

# User Guide

## Multiple EPF Setup

Admin



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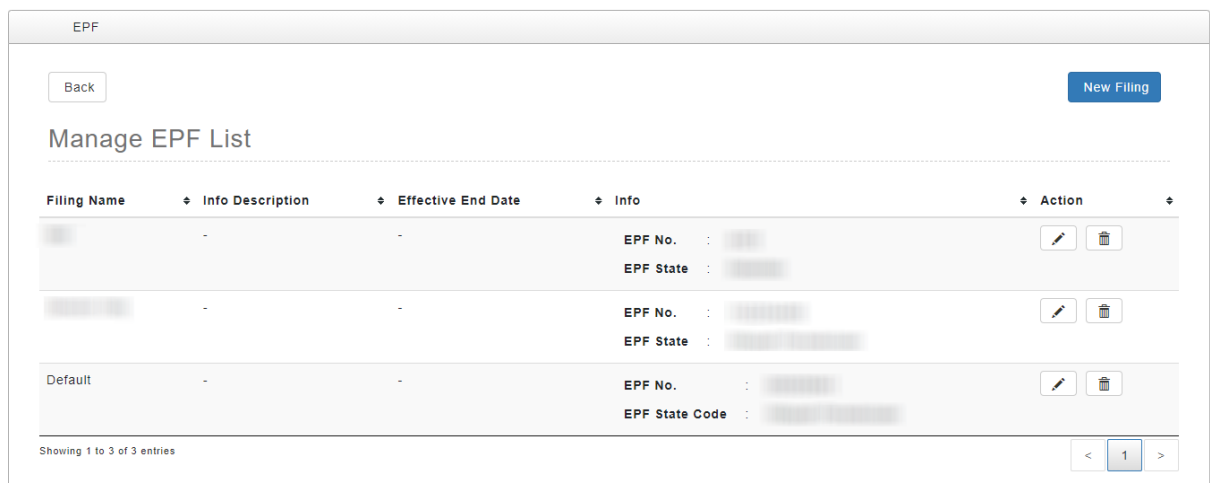
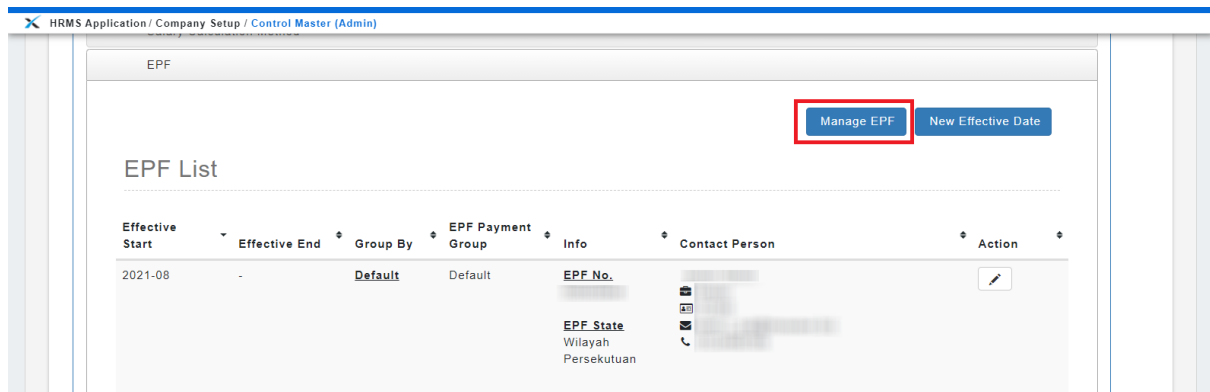
## EPF SETUP

### 1.1 Manage EPF Filing

User can add, edit or delete EPF filing under EPF Setup

#### 1.1.1 Access to Manage EPF List from EPF List

1. User can click on **Manage EPF** button on EPF List to access Manage EPF List Screen



### 1.1.2 Access to Manage EPF List Screen from Add/Edit Multiple EPF Filing

1. User can also access Manage EPF List Screen from Add/Edit Multiple EPF Filing page by clicking on [Manage EPF](#) link

EPF

Back

Save

New Effective Date

Effective Start

Effective End

2021-07

More than 1 filing?

