



Our Software. Your Freedom.

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JA

Client Guide

Data Cleanse of Inactive Employees

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Introduction

The aim of this guide is to show you how to delete an employee's record you no longer need, how to run reports to assist you with knowing what you may want to remove and how to export Payslip information for each individual employee.

How to run the Employee Export report

To assist you with identifying what employees are classed as inactive (any employee without a payment) we have provided you with an Employee Export report.

On this report, you will be able to filter based on leaver dates and last paid dates to give you an idea of who will be classified as inactive when it comes to your JA invoice and billing. To begin, click on Reports from either view.



Search for "Employee Export report" or navigate to the page where the report is situated. Then simply click on the report's name for it to load.



The report will then open in a new window.

You can then review the data within this window, Print or select the Save option and choose from the options available including PDF, Excel, CSV etc.

Company Ref	Employee ID	Title	Surname	Forename	Middle Name	Start Date	Leave Date	Last Paid	Extent
PAYROLLAK	150	Mr	Cheetham	Luca		01/04/2022		18/08/2023	
PAYROLLAK	151	Mr	Mercema	Karim		01/04/2022		18/08/2023	
PAYROLLAK	152	Mr	Junior	Benjamin		01/04/2022		18/08/2023	
PAYROLLAK	153	Mr	Camavinga	Jordan		01/04/2022		18/08/2023	
PAYROLLAK	154	Mr	Straw	Luffy		01/04/2022		18/08/2023	
PAYROLLAK	160	Mr	Bloggs	Joe		03/03/2023		06/04/2023	
PAYROLLAK	256	Miss	Bloggs	Joanna		09/05/2023	07/07/2023	07/07/2023	



As a final check to ensure you are deleting the right employee, one way you can uniquely identify an employee in JA is the Employee ID. This can be seen within the URL for the Employee Details page. Below shows Benjamin Junior and we can see that the URL shows the number 152, which is Benjamin's employee ID.



Note: The Leave Date will show you all leavers, any leave data older than current billing month will be categorised as inactive from a billing perspective.

Note: Last Paid, shows the last time a live employee was paid, likewise to the above, any not paid within the billing month will be categorised as inactive from a billing perspective.

How to export payslip information for an employee you wish to delete

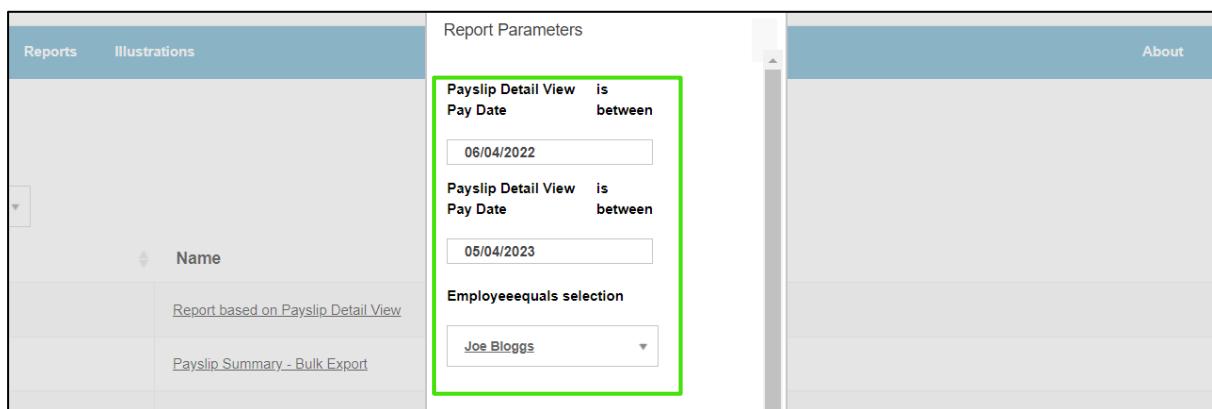
Please follow the steps above to navigate to the report page from the Company menu strip (not the smaller Home Page).



