



CASPER Payroll Helpful Tips

Tip 1 - Tax on leave loading

When a holiday timesheet is entered, the "Calculate Loading" checkbox on the second tab indicates whether loading is calculated on that timesheet. If additionally the "Loading timesheet code" is selected on the holiday pay type, it will automatically create a separate loading timesheet when the timesheet is saved.

The problem is that the original holiday timesheet still has the "Calculate Loading" checkbox selected, so the payrun thinks that original holiday timesheet includes loading as well as the new loading timesheet.

Go to the timesheet and deselect the "Calculate Loading" flag on the original timesheet.

Tip 2 - The reports sort by employee code, I want to sort them by surname. How do I do this ?

The default sort order for reports can be easily changed. Go to the "System Admin->Status and Paygroups" pull-down menu option. On the "Status" tab, click on the blue "Options" page down the bottom of the tab. On the top right there is a "Default report sort order". You can change this to "Surname", and all your reports will sort in name order. Also, the standard "Report Options" form (which displays when you run reports via the "Reports" option on the main menu) has a "Sorting & Printing" tab. On this tab, you can change the sort order when you run individual reports.

Tip 3 - CASPER on Netware with Windows 98

CASPER errors with an error 52 Bad file if it is run from a mapped network drive.

Change to start in a local drive and have the EXE locally. The INI file needs to be local as well.

Tip 4 - How to Reprint Superannuation Figures

If your super is calculated on gross (not "standard"), then you can run the Employee History By Type report (EMPHISTORYBYTYPE.rpt). This report is under the History classification.

When you run the report, specify a date range, and click on the "Selections" tab. Click on the "History types" checkbox, and put a tick against the pay types that you want to view (eg. Gross). Then click on the "Sorting and Printing" tab, and click on "Detailed".

This will give you a list of the particular history pay types by employee.

Tip 5 - Why would the "Termination C tax differ from ETP tax" message occur in a payrun?

This indicates that a manual tax on a Term C timesheet has been entered, but that tax differs from the Etp Tax figure on the ETP data entry screen. This could occur if you manually changed the timesheet but didn't change the ETP data entry screen.

Tip 6 - How can I get a list of current employees to use in a mail merge list?

In reports there under the Employee report classification there is an Employee Export list

Use the Selections tab when report options are asked to select Active only and then run the report to the screen.

Use the export function to create a file for mail merging. The report to the screen has a lot of truncated fields but these fields are exported in full when the export is done.

Tip 7 - What causes superannuation to be calculated for employees that are below the monthly gross limit?

Oncost Paytypes have a Minimum Monthly Total that can be set to stop the oncost from being calculated unless this gross pay figure is reached. If this is not set then the oncost will be calculated. The figure that is checked against this amount is the Month to Date (MTD) figure for this oncost. This figure is reset when an End of Month is performed. If an End of Month is not run then it may calculate the oncost with the MTD amount exceeding the Minimum Monthly Total.

Tip 8 - Can you have Quote Marks in Details?

Generally it isn't advisable to have single or double quotes. These are used in the database languages to enclose text strings, and if it finds both the "enclosing" quotes and the quotes in the field, it could cause problems.

Tip 9 - Why would an employee not get paid their full hours in a payrun?

Check the following items:

- Their standard hours are correct.
- There are no timesheets to reduce their pay.
- Timesheet to be paid have a date in this pay period.
- Their start date is on or before the start of the pay period.

Tip 10 - When adding timesheets for a special pay, the pay cycle description shows the next full pay period. Is this correct?

When the pay cycle description is entered, CASPER does not know the payrun will be a special run. The dates are ignored when you choose a Special Payrun in Payrun.

Tip 11 – Deleting new employees

The employee deletion screen will not allow you to enter a date after to the current financial year start date. If you enter such a date and tab off, it will just blank out the date. The reason it does this is to prevent the deletion of employees that were terminated or paid in the current year.