Yes

No

Filing Name (Default)

Contact Person Name

Manage EPF

Position

EPF No








IC No.

EPF State

Email Address

Phone No.

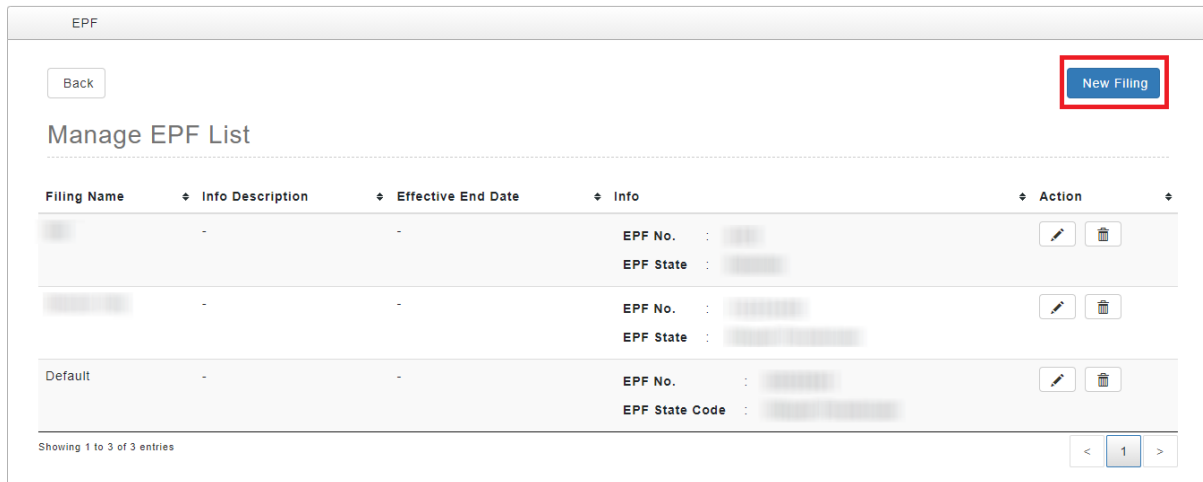
Add New Filing

Manage EPF List						
New Filing						
Filing Name	Info	Description	Effective End Date	Info	Action	
	-	-		EPF No. :		 
	-	-		EPF State :		
	-	-		EPF No. :		 
	-	-		EPF State :		
Default	-	-		EPF No. :		 
	-	-		EPF State Code :		
Showing 1 to 3 of 3 entries						 <span>1</span> 
Close						

### 1.1.3 Add New EPF Filing

Follow the steps below to add new EPF Filing to EPF list

1. Click on the **New Filing** button to open the dialog box



The screenshot shows the 'EPF' application window with a 'Manage EPF List' section. A table lists three entries. The 'New Filing' button is located in the top right corner of the window, highlighted with a red rectangle.

Filing Name	Info Description	Effective End Date	Info	Action
	-	-	EPF No. : EPF State :	
	-	-	EPF No. : EPF State :	
Default	-	-	EPF No. : EPF State Code :	

Showing 1 to 3 of 3 entries

2. Once the dialog box appears, fill up the form with required information and click on **Save** button to save the details. The EPF Filing List will be updated with new EPF Filing



The 'New Filing' dialog box is shown with the following fields and buttons:

- Filing Name \***: Text input field.
- EPF No \***: Text input field.
- State \***: Dropdown menu with a '-' selected.
- Description**: Text input field.
- Effective End Date**: Text input field with a calendar icon.
- Save**: Green button.
- Cancel**: Orange button.

