

# User Guide

## Multiple Statutory Filing Setup

Admin



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## STATUTORY FILING SETUP

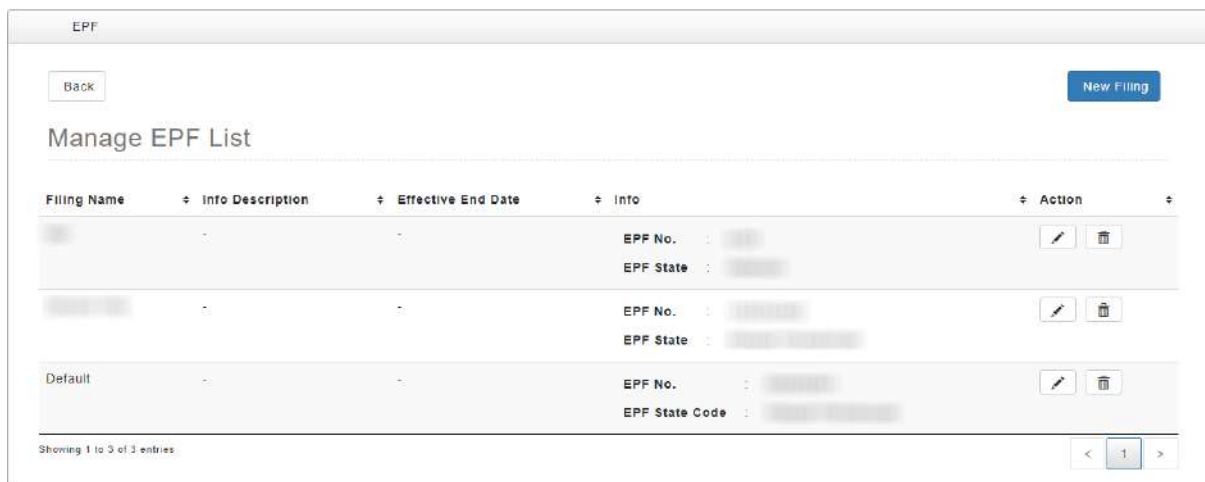
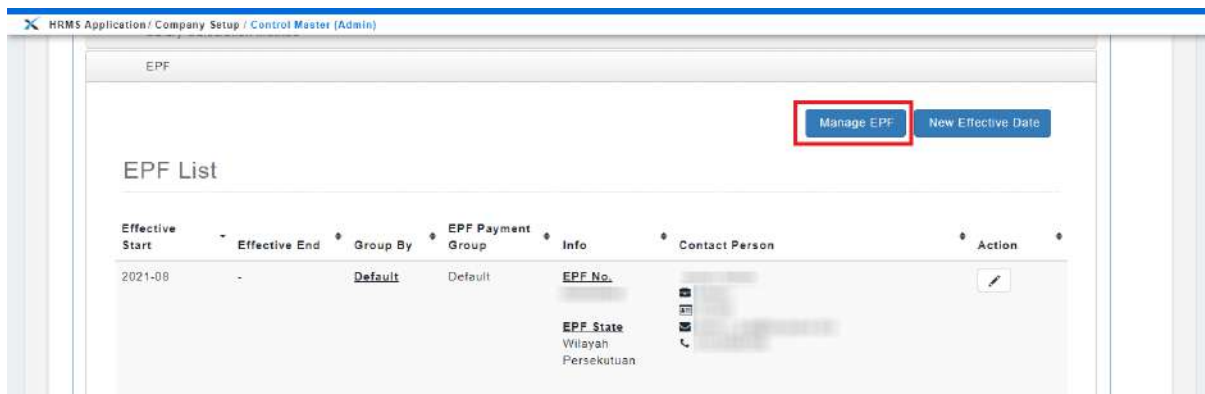
Multiple Filing has been added to EPF, LHDN, SOCSCO/EIS, PTPTN, Tabung Haji, Zakat and Amanah Saham Setup. User can setup multiple filing for the respective statutory types by following the steps below.