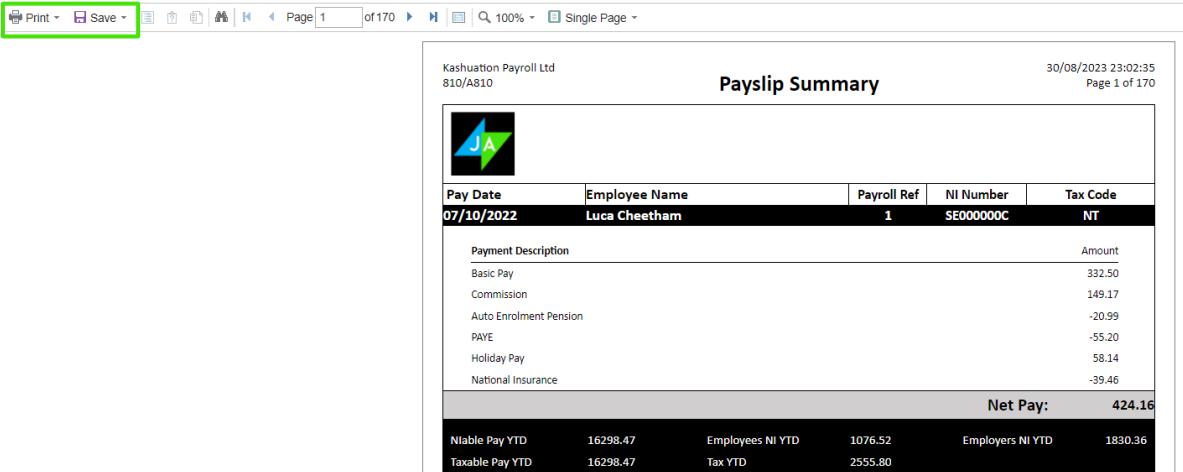
In the reports page, please search for "Employee Payslip – Bulk Export". Then simply click on the report's name for the conditions pop up to appear.



In the Report Parameters, please enter the date range you wish to export the payslip information and select from the drop-down the respective Employee who you need this data for.



You can then review the data within this window, Print or select the Save option and choose from the options available including PDF, Excel, CSV etc.



Pay Date	Employee Name	Payroll Ref	NI Number	Tax Code
07/10/2022	Luca Cheetham	1	SE000000C	NT
Payment Description				
Basic Pay				332.50
Commission				149.17
Auto Enrolment Pension				-20.99
PAYE				-55.20
Holiday Pay				58.14
National Insurance				-39.46
				Net Pay: 424.16
Nitable Pay YTD	16298.47	Employees NI YTD	1076.52	Employers NI YTD 1830.36
Taxable Pay YTD	16298.47	Tax YTD	2555.80	

Note: The saving and storage of this data is your responsibility, once the data is deleted from the JA system it will no longer be accessible in any form.

Note: If you wish to add a logo to the report like the above example, please ensure you upload an image in the Invoice Settings section within the respective company. (Hover over Trading and then click on Invoice Settings)

How to delete an employee

On the JA software, you are now able to delete an employee's data that you no longer need and please note, the steps you are about to take are **irreversible**.

In order to be able to delete a user, you will need to ensure they are either a leaver or have never had any payments made to their records.

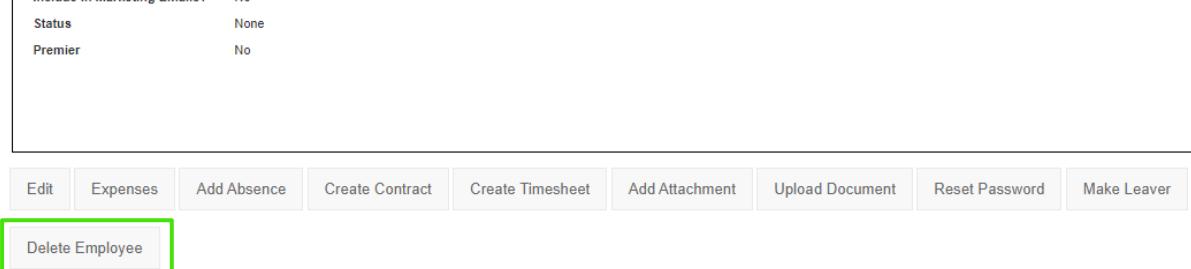
Firstly search for the employee you wish to remove from the Employees page, followed by clicking on their name to be taken to their details page.



Employees List						
Create New Employee		Import Employee		Assign From Staging		Include Leavers: <input checked="" type="checkbox"/> Include Dormant: <input type="checkbox"/>
Emp Ref	Theodore Russo	Name	Email	Username	Contract	Contact
	Russo, Theodore	test@ja.com	theodore.russo	8813	8813 Zen	No
10	Show 1 to 1 of 1 entries	All selected	First	Previous	1	Next

