

# Managing Payroll Using Xero



*caring, flexible, professional*

**Duration: 1 day**

## TARGET AUDIENCE

This one-day course is intended for people who need to know how to set-up and process payroll, and meet regulatory reporting using Xero.

## LEARNING OUTCOMES

The skills and knowledge covered in this course are sufficient to help you correctly set-up and process payroll, And perform regulatory payroll reporting functions.

### Bookkeeping Concepts

- Bookkeeping terminology
- Account Types
- The Accounting Equation
- Cash v Accrual
- Key Financial Reports

### Understanding Payroll

- Legislation
- Handy sites
- Percentages, Rates, & Ratios
- Terminology
- Employer Obligations

### Xero Overview

- Sign Up and Login
- Dashboard and Menu Overview
- Tabs and Menus
- Getting Help
- Tips for getting around Xero
- View multiple pages
- Date Entry shortcuts
- Calculator
- Roles and User permissions

### Payroll Preparation

- Payroll Accounts
- Tracking Categories
- Payslip Logo and Settings
- Pay Items
- Set up deduction types
- Reimbursement types
- Set up Leave
- Superannuation

### Employees and Historical Balances

- Employment
- Tax Declaration, Save and File
- Status
- History
- Leave Entitlements
- Bank Accounts
- Pay Template

### My Payroll

- Employee Perspective
- Apply for Leave
- View your Details
- View your own Pay slips
- Print your Payment Summary
- Submit a timesheet

### Processing Pays

- Add a Pay Run
- Review and Modify
- Complete a Pay Run
- Post Pay Run
- Download ABA file
- Payroll Adjustments
- Create an Unscheduled Pay Run
- Unpost an existing Pay run
- Email or Print Pay slips

### Final Pay

- Set unused leave as paid on termination
- Process termination pay
- Process a redundancy in the final pay

### Superannuation

- Setup Auto Super
- Create a payment batch
- Authorize a payment batch
- Reconcile super payments
- Process superannuation payments without Auto Super
- Arrange Payments to each super fund
- Reconcile super payments

### Payroll Reporting

- Superannuation Accrual Report
- Payroll Reports
- Reconciling the Payroll
- Paying PAYG

### Payment Summaries

- End of Financial Year payroll checklist

### Single Touch Payroll

- Future Single Touch Payroll update

**Duration: 1 day**

**Class size: 10 max**

**Times: 9am to 4pm**

**Where to from here?:** Xero in a Day, Smarter Xero, Excel courses