### 1.1 Manage Statutory Filing

User can add, edit or delete statutory filing under respective statutory setup

#### 1.1.1 Access to Manage Statutory List from Statutory List

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



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

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

EPF

Back Save

### New Effective Date

Effective Start \* 2021-07 Effective End \*

More than 1 filing? \* Yes No

Filing Name (Default) \* Contact Person Name \*

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 :	

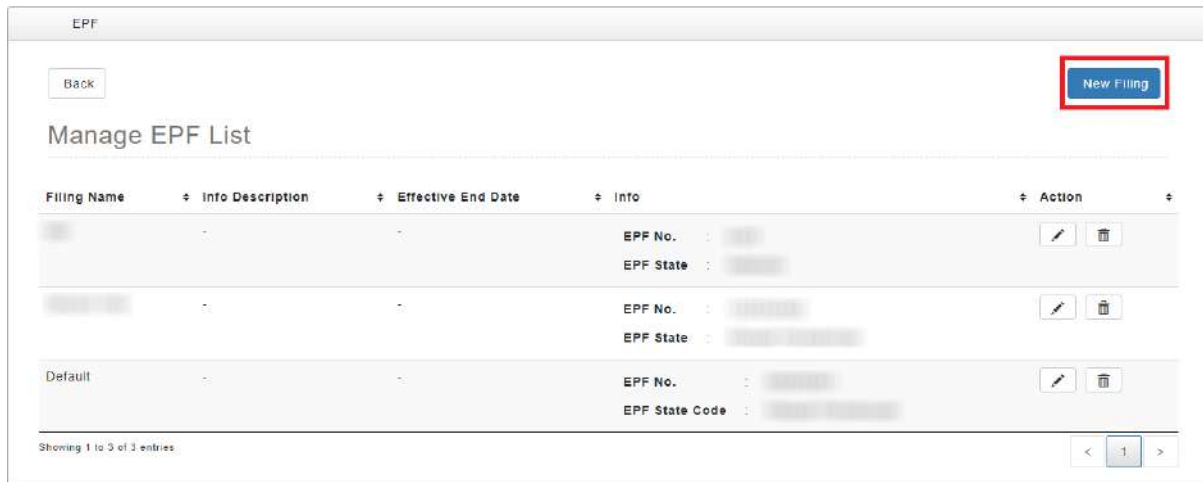
Showing 1 to 3 of 3 entries

Close

### 1.1.3 Add New Statutory Filing

Follow the steps below to add new Statutory Filing to Statutory 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 Statutory Filing List will be updated with new Statutory Filing

