User Guide
Multiple EPF Setup
Admin

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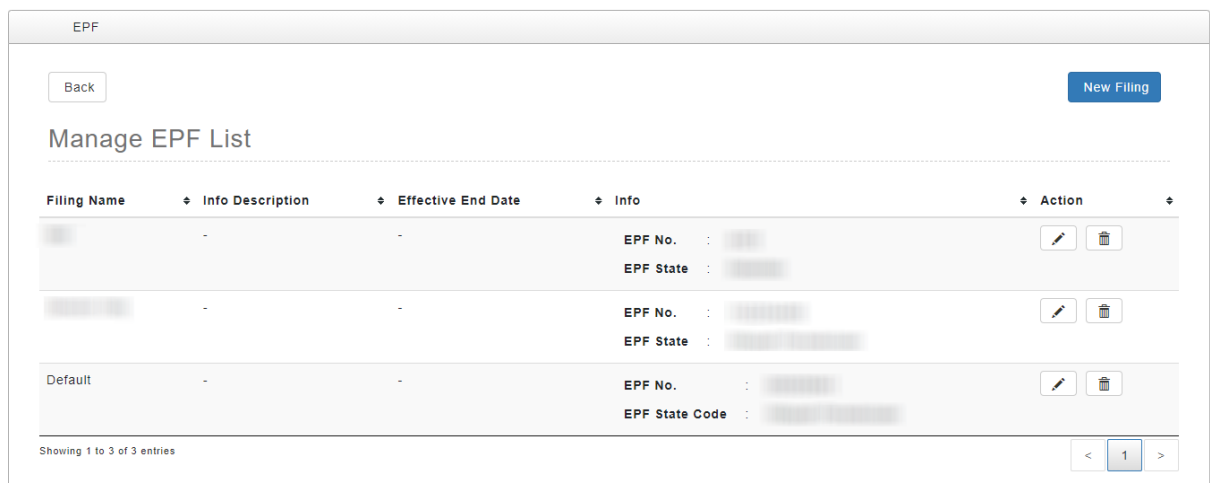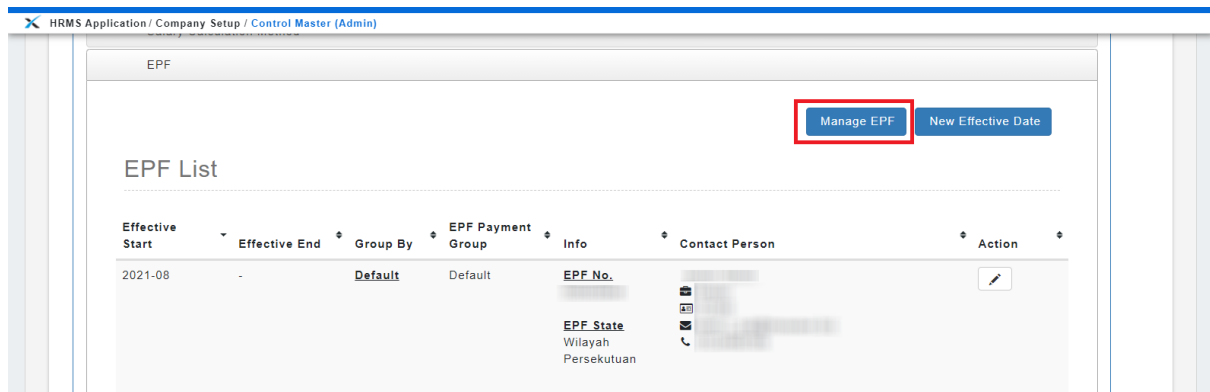**EPF SETUP**

1.1 Manage EPF Filing

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

1.1.1 Access to Manage EFP 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

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

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

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

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

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

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 >

EPF

Back   New Filing

Manage EPF List

2. Once the dialog box appears, click **Yes** 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

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

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
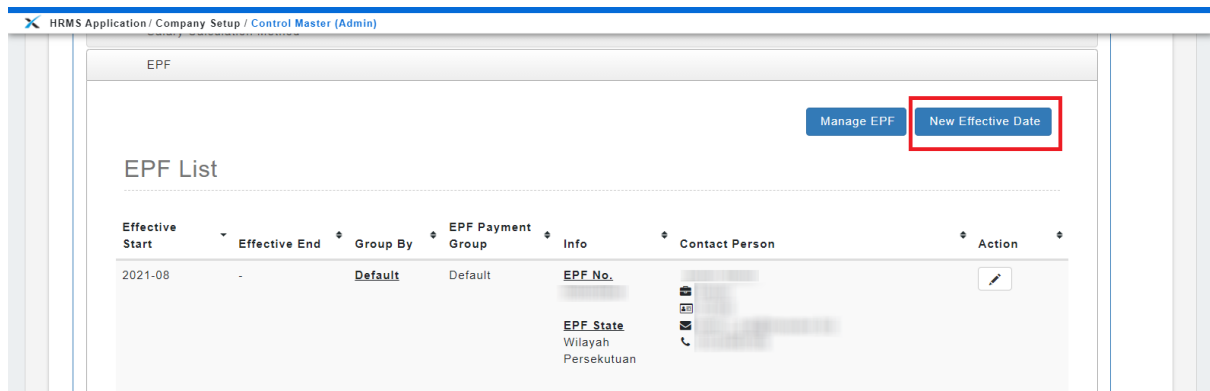

5. Select the desired **Group By** option then select filter to be applied to the grouping
6. Fill up the remaining information and click on [Save] button to save changes. EPF List will be updated with latest EPF Filing information

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

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

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

Confirmation

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

Yes   **No**

4. 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

EPF State

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.

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

4. Click on the [Save] button to save the changes. Multiple EPF Filing will be removed from the 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	[✏️]

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 Filling 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

3. EPF Information will be automatically inserted into Information section

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

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