### 1.1.4 Edit EPF Filing

Follow the steps below to edit existing EPF Filing on EPF List







1. Click on the  icon to open the dialog box

EPF

Back


New Filing

Manage EPF List

Filing Name	Info Description	Effective End Date	Info	Action
For Director	-	-	EPF No. : 123789 EPF State : Melaka	 
Feb2021	-	-	EPF No. : EPF State :	 
Default	-	-	EPF No. : EPF State :	 

Showing 1 to 3 of 3 entries

< 1 >

2. Once the dialog box appears, fill up the form with required information and click on  button to save the details. The EPF Filing List will be updated with new EPF Filing

Manage EPF

Filing Name 

For Director

EPF No 

123789

State 

Melaka

Description

Effective End Date



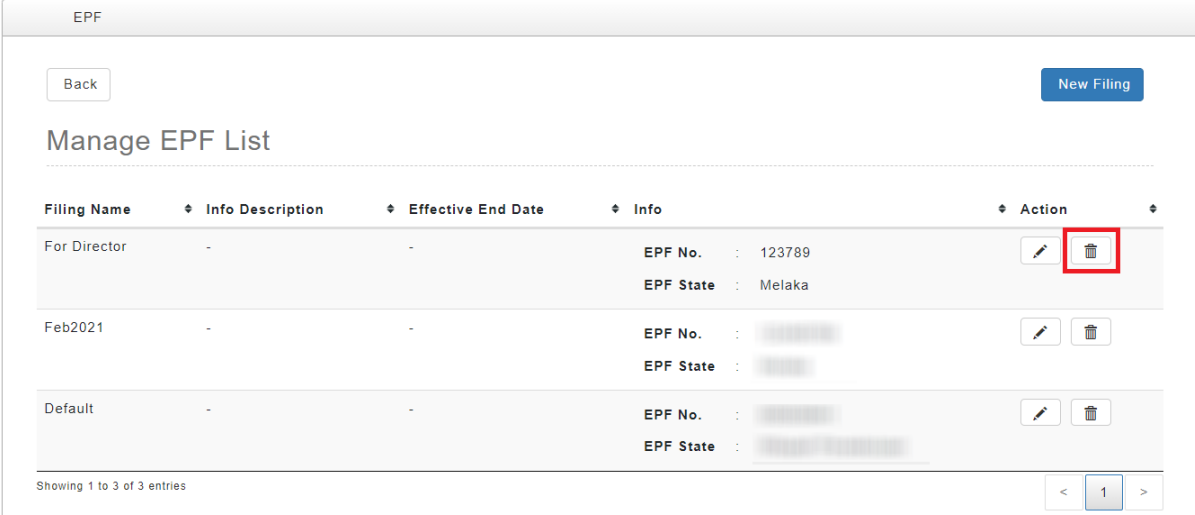
Save

Close

### 1.1.5 Delete EPF Filing

Follow the steps below to edit existing EPF Filing on EPF List







1. Click on  icon to delete existing EPF Filing item



EPF

Back New Filing

### Manage EPF List

Filing Name	Info Description	Effective End Date	Info	Action
For Director	-	-	EPF No. : 123789 EPF State : Melaka	 
Feb2021	-	-	EPF No. : EPF State :	 
Default	-	-	EPF No. : EPF State :	 