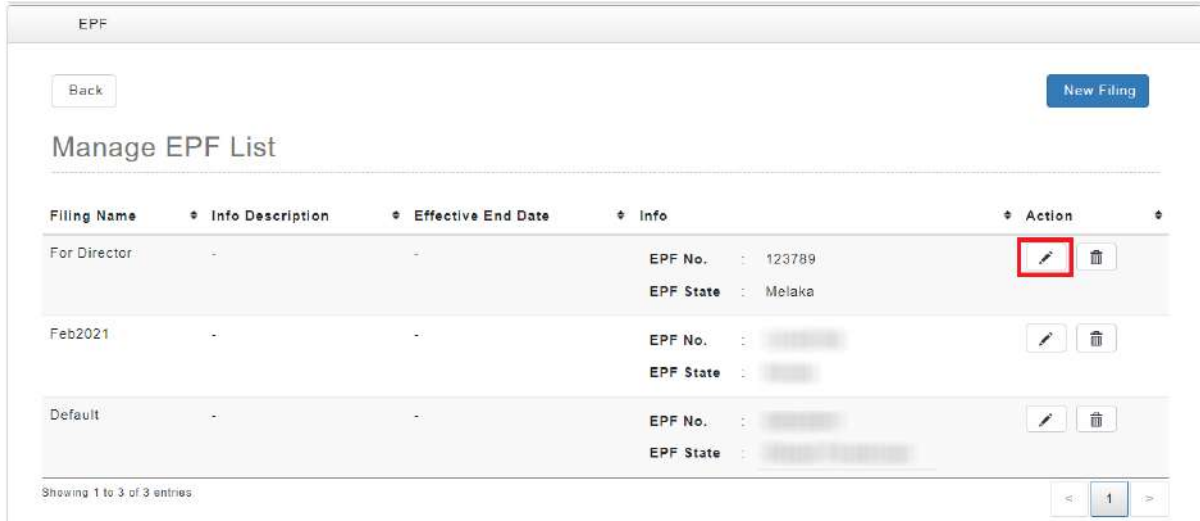


*\* The fields in this form will be shown according to the respective statutory types*

### 1.1.4 Edit Statutory Filing

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







1. Click on the  icon to open the dialog box



EPF


Back New Filing

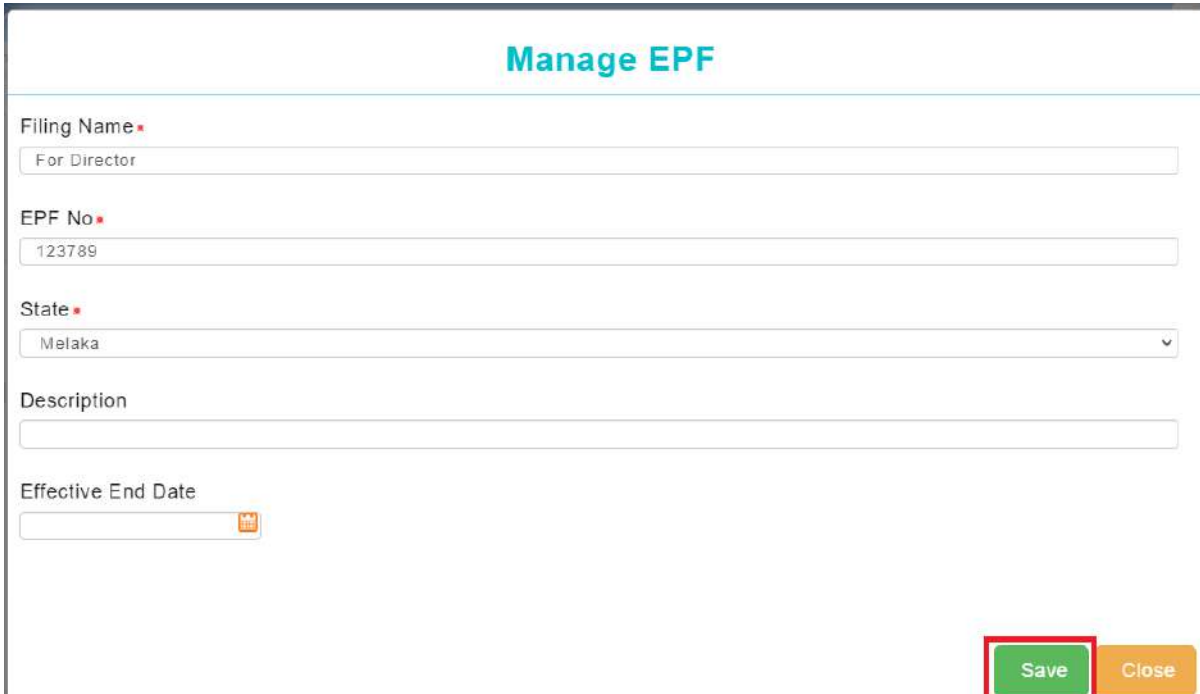
### Manage EPF List

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 Statutory Filing List will be updated with new Statutory Filing



