

Payroll Processing Webinar Checklist

Core Knowledge

You should now be able to confidently do the following:

Bonus Points

You are a foundU superstar for knowing these:

| Payroll checks and generating payroll | |
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| <ul style="list-style-type: none"> <input type="checkbox"/> Double check shifts approved <input type="checkbox"/> Double check leave before processing payroll <input type="checkbox"/> Complete payroll checks <input type="checkbox"/> Preview payslips <input type="checkbox"/> Edit payslips <input type="checkbox"/> Generate pay and submit to Single Touch Payroll (STP) <input type="checkbox"/> Download ABA file for uploading to your bank <input type="checkbox"/> Navigate to where in the foundU platform you can create an adjustment <input type="checkbox"/> Add a Termination flag for an employee | <ul style="list-style-type: none"> <input type="checkbox"/> Add a deduction (once-off or recurring) <input type="checkbox"/> Manually create a payslip <input type="checkbox"/> Turn on a Payslip flag for an employee on work cover, or an employment restriction or with a special condition. <input type="checkbox"/> Set up a new category in comments for Payroll Comments <input type="checkbox"/> Process a Termination |
| Invoicing (relevant for labour hire) | |
| <ul style="list-style-type: none"> <input type="checkbox"/> View and preview an Invoice <input type="checkbox"/> Edit an Invoice for a client <input type="checkbox"/> Generate an Invoice for a client <input type="checkbox"/> Issue an Invoice and email to a client <input type="checkbox"/> Understand that Invoice data comes from processed Payroll Data | <ul style="list-style-type: none"> <input type="checkbox"/> Delete issued invoice <input type="checkbox"/> Manually create a new invoice (for example where an adjustment to payroll is made) <input type="checkbox"/> Mark an invoice as paid (optional) |

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| <input type="checkbox"/> Download sales report (SAP, XERO, MYOB) for uploading to accounting software | |
| How data gets into payroll | |
| <input type="checkbox"/> Locate your Awards & Agreements <input type="checkbox"/> Locate your position groups (if using) <input type="checkbox"/> Locate where you set up an employee's position, location, payrate when managing employees. <input type="checkbox"/> Locate where you can approve/decline employee's Leave <input type="checkbox"/> Locate where you can Approve Shifts to finalise employee's hours worked | <input type="checkbox"/> Locate where you can approve/decline employee's availability |
| Payroll reports | |
| <input type="checkbox"/> Run post payroll reports: <ul style="list-style-type: none"> <input type="checkbox"/> Standard and Advanced Payroll Report <input type="checkbox"/> Leave Liability Report <input type="checkbox"/> Superannuation Report (Super stream Report) <input type="checkbox"/> Payroll Tax Report | <input type="checkbox"/> Terminations report <input type="checkbox"/> Deductions report |
| Help & resources | |
| <input type="checkbox"/> Ensure to use the Google Chrome browser for best results when using foundU <input type="checkbox"/> Be able to locate the Payroll Processing and Invoicing guides in the help centre. | <input type="checkbox"/> Locate a helpful article on Editing Payslips <input type="checkbox"/> Locate a helpful article on Creating Adjustments |