**IMPLEMENTATION CHECKLIST& UNDERTAKING- STAFF PAYROLL\***

**Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Name of In-Charge: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Designation & Contact No.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Training Attended (Yes/No): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ My User id is working (Yes/No):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**I have checked the software functionality with sample/live Data (Yes/No):\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Note: All the points to be verified by Module In-charge/School Authority.**

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| --- | --- | --- |
| **Check list** | **Status (Y/N)** | **Implementation Consultant’s Remarks** |
| Payroll structure has been configured as per school’s requirement |   |   |
| **Salary Heads**\* Salary heads created\* Salary Head mapping to employees |   |   |
| Allowance & Deduction Slabs configured (Slab-wise formulas) |   |   |
| **Pay Scale\*** Pay Scale created\* Pay Scale mapping to employees |   |   |
| **Employee Leaves**\* Leave Allocated\* Leave Balance updated\* Leave Setting configured |   |   |
| **Employee TDS Calculation**\* Employee Other Income\* Employee House Rent\* Employee Allowance u/s 17(2)\* Tax Calculation\* Tax Deposit |   |   |
| **Customized Documents**\* Salary Slip Format\* Monthly Salary Register Format (PDF)\* Monthly Salary Register Format (Excel) |   |   |
| **Reports**\* PF Statement Report\* Bank Salary Sheet Format\* Employee ESI Report Format |   |   |
| **TRAINING PART** |
| **Dashboard**\* Understanding of Graphs and filter button of Staff Payroll Dashboard\* Printing and Downloading feature |   |  Excellent Very Good Good Average |
| **Salary Month**\* How to add month wise salary and how to generate salary\* Use of Sync with Attendance Menu\* Use of Calculate Salary, Calculate PF and Calculate ESI\* How to publish salary and their effect\* Brief understanding of Employee PF, Employee ESI and Employee Attendance\* After generating salary, understanding of MORE ACTION button (Salary Register in pdf and excel, salary slip, ECR, PF Statement Report, ESI Report etc.)\* Use to Auto Calculate disable check box\* Use of Filters and Filter wise report |   |  Excellent Very Good Good Average |
| **Pay Scale**\* Brief understating of Pay Scale and their effect |   |  Excellent Very Good Good Average |
| **Employee**\* How to assign pay scale and salary heads to every employee\* Understanding of From Date and To Date while assigning pay scale and basic salary\* Understanding of Is Percentage check box and amount while assigning salary heads |   |  Excellent Very Good Good Average |
| **Salary Part**\* Understanding of Employee Extra Salary\* How to calculate Arrears\* Understanding of Employee Loan\* Employee Security Money\* Brief understanding Salary Increments\* Refund Security Money\* Tax Deposit |   |  Excellent Very Good Good Average |
| **TDS Configuration**\*Employee Other Income\* Employee Previous Company Salary\* Employee House Rent\* Employee Allowance u/s 17(2)\* Employee TDS Calculate\* Employee TDS |   |  Excellent Very Good Good Average |
| **Reports**\* Yearly Salary Statement\* Salary Head Report\* Monthly Report\* Span Report\* Salary Report Template\* Employee Wise Reports |   |  Excellent Very Good Good Average |
| **Set Up**\* Use of Employee Saving Head\* Brief understanding of Salary Head Data port\* Employee Other Income Group |   |  Excellent Very Good Good Average |
| **Configuration**\* Late coming rules\* Short Leave Rules\* EPS Configuration\* Understanding of Check box while creating salary heads i.e. Deductible, Slab-wise, Depend on attendance etc.\* Importance of DOJ, Staff Type and Department |   |  Excellent Very Good Good Average |

**Remarks by Module in charge (also mention if issue/requirements):**

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 **Remarks by Implementation Consultant:**

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**DISCUSSION POINTS**

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**Signature of Implementation Consultant School Seal**