### Manage EPF

Filing Name \*

For Director

EPF No. \*


123789

State \*

Melaka

Description

Effective End Date




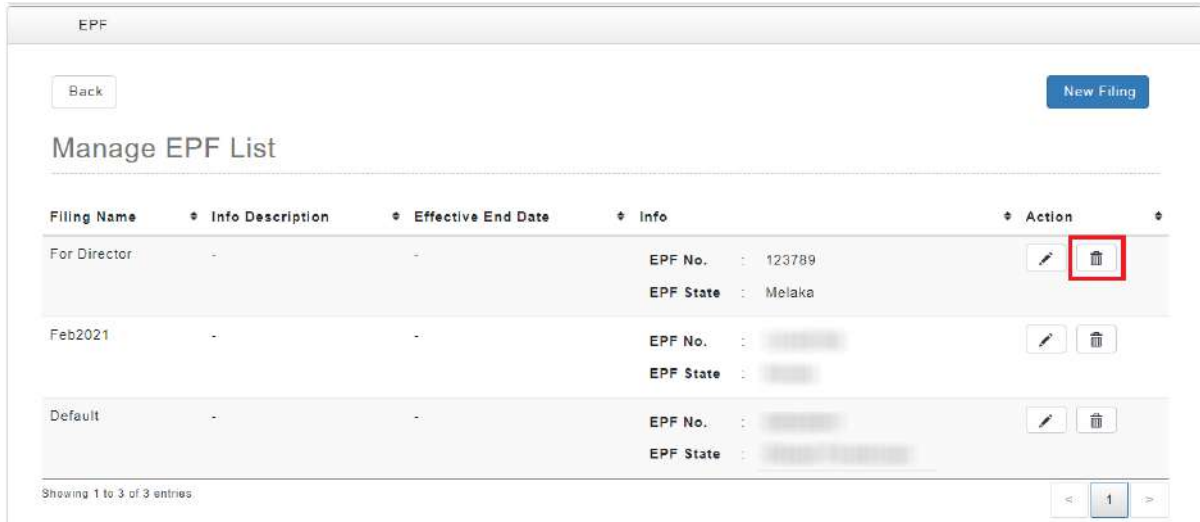
Save Close

*\* The fields in this form will be shown according to the respective statutory types*

### 1.1.5 Delete Statutory Filing

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







1. Click on  icon to delete existing Statutory 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

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

## Confirmation

Are you sure you want to delete this record

Yes

No

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

## 1.2 Statutory List

Users can add one or more Statutory Filing(s) to Statutory List

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

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

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

HRMS Application/ Company Setup / Control Master (Admin)

EPF

Manage EPF **New Effective Date**

EPF List

Effective Start	Effective End	Group By	EPF Payment Group	Info	Contact Person	Action
2021-08	-	Default	Default	EPF No. [Redacted]	EPF State Wilayah Persekutuan	[Edit Icon]

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

EPF

Back Save

New Effective Date

Effective Start \* 2021-07- Effective End \*

More than 1 filing? \* Yes No

Filing Name (Default) \* [Dropdown]

Manage EPF

EPF No. \*

EPF State \*

Contact Person Name \*

Position \*

IC No. \*

Email Address \*

Phone No. \*

**Add New Filing**

*\* The fields in Multiple Filing Form will be shown according to Statutory Setup*



