Swiss Salary Learn

Update 5068.000

Date: 12.11.2026
More information: learn.swisssalary.ch

Swiss Salary

Microsoft

swissdec certified plus

copyright 1998 - 2026 Swisssalary Ltd.

Legal information

SwissSalary Ltd. reserves all rights in this document.

No portion of this work may be reproduced in any form or by any means, graphical, electronic or mechanical, including copying, recording, or by any information storage and retrieval systems, without the express written consent of SwissSalary Ltd.

SwissSalary Ltd. retains all intellectual property rights it is entitled to, in particular all patent, design, copyright, name and company rights and the rights to its knowhow.
Although all precautions have been taken during the creation of this document, SwissSalary Ltd. assumes no liability for errors, omissions or damage that may result from the use of the information contained in this document or from the use of the programs and source code. In no event shall SwissSalary Ltd. be liable for any loss of profit or other commercial damage caused or alleged to have been caused directly or indirectly by this document.

copyright 1998 - 2026 Swisssalary Ltd.

Date of change: 12.11.2026

Legal Notice
SwissSalary AG (SwissSalary Ltd.)
Bernstrasse 28
CH-3322 Urtenen-Schönbühl
Schweiz

Phone: +41 (0)31 950 07 77
support@swisssalary.ch
swisssalary.ch

Social media
Youtube
Facebook
Instagram
LinkedIn
Xing
X

Certification
Swissdec

Index

1 Update 5068.000 | User

1.1 Update 5068.000 | Introduction 7

1.2 Pay Raise 9

1.2.1 Pay Raise | Reasons 9

1.2.2 Pay Raise | List of Pay Raises 9

1.2.3 Pay Raise | Pay Raise Journal 9

1.2.4 Pay Raise | Columns locked 9

1.2.5 Pay Raise | Status Change 9

1.2.6 Pay Raise | Direct Upload 9

1.2.7 Pay Raise | Error message Direct 9

1.2.8 Pay Raise | Users without access 10

1.3 Employee 10

1.3.1 Foreign ZIP Code | Error Message 10

1.3.2 Employee card | Post Tax City 10

1.3.3 Employee card | Allocation Group and Department 10

1.3.4 Employee card | Posting Group TimeMachine 10

1.3.5 Employee card | IT rate TI 10

1.3.6 Security Filter | Insurance and Benefit Coverages 11

1.3.7 Employee Dossier | Paycheck 11

1.3.8 Infobox | Employee Dossier 11

1.4 Payroll 12

1.4.1 Payroll | No Place of work specified 12

1.4.2 Payroll | Validity of the Income Tax Rate 12

1.4.3 Payroll | Error Message When Making a Payment After an Employee's Resignation 12

1.4.4 Person with Foreign Currency | Exchange Rate 12

1.4.5 Reporting Journals | Amount, Quantity, or Valuation Blocked 12

1.4.6 TapBoard | Performance 13

1.4.7 TapBoard | Batch Entry 13

1.4.8 Security Filter | Tapboard 13

1.4.9 Security Filter | TapBoard Display Error 13

1.4.10 Security Filter | Tapboard Dimensions 13

1.4.11 Security Filter | Tapboard hidden rows 13

1.4.12 Security Filter | Withholding Tax Adjustment 13

1.4.13 Security Filter | Social security deductions 14

1.4.14 Security Filter | Single Parent Family 14

1.4.15 SecurityFilter | Post Payroll 14

1.5 Reports 14

1.5.1 Plausibility Check | Document Date 14

1.5.2 Management Rapport | Selection field 14

1.5.3 Management Rapport | Time Balances 14

1.5.4 Employee Salary Statement | Time Types 15

1.5.5 Rate Fluctuation List | Reasons for Departure 15

1.5.6 AHV Annual Statement | Withdrawal and Re-enrollment Within a Month 15

1.5.7 Benefit Statement | several jobs 15

1.5.8 Benefit Statement | Empty Payroll Run in the Month of Termination 15

1.5.9 Salary certificate as a PDF | Error message 15

1.5.10 SecurityFilter | Family Allowance Statement 15

1.5.11 Security Filter | Mail Merge 16

1.5.12 Security Filter | Absences Mirror 16

1.5.13 Reports | Portrait Layout 16

1.5.14 Report | Salary Type List 16

1.5.15 Evlauation of time | Absence Entitlement Without Pay Types 16

1.6 Salary Declaration 17

1.6.1 Salary Declaration | Action Declare Salary 17

1.6.2 Location ID, Municipality Number | Foreign Locations 17

1.6.3 Declare Salary | E-Mail 17

1.6.4 Declare Salary | FAK Total 17

1.6.5 Declare Salary | Validity of Contracts 17

1.6.6 Declare Salary | Salary certificate 17

1.6.7 Declare Salary | IT EMA 18

1.6.8 Income Tax | Annual Corrections by Canton 18

1.6.9 Statistics Update | Workplace with Lessons 18

1.6.10 EMA | Resignation date 18

1.7 Interfaces 18

1.7.1 UKA 24.1 | Employee Absences 18

1.7.2 UKA 24.1 | Organizational Units 19

1.7.3 UKA 24.1 | Salary Type Assignment 19

1.7.4 UKA 24.1 | Assignment Fields for Payroll Setup 19

1.7.5 UKA 9.1 and 24.1 | Number of children 19

1.7.6 GastroSocial | Report Multiple BVG Codes 19

1.7.7 GastroSocial | REC01 Field Adjustments 19

1.7.8 SAP Excel COFI Export | Cost Center 20

1.7.9 Financial Interface | Target System in the Allocation Group 20

1.7.10 Open Interface | Error Log 20

1.7.11 SmartPort | Accept Changes Automatically 20

1.7.12 SmartPort | SIMIC No. 20
1.7.13 SmartPort | Working Group 20
1.8 Administration 21
1.8.1 Rollencenter | Adjustments 21
1.8.2 Organization | System Initialization 21
1.8.3 Liste Salary Type | Shortcut 21
1.8.4 Working Group | Presentation 21
1.8.5 Allocation Group | Reporting Journal for Daily Allowances KLE 21
1.8.6 Head of the Authorization Department | TimeMachine and Salary Entry 21
1.8.7 Period Start Date | Working Group 21
1.8.8 Placeholder | Title, First Name 22
1.8.9 Payroll Setup | Swissdec Setup 22
1.8.10 Payroll Setup | Swissdec Setup - Basic License 22
1.8.11 Payroll Setup | SUA Notifications 22
1.8.12 Benefit | Payroll Runs Across Periods 22
1.8.13 Benefit | fixed amounts 22
1.8.14 Benefit | Setting Inherited Benefits to Inactive 23
1.8.15 Benefit | Typ delete 23
1.8.16 Benefit | Deleting types is restricted 23
1.8.17 Security Filter | Benefit 23
1.8.18 SecurityFilter | CrossCompany TableViