

XERO EMPLOYEE ONBOARDING

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Process Objective: To optimize integration of newly onboarded employees in Xero by implementing a standardized process that synchronizes details from Visual Care to avoid financial imbalances caused by system errors / defaults due to identical profile features.

Process Trigger:

- HR Department's notification of *fully compliant* onboarded employee.
- Visual Care worker profile is created by HR Department
- Accounts Team identified newly rostered employee in Work Order Tracker / Visual Care

Process Requirements:

- Superannuation Choice Form
- ATO Tax Document/s
- Onboarding Tracker
- Visual Care Profile
- Staff List
- Xero Payroll Access

Sub Process 1: Xero Onboarding

1. HR notifies newly onboarded workers or Accounts identifies new employees not yet onboarded
2. Check if all compliance documents are provided on the Onboarding Tracker. Use the onboarding documents and VC profile as reference to creating the Xero profile.
3. Proceed to Xero Payroll > Employees > Create New Employee
4. Fill out the mandatory fields on the following tabs.
 - a. Details
 - i. Given Name and Last Name (must match with Visual Care profile)
 - ii. Birthday, Sex, Address, Contact Number, Email
 - b. Employment
 - i. Employment Type: "Employee"
 - ii. Income Type: "Salary & Wages"
 - iii. Employment Basis: "Casual"
 - iv. Start Date: Input date of notification or date of onboarding whichever comes first
 - v. Payroll Calendar: Fortnight A / Fortnight B (see sub process #2)

- vi. Ordinary Earnings: CasL1PP1 Ordinary Hours Weekday Daytime
- vii. Superannuation: Select superfund and input member number (see sub process #3)
- c. Taxes
 - i. TFN – input employee’s TFN, if not available, highest tax bracket must be applied
 - ii. Tax Scale: “Regular”
 - iii. Tick the “Claim the Tax-Free Threshold” checkbox
- d. Bank Accounts
 - i. Statement Text: “SSF Wages”
 - ii. Account Name: Worker’s Legal Name
 - iii. Input the BSB Number and Account Number as specified
- 5. Update the Staff List and Onboarding Tracker with the worker’s assigned fortnight group.
- 6. Inform Accounts Team and HR x Accounts chat of the Pay Group assignment.

Sub Process 2: Assigning the Payroll Calendar

1. For all employees onboarded to Xero for the week ending 7 April 2024 – the Accounts Team have assigned Fortnight A as the pay group.
2. Fortnight B will be assigned for the succeeding week ending 14 April 2024, and the cycle repeats from Fortnight A.

Sub Process 3: Superannuation

For Employee Nominated Superannuation

1. For Employee Nominated Superfund, find the superfund name on the list and select, then add member number.
2. If superfund name is not available, proceed to Payroll Settings > Superannuation Settings > Add super fund
3. Refresh Employment page, check if new superfund is added and perform #1.

For Employer Nominated Superannuation

4. For Employer Nominated Superfund, use AustralianSuper and the TFN of the employee as the temporary member number.
5. After the first contribution is remitted member number will be updated upon inquiry with AustralianSuper.

For Self-Managed Super Fund (SMSF)

6. For Self-Managed Super Fund (SMSF) proceed to Payroll Settings > Superannuation Settings > Add super fund > Select type to Self-Managed Super Fund.
7. Add SMSF details as necessary. Take note - Electronic Service Address Alias is necessary for the super payments to go through.

8. Refresh Employment page, check if the SMSF is added and perform step #1.