Showing 1 to 3 of 3 entries

< 1 >

2. Once the dialog box appears, click  button to confirm deletion

## Confirmation

Are you sure you want to delete this record

Yes

No

*\* EPF Filing that is in use cannot be deleted*

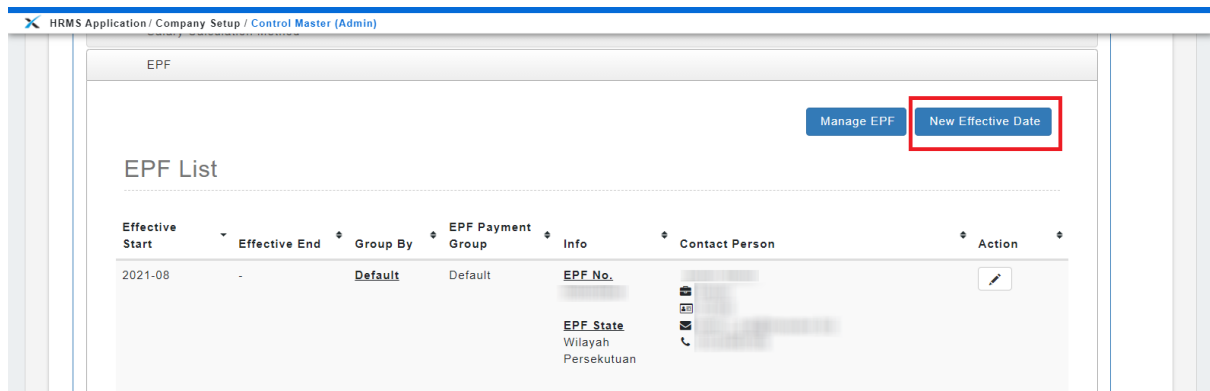
## 1.2 EPF List

Users can add one or more EPF Filing to EPF List

### 1.2.1 Add New Effective Date of Multiple EPF Filing

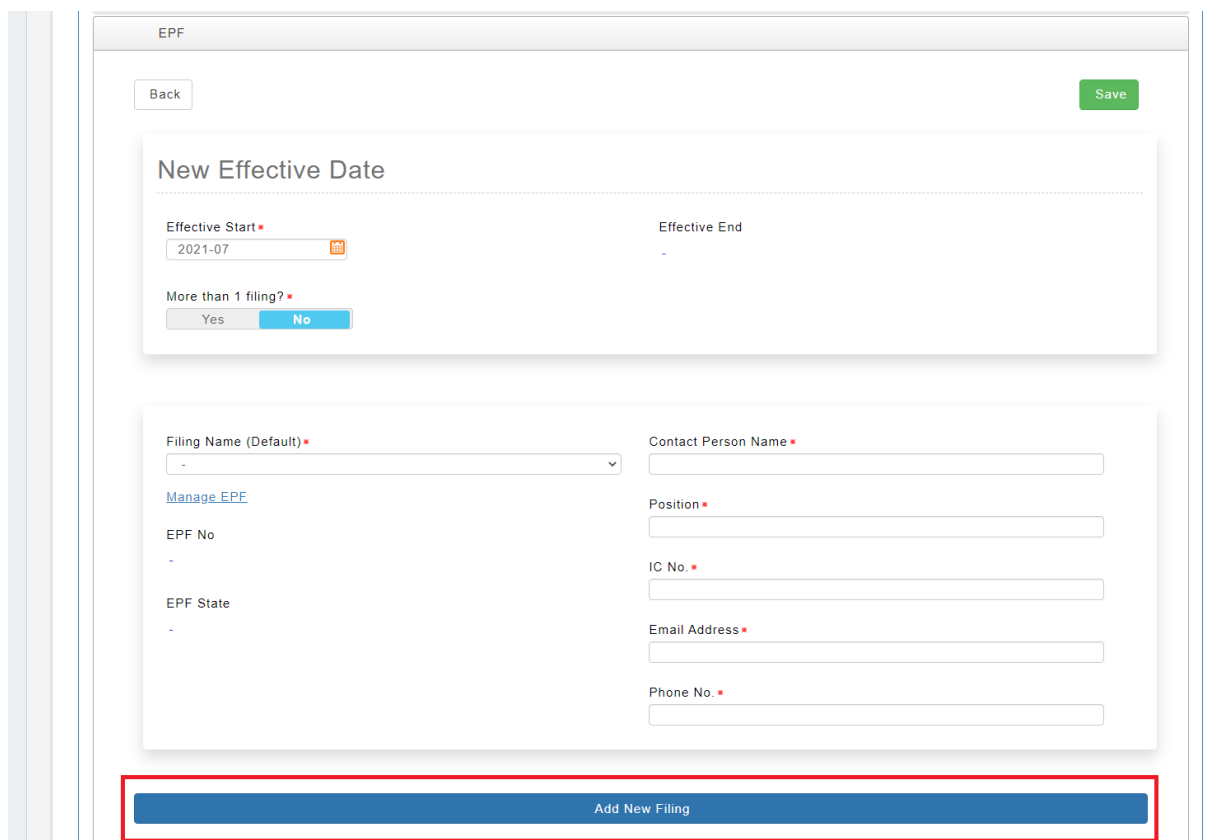
Follow the steps below to add new effective date of EPF Filing

