**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**