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

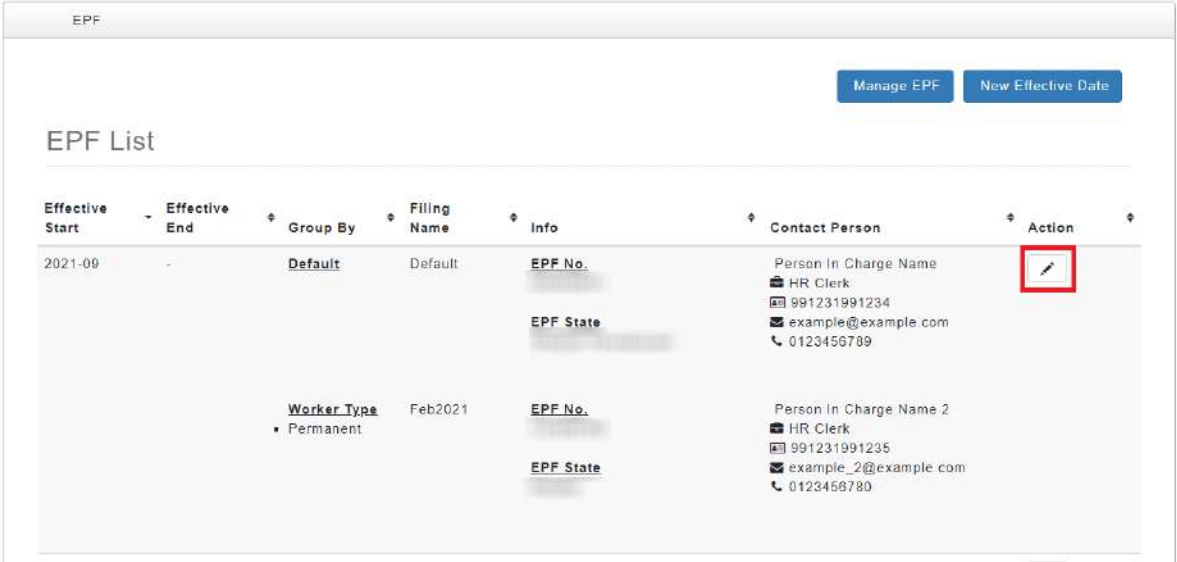
The screenshot displays the EPF (Employer's Provident Fund) form interface. At the top, there is a 'Back' button and a 'Save' button. The main section is titled 'New Effective Date'. It contains a date picker for 'Effective Start' (set to 2021-07) and a field for 'Effective End'. Below these, there is a toggle switch for 'More than 1 filing?' with 'Yes' selected. To the right of this toggle, a red box highlights the 'Group By' dropdown menu, which currently shows 'Worker Type'. Below this section, there are two identical forms for 'Filing Name' and 'Contact Person Name'. The first form has a 'Manage EPF' link and fields for 'EPF No.', 'EPF State', 'Position', 'IC No.', 'Email Address', and 'Phone No.'. The second form has a red box around the 'Worker Type' dropdown, with a note below it stating 'Not default filing will be group by option(s) above'. At the bottom of the form, there is a blue button labeled 'Add New Filing'.

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. Statutory List will be updated with latest Statutory Filing information