1. Click on the **New Effective Date** button to add new multiple EPF Filing



The screenshot shows the 'EPF List' interface. At the top right, there are two buttons: 'Manage EPF' and 'New Effective Date'. The 'New Effective Date' button is highlighted with a red rectangular box. Below the buttons, there is a table with columns: Effective Start, Effective End, Group By, EPF Payment Group, Info, Contact Person, and Action. The first row of the table shows '2021-08' for Effective Start, '-' for Effective End, 'Default' for Group By, 'Default' for EPF Payment Group, and 'EPF No.' for Info. The 'Contact Person' column shows a blurred image of a person. The 'Action' column has a pencil icon.

2. Enter required information to add default EPF Filing to EPF List
3. Click on **Add New Filing** button to add new field for EPF Filing



The screenshot shows the 'New Effective Date' form. At the top left is a 'Back' button and at the top right is a 'Save' button. The form has two main sections. The first section is titled 'New Effective Date' and contains fields for 'Effective Start' (with a date picker showing '2021-07') and 'Effective End' (with a date picker showing '-'). Below these fields is a toggle for 'More than 1 filing?' with 'Yes' and 'No' options. The second section contains fields for 'Filing Name (Default)' (a dropdown menu), 'Contact Person Name', 'Position', 'IC No.', 'Email Address', and 'Phone No.'. At the bottom of the form, there is a blue button labeled 'Add New Filing', which is highlighted with a red rectangular box.



4. Select **Yes** on the slider if more than 1 EPF Filing is required, then a **Group By** drop down list will appear as highlighted below

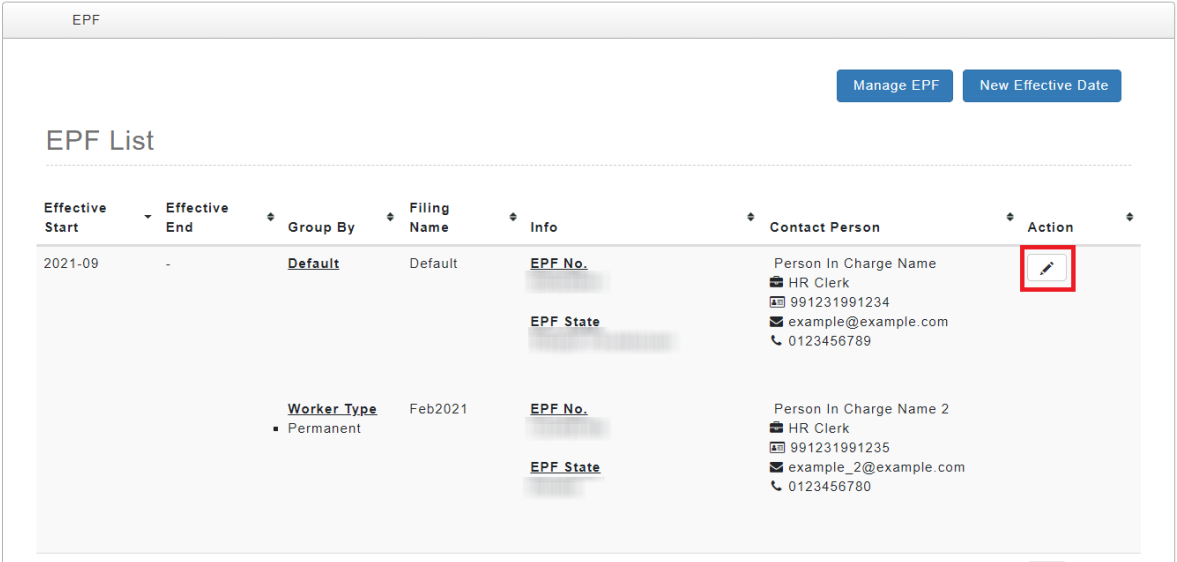
The screenshot displays the 'EPF' Filing Form. At the top, there are 'Back' and 'Save' buttons. The 'New Effective Date' section includes 'Effective Start' (2021-07), 'Effective End' (blank), and a 'More than 1 filing?' toggle set to 'Yes'. A red box highlights the 'Group By' dropdown menu, which currently shows 'Worker Type'. Below this, the form is divided into two columns. The left column contains 'Filing Name (Default)' (dropdown), 'EPF No' (text), and 'EPF State' (text). The right column contains 'Contact Person Name' (text), 'Position' (text), 'IC No.' (text), 'Email Address' (text), and 'Phone No.' (text). A 'Manage EPF' link is located below the 'Filing Name' dropdown. At the bottom, there is a blue 'Add New Filing' button.