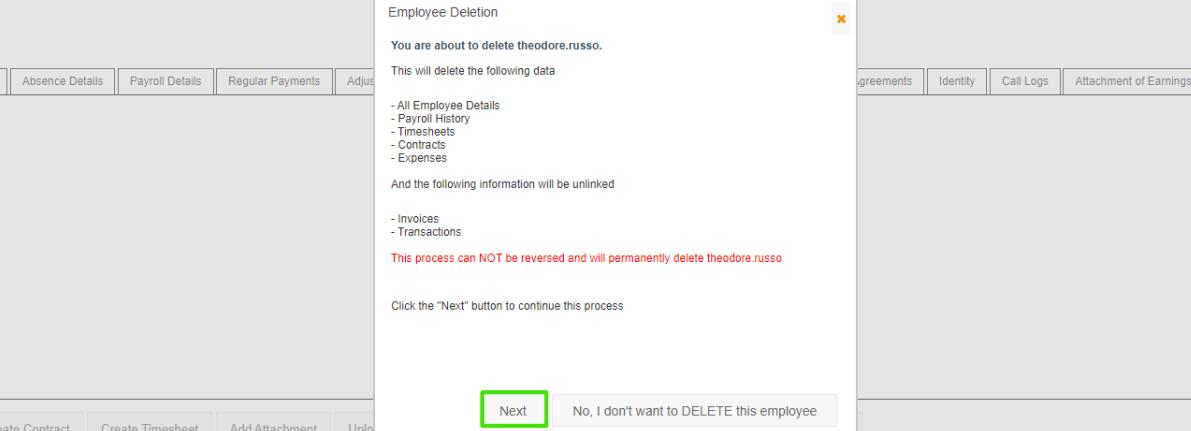


Next, click on the Delete Employee button at the bottom of the page.



The screenshot shows the 'Employee Details' page. At the top, there is a table with two rows: 'Status' (None) and 'Premier' (No). Below the table is a horizontal row of buttons: 'Edit', 'Expenses', 'Add Absence', 'Create Contract', 'Create Timesheet', 'Add Attachment', 'Upload Document', 'Reset Password', and 'Make Leaver'. The 'Delete Employee' button is located in the bottom left corner of the page, highlighted with a green box.

A new pop-up will then appear acknowledging what you are about to do. Please take your time and read this thoroughly before pressing Next.

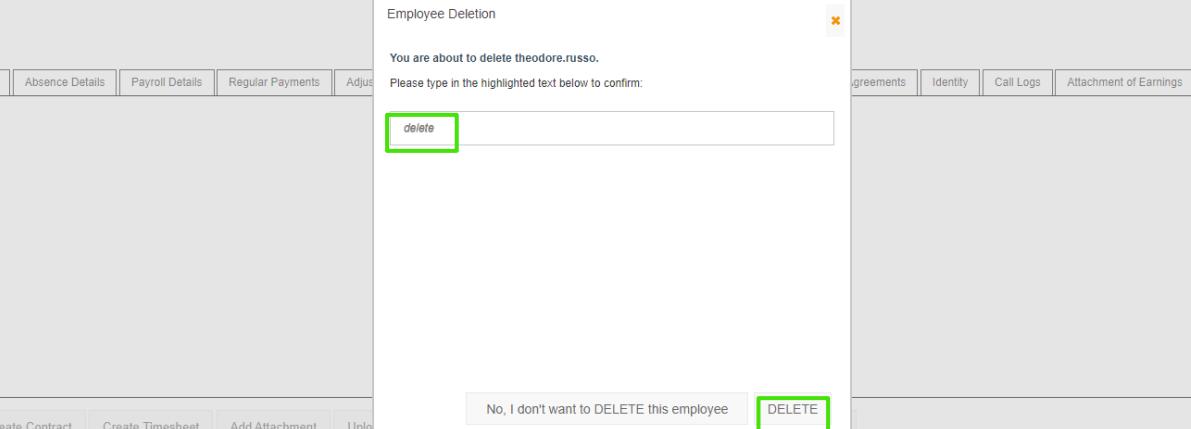


The screenshot shows the 'Employee Deletion' pop-up window. It contains the following text:
 You are about to delete theodore.russo.
 This will delete the following data:
 - All Employee Details
 - Payroll History
 - Timesheets
 - Contracts
 - Expenses
 And the following information will be unlinked:
 - Invoices
 - Transactions
 This process can NOT be reversed and will permanently delete theodore.russo
 Click the "Next" button to continue this process
 At the bottom, there are two buttons: 'Next' (highlighted with a green box) and 'No, I don't want to DELETE this employee'.

The employee data deleted as part of this process includes:

- All personal, administrative and payroll data store in JA
- All associated payslips, pay statements, P45s and P60s documents
- All information with respect to timesheets, holiday pay and expenses
- All contracts and assignment information store in JA

Before you can press DELETE and remove all associated data with the said Employee, you will need to enter the highlighted word "delete".



The screenshot shows the 'Employee Deletion' pop-up window. It contains the following text:
 You are about to delete theodore.russo.
 Please type in the highlighted text below to confirm:
 (The word 'delete' is highlighted with a green box)
 At the bottom, there are two buttons: 'No, I don't want to DELETE this employee' and 'DELETE' (highlighted with a green box).

The employee will now be deleted and you will get a message to say this has been completed.



Note: This process is not reversible and once the DELETE button is entered, all records will be removed.

Summary

Thank you for reading this guide. As stated once an employee is deleted, the employee and their details cannot be reinstated. This process is irreversible and the saving and storage of any document downloaded will be your responsibility as they will have been deleted with no way of getting this data back.

If you have any questions or require any help with this process, please contact our support team who will be happy to guide you through it.

