

## RE-OPENING A CLOSED EMPLOYEE

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To have your productivity hours correct in productivity reports it is best to create a new employee if they have left and then returned to your practice.

## HOW TO CHANGE OR UPDATE EMPLOYEE CHARGE RATES

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1. Open up the relevant employee

The Employee Details screen appears displaying the Main tab.

2. Select the Charge Rates tab.
3. Enter an end date on the old charge rate
4. Enter a new line with a start date and select the relevant charge rate type and key in the new value.
5. Click OK to save changes.

**Note:** This can be done in advance of the actual change in charge rate

## HOW TO CHANGE OR UPDATE EMPLOYEE COST RATES

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1. Open the relevant employee
2. Select the Main tab. Enter in the new cost rate.

Cost/Hr

**Note:** The new cost rate will take effect immediately as it is not date driven. Do not change the rate until all timesheets with the previous rate are keyed in.

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# ACCOUNTANTS OFFICE EMPLOYEE

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## Quick Reference Guide



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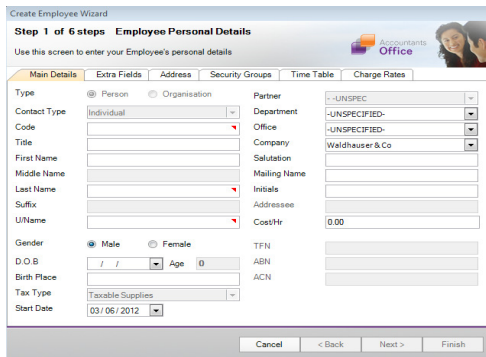
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## CREATING A NEW EMPLOYEE

1. Select Open>Employee from the Contacts menu.
2. Select Create Employee from the Task Bar.

The following Employee wizard will appear



**Note:** Mandatory fields have a red triangle in the right-hand side of the field.

**Step 1 of 6 - Main Details** - Enter all the information required and click next.

**Step 2 of 6 Employee Extra.** Enter the extra field values if necessary and click next.

**Step 3 of 6 Employee Address.** Enter the address if required and click next.

**Step 4 of 6 Employee Security.** All new employees automatically belong to the security group called “Everyone”. If this employee is to belong to a different group then delete out the Everyone group and add the relevant group and click Next.

**Step 5 of 6 Time Table** appears. Key in the hours to be worked for each day of the week and click Next.

**Step 6 of 6 Employee Charge Rates.** Enter the start date, select the charge rate type and enter the hourly rate into the appropriate fields for each charge rate the employee can use and click next.

**Note:** Charge rate called Standard is the default rate used in Timesheet data entry.

The Employee Details screen appears and the employee has been added.

To finish creation of this employee you need to do the following:

### Set up Employee Password if required

From the employee main tab, select Change Password from the task bar.

### Enter budgets if required

Select the employee budget tab, and key in the Standard hours and Budget hours. The amount columns will automatically prefill.

### Confirm a cost rate has been entered

Select the employee Main tab and in the Cost/Hr field key in an hourly cost rate value if required by the practice.

**Note:** Cost rates will only be reflected in timesheets entries made after you have entered a cost rate. The system will not update any entries made prior to the cost rate being entered.

## EDITING AN EMPLOYEE NAME

1. Open the relevant employee
2. From the Main tab select “Edit employee details” from the task bar

Make the necessary changes and select OK to save.

## CLOSING AN EMPLOYEE

Open up the relevant employee

The Employee Details screen appears displaying the Main tab.

1. Enter a relevant date in the End Date field.
2. Tick the Inactive check box and click OK to save changes.