayed accurately.
10. Click "**Confirm**" to proceed with the file upload.

11. Processing completed message will pop-up -> click "**Close**" to view the Loading Result.
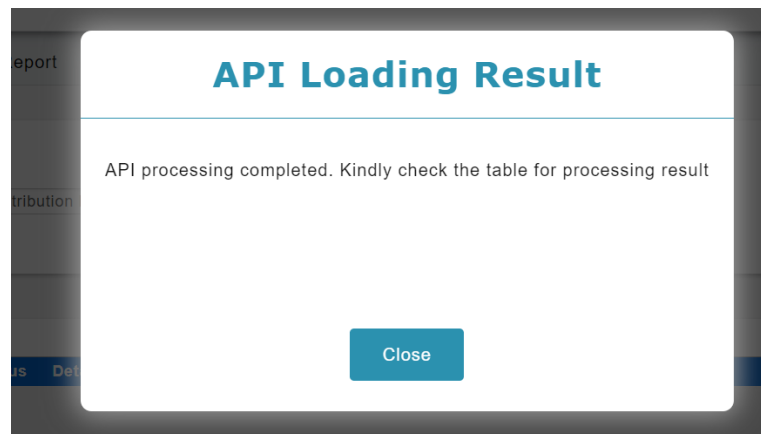
12. *If any Warning/Error detected*, kindly refer to the error message stated and do **update to the correct/valid data** in the Loading File as suggested in the Warning Message, re-upload again for those affected employee(s).

Table 1: A list of successful, potential alerts / error (data record is skipped) & proposed solutions given.

No.	Status	Potential Error	Solution Proposal
1	**Success**	Data record has successfully been uploaded	-
2	**Warning**	Missing or unable to locate particular employee	Please check if submitted Employee ID is a valid ID that exists in system or create a profile for this employee.
3	**Warning**	Employee has resigned	Please make sure submitted Employee ID is an **active employee** in system.
4	**Warning**	Missing or invalid YEAR (from) value	Please check if the inserted effective YEAR (from) is valid **(1900 - 9999 only)**.
5	**Warning**	Missing or invalid MONTH (from) value	Please check if the inserted effective MONTH (from) is valid **(1 to 12 only)**.
6	**Warning**	Missing or invalid Percentage	Please check if the inserted percentage/rate is valid **(0 to 30 only)**.
7	**Warning**	Invalid YEAR (to)	Please check if the inserted effective YEAR (to) is valid **(1900 - 9999 only)**.
8	**Warning**	Invalid MONTH (to)	Please check if the inserted effective MONTH (to) is valid **(1 to 12 only)**.
9	**Warning**	Inserted date range is earlier than the effective starting year and month	Please check if the inserted end date is valid
10	**Error**	Program error	Please contact MYwave technical support team for further assistance

Table 1

TO VERIFY THE ASSIGNED DATA RECORD(S)

1. Access to **Payroll** Module **-> Assign Alw/Ded**
2. Access to "Record" [2nd tab]
3. Select Type: [**Statutory (employee contribution)**], Transaction: [**EPF**]
4. Select the employee(s) (*if necessary*)
5. Click "**Retrieve**"
6. Verify the data record(s)

TO EDIT THE ASSIGNED RECORD(S)

1. From *Assign Alw/Ded* -> *Record* [2nd tab] -> click "**Edit**"

2. **Update** the information
3. Then click "**Save**"

1. From *Assign Alw/Ded* -> *Record* [2nd tab] -> click "**Delete**"

2. Select "OK" to confirm in removing the data record.
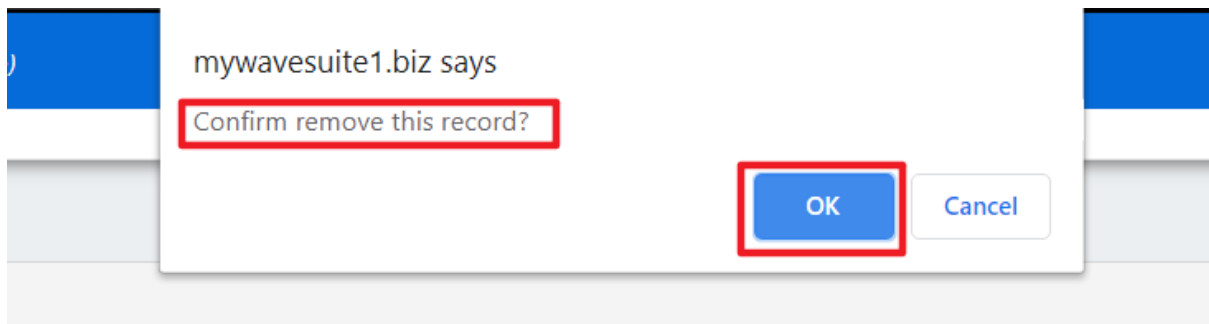
3. Verify if the record is being deleted/removed.

1. Access to Payroll -> Tax -> **Statutory Setup** module.
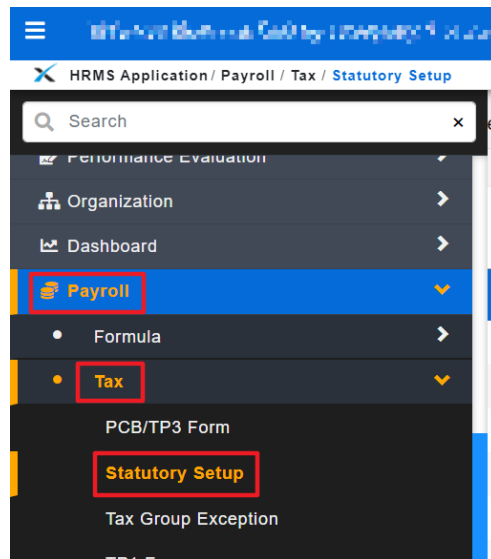
2. Click on 1st tab [**EPF Table**].
3. Select Year: [**2020-04**].
4. Identify which **salary/wages range.**
5. This is the **employee EPF contribution amount** following the respective salary/wages range and percentage (%) during the payroll processing.