## 1.2.2 Edit Grouping of Multiple Statutory Filing

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


1. Click on the  icon to edit



EPF

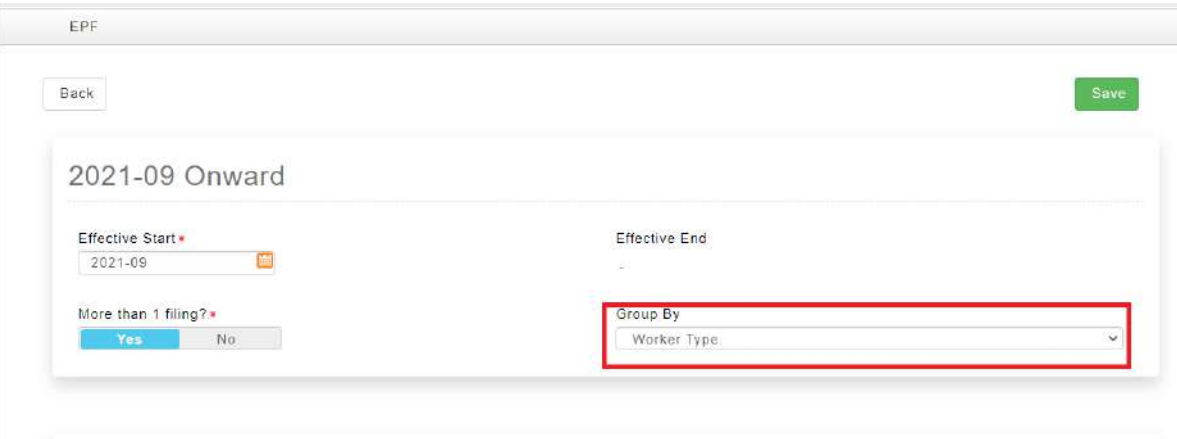
Manage EPF New Effective Date

### EPF List

Effective Start	Effective End	Group By	Filing Name	Info	Contact Person	Action
2021-09	-	Default	Default	<u>EPF No.</u> <u>EPF State</u>	Person In Charge Name HR Clerk 991231991234 example@example.com 0123456789	
		<u>Worker Type</u> Permanent	Feb2021	<u>EPF No.</u> <u>EPF State</u>	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 Statutory Filing form. Select the desired filters then click on **Save** button to save the changes. Statutory List will be updated with latest Statutory Filing information

Filing Name \*

Feb2021

Manage EPF

EPF No

123456789

EPF State

123456

Department

Contact Person Name \*

Person In Charge Name 2

Position \*

HR Clerk

IC No. \*

991231991235

Email Address \*

example\_2@example.com


Phone No \*

0123456780

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

### 1.2.3 Remove Multiple Statutory Filing option

Admin may remove Multiple Statutory Filing and revert back to single Statutory Filing for Statutory List. Follow the steps below to remove Multiple Statutory 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 Statutory Filing will be removed from the Statutory 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.</div> <div>EPF State</div>	<div>Person In Charge Name</div> <div>HR Clerk</div> <div>991231991234</div> <div>example@example.com</div> <div>0123456789</div>	

## PAYROLL SUBMISSION REPORT

### 2.1 Payroll Submission Report (EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat & Amanah Saham)

Admin is able to retrieve different types of Payroll Submission Report. If the selected submission report is EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat or Amanah Saham Type, Filing Name option can be selected from the drop down list based on Filing Name defined in respective statutory filing setup

Payroll submission report for EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat or Amanah Saham type will have an option for Filing Name list that had been setup in respective Statutory Filing Setup.

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

1. Select EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat or Amanah Saham Submission Report Type
2. Select Filing Name 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'. The 'Date As At' is '2021-06-30'. The 'EPF Filing' dropdown menu is highlighted with a red box and shows 'Default (Default)'. Other fields include 'Department', 'Job Class', 'Job Level', 'Worker Type', 'Employee Status', and 'Employee No.' (101 selected).

3. Statutory Filing Information will be automatically inserted into Information section

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

## TEXT FILE

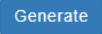
### 3.1 Text File (EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat & Amanah Saham)

Admin is able to generate EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat or Amanah Saham Text File. If the selected text file is EPF, LHDN, SOCSO/EIS, PTPTN, Tabung Haji, Zakat or Amanah Saham Type, the Filing Name option can be selected from the drop down list based on respective statutory filing defined in statutory filing setup.

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

1. Select Filing Name option from the drop down list

The screenshot displays a web application interface for generating text files. At the top right is a blue 'Generate' button. Below it are several input fields: 'Pay Period' with a dropdown set to '2021-07', 'Text File' with a dropdown showing 'CIMB - EPF (BizChannel): 1st Payment | (Payroll BizChannel EPF (1st Payment) text File format for CIMB)', and 'Crediting Date (YYYYMMDD)' with an empty text box. The 'EPF Filing' dropdown is highlighted with a red rectangle and shows 'Default (Default)' as the selected option. Below these fields are two expandable sections: 'All Departments' and 'All Employees', both currently collapsed.

2. Click on  button to generate the text file based on selected Filing Name option