



How to Enable PF & ESI and allocate the salary component.

Step: 1

How to activate the PF and ESI component

Please refer the below mentioned path to activate the component

Go to **Company settings** >>Select **Salary components** >> Select the component **PF and ESI** >> Click on **View/Edit** >>Tick on **Active** >> click on **Save**

The screenshot shows the 'Payroll Settings' interface for a 'Statutory Component'. The left sidebar lists various settings categories, with 'Salary Components' selected. The main form area contains the following fields and options:

- Name ***: Provident Fund
- Abbreviation ***: PF
- Effective Date ***: 01/04/2016
- Pay Type ***: Statutory Component
- Calculation Type ***: Formula
- Calculated On ***: (partially visible)
- JV Code**: (empty field)
- Map to**: -- Select --
- Round off value ***: Nearest to 1 Rs
- Component Type**: Fixed component, Variable component
- Other Options**: Is an FBP component, Attendance dependent, Part of CTC, Create dependent component, Active (highlighted with a red box), Is an FFS component

Once the component is activated, allocate the component to employees

Step 2: How to allocate a pay component in salary structure of employees?

In the same page, select Pay allocation.

SL.NO	COMPONENT	TYPE	TAXABLE	FIXED	
1	Reimbursement	Earning	No	No	View/Edit
2	Food Coupons Arrears	Earning	No	No	View/Edit
3	Food Coupon Recovery	Earning	No	No	View/Edit
4	ARREARS	Earning	Yes	No	View/Edit
5	Bonus	Earning	Yes	Yes	View/Edit

Select the Pay Component as PF employer >>Month >> Branch. The details of all active employees who don't have that pay component added in their salary structures would be displayed and Save.

Salary structures would be displayed

Assign Pay Component

Pay Component: Resigned Employees:

Select Month:

Branch:

Advanced Search

Employee Code: Employee Name:

No Records

Note : Similarly allocate PF employee, ESI employer and ESI employee component to employees.

Step 3A: How to Enable PF and ESI employee-wise

Go to **Employees menu** >> select the **Employee** >> click on **view/edit** >> Under **PF,ESI** tab >> check the box **Employee covered under PF** and update all the field and click on **Save**

Personal | Official | **PF, ESI** | Leave | Salary | Employee Docs

Employee covered under PF

PF UAN

PF Number

PF Enrollment Date

EPF Number

Relationship

Entitled to EPS

Employee is covered under ESI

ESI Number

*Note: If the employees PF and ESI details is available please do enter the same, or if the details are not available then please tick **Employee covered under PF and ESI option** and the details can be updated later and by default application will calculate amounts based on the component configuration.*

Step: 4

Once PF and ESI option is enabled in the same page select **Salary tab** click on **Calculate** and click on **Save**.

Personal | Official | PF, ESI | Leave | **Salary** | Employee Docs

CTC (Monthly)

PF

PF Employer

Display CTC-based components

<input checked="" type="checkbox"/>	Special Allowance	0	<input type="text" value="7430.00"/>	<input type="text" value="89160.00"/>
<input checked="" type="checkbox"/>	Provident Fund	BASIC*12%	<input type="text" value="720.00"/>	<input type="text" value="8640.00"/>
<input type="checkbox"/>	Profession Tax	Earnings	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	PF Employer	BASIC*12%	<input type="text" value="720.00"/>	<input type="text" value="8640.00"/>
<input checked="" type="checkbox"/>	Car Conveyance	0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
<input checked="" type="checkbox"/>	Helper Allowance	0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>
<input type="checkbox"/>	Medical Allowance	0	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>

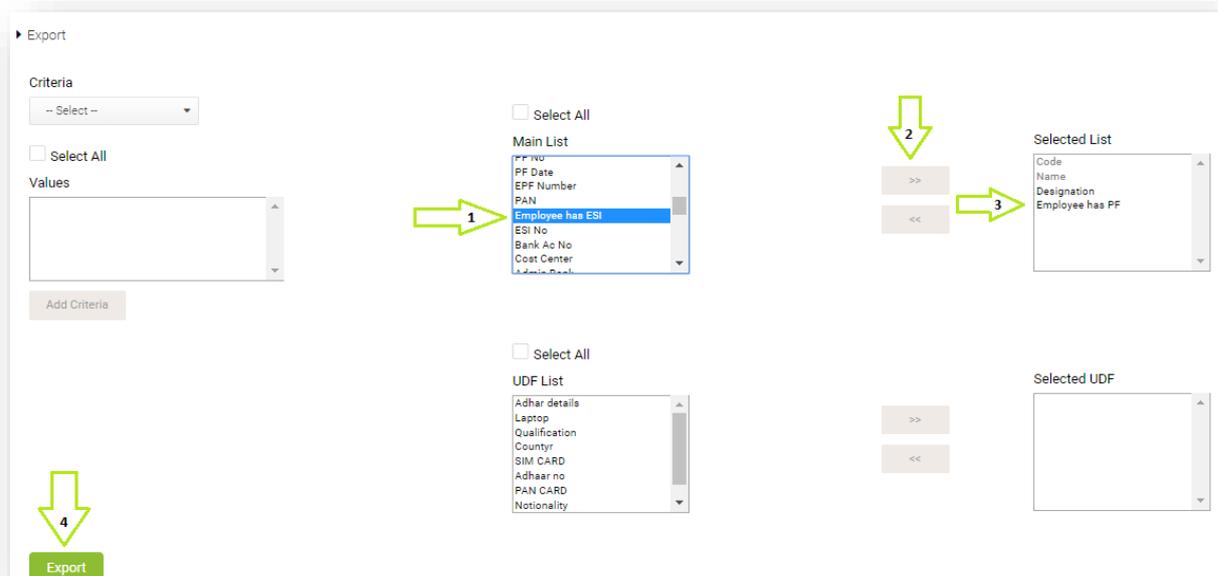
Difference Amount

Step 3B How to Enable PF and ESI bulk-wise

Go to **Employees** menu >> in **Master** tab >> in **Add Employee** button expand dropdown list >> and click on **Bulk Edit Employee Master**

In Employee Master Export page;

- Select the Criteria to filter the employees on given categories
- In the Main List, select **Employees has PF/Employees has ESI** option and move this to the **Selected List**
- Click **Export** at the bottom of the screen; an excel Template gets downloaded. Update the Template as required and Upload it at the same path.



Step 4

Now Salary breakup needs to be recalculated after PF is configured.

Go to **Employees** menu >> **More** >> **Salary Changes** >> Select **Recalculate Salary Breakup**

Select the relevant Locations and click **Update CTC**.