5. Select the desired **Group By** option then select filter to be applied to the grouping
6. Fill up the remaining information and click on **Save** button to save changes. EPF List will be updated with latest EPF Filing information

## 1.2.2 Edit Grouping of Multiple EPF Filing

Follow the steps below to change Group By option of Multiple EPF Filing


1. Click on the  icon to edit



EPF

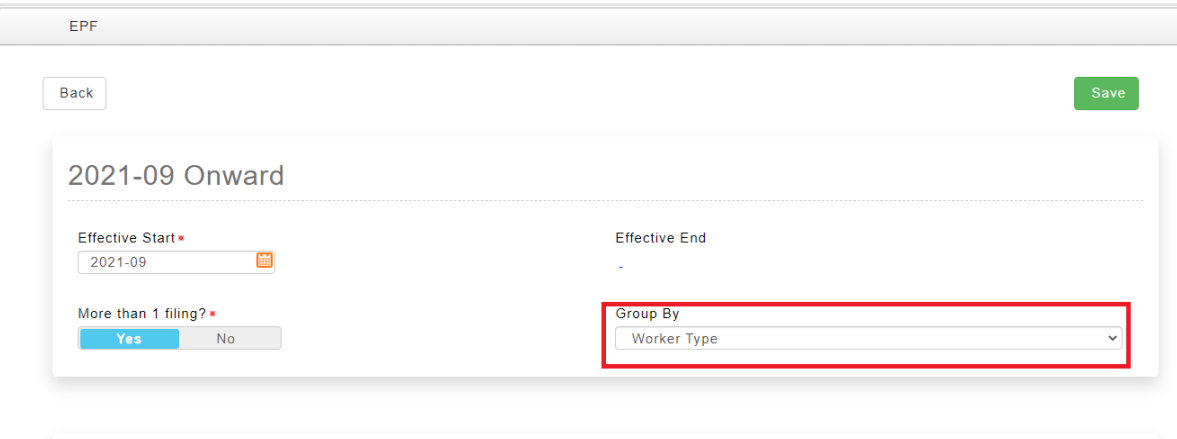
Manage EPF New Effective Date

### EPF List

Effective Start	Effective End	Group By	Filing Name	Info	Contact Person	Action
2021-09	-	Default	Default	EPF No. EPF State	Person In Charge Name HR Clerk 991231991234 example@example.com 0123456789	
		Worker Type Permanent	Feb2021	EPF No. EPF State	Person In Charge Name 2 HR Clerk 991231991235 example_2@example.com 0123456780	

2021-08 2021-08 Default Default EPF No. Tester Name

2. Select different grouping on **Group By** option as highlighted below



EPF


Back Save

### 2021-09 Onward

Effective Start 2021-09 Effective End

More than 1 filing? Yes No

Group By Worker Type

3. A dialog box will appear and prompt user for confirmation. Click on  button to proceed with the changes

## Confirmation

All selected option of **Worker Type** will be reset with the change on the assignment method. Confirm to proceed?