If the employee you are trying to delete was added in error, you can either edit his terminated date so that it is before the start of the current year, or edit his paid to date to a date before the start of the current year (and choose the "inactive" option

Then go to the Delete employees option and click on the employee row and choose "Delete Selected".

Tip 12 – Superannuation Schemes Available

There are 3 types of superannuation that can be paid.

1. employer

- a) set this up as an On Cost and nominate whether it is a percentage or an amount. If there is a mix for the one fund then there needs to be 2 on costs. (see the help for notes on specific fields)
- b) When you set the on cost up set the type as Super
- c) Once the oncost is saved, call up the on cost again and click on the sub tabs (blue) at the bottom to fine tune the calculation. Most super is calculated on the Gross except for selected payments. Use the timesheets and allowances sub tab to nominate which timesheets to exclude e.g. overtime.
- d) After the oncost is completed, you must attach the oncost to relevant employees via the Employee, Tables, Oncost tab. Make sure the line is enabled.

2. employee before tax (salary sacrifice)

- a) set up as a deduction and nominate the deduction as a superannuation type with the before tax box ticked.
- b) Link the deduction to the oncost code for the employer contribution for reporting purposes.
- c) After the deduction is completed, you must attach the deduction to relevant employees via the Employee, Tables, Deduction tab. Make sure the line is enabled.
- d) After saving the deduction click on Create Timesheet at the bottom of the form. This will add a timesheet type with the same code as the Deduction and this can then be used in timesheet entry to vary a deduction via the Timesheets entry form rather than changing the amounts on the Employee/Tables tab. Note that changes done via the timesheets is a one off change for a pay and the deduction (or oncost, allowance etc) will revert to the amount on the employee tables lines for the next payrun. If a change is to occur for a period of time you can use the Date range on the deduction and on cost lines or the Remaining facility for a reducing amount.

3. employee contribution (taxed)

This is set up as per the before tax deduction but don't tick before tax.

Tip 13 – Payrun an employee has been overpaid. How do you correct this?

The payrun has been updated/finalised and the employee has been paid the money.

To correct this you need to do the following steps:

1. Do a special reversal payrun for the whole incorrect pay.
2. Then do a special pay for the correct amount.
3. Bank the cash from the employee back into the company.

Tip 14 – FBT Year End Rollover

Here are some tips to help you:

1. Do an end-of-year rollover by going to Period End ' FBT Close Off. This will move all the fringe benefit amounts into the appropriate boxes for the June Payment Summaries.
2. Check that the deduction amounts are now correct (if you didn't close off Last Years FBT, you may have to adjust the numbers manually):
 - (a) Go to System Admin ' Add Opening Balances ' Tables ' Deductions. The amounts for the 12 months to 31st March should now be in the "Pre-Cutoff YTD" column.
 - (b) If any cars are involved, you will have to calculate the taxable value (based upon either the Statutory Formula or the Actual Usage method) and insert it into the appropriate "Pre-Cutoff YTD" box.
3. Make sure that your gross-up factors are correct. The rate is normally 2.0647 (Type 1), but some benefits (such as house mortgages and loans) should use the Type 2 rate of 1.8692. To do this, go to Pay Types ' Deductions; then select each fringe benefit code and check that the fringe benefit deduction box is selected and that the FBT rate is correct.

Tip 15 – Setting up a New Company

To add a new payroll company to your login list or attaching a backup copy.

1. You need to have the file saved in the Data folder under Casper Payroll.
2. On the login menu go to the security option at the top menu and add a new company for your user login via the User Companies tab.
3. Search for the Payrollxxxx.mdb file (e.g. PayrollSchool.mdb)
4. Give it a name for the menu e.g. School Payroll.
5. Enable the company by ticking the box.
6. Click the save button and then exit out of the screen.

When you go back to your login list your company will appear.

Tip 16 – Payrun Overflow Error

When an overflow error appears while doing a payrun you need to take note of the employee that is being processed and click OK then go to the employee and check the pay rate and the number of hours. It is most likely that the number of hours is either a very small number or the pay rate is a very large number.