Yes

No

- The grouping will be updated in Multiple EPF Filing form. Select the desired filters then click on **Save** button to save the changes. EPF List will be updated with latest EPF Filing information


Filing Name ▾  
Feb2021  
[Manage EPF](#)  
EPF No  
123456789  
EPF State  
12345  
Department

Not default filing will be group by option(s) above

Contact Person Name ▾  
Person In Charge Name 2  
Position ▾  
HR Clerk  
IC No. ▾  
991231991235  
Email Address ▾  
example\_2@example.com  
Phone No. ▾  
0123456780

### 1.2.3 Remove Multiple EPF Filing option

Admin may remove Multiple EPF Filing and revert back to single EPF Filing for EPF List. Follow the steps below to remove Multiple EPF filing option.

1. Click on the  icon to edit
2. Select **No** on the slider. The Group By drop down list will be hidden.

### 2021-09 Onward

Effective Start \*  
2021-09 

Effective End  
-

More than 1 filing? \*

Yes

**No**

3. A dialog box will appear and prompt user for confirmation. Click on **Yes** button to proceed with the changes

## Confirmation

Confirm remove multi filing?

Yes


No

4. Click on the **Save** button to save the changes. Multiple EPF Filing will be removed from the EPF List

Manage EPF

New Effective Date

### EPF List

Effective Start	Effective End	Group By	Filing Name	Info	Contact Person	Action
2021-09	-	Default	Default	<div>EPF No. [REDACTED]</div> <div>EPF State [REDACTED]</div>	<div>Person In Charge Name HR Clerk 991231991234 example@example.com 0123456789</div>	

## PAYROLL SUBMISSION REPORT

### 1.3.1 Payroll Submission Report (EPF Type)

Admin is able to retrieve different types of Payroll Submission Report. If the selected submission report is EPF Type, EPF Filing option can be selected from the drop down list based on EPF Filing defined in EPF setup

Payroll submission report for EPF type will have an option for EPF Filing list that had been setup in Control Master EPF Setup.

*\*Must have at least one EPF filing currently in use*

1. Select EPF Submission Report Type
2. Select EPF Filing option from drop down list

The screenshot shows a form for generating a Payroll Submission Report. The 'Report Type' is set to 'EPF - EPF Borang A'. The 'Pay Period' is '2021-06'. There is a checked 'End' button. The 'Date As At' is '2021-06-30'. The 'EPF Filing' dropdown is highlighted with a red box and set to 'Default (Default)'. Other fields include 'Department', 'Job Class', 'Job Level', 'Worker Type', 'Employee Status', and 'Employee No.' (set to '101 selected').

3. EPF Information will be automatically inserted into Information section

The screenshot shows the 'Information' section of the form. Fields include 'Payment Mode' (Wang Tunai), 'Contribution month' (0721), 'Print Date' (26/07/2021), 'Signature Date' (26/07/2021), 'EPF' (005939941), and 'EPF State' (14-Wilayah Persekutu), which are highlighted with a red box. Other fields include 'Contact Name', 'IC No.', 'Position' (HR Generalist), 'Phone No.', and 'E-mail Address'.

## TEXT FILE

### 1.4.1 Text File (EPF Type)

Admin is able to generate EPF Text File. If the selected text file is EPF Type, EPF Filing option can be selected from the drop down list based on EPF Filing defined in EPF setup.

*\*Must have at least one EPF filing currently in use*

1. Select EPF Filing option from the drop down list

Pay Period : 2021-07

Text File : CIMB - EPF (BizChannel): 1st Payment | (Payroll BizChannel EPF (1st Payment) text File format for CIMB)

Crediting Date (YYYYMMDD) :

EPF Filing : Default (Default)

**All Departments**

**All Employees**

Generate

2. Click on **Generate** button to generate the text file based on selected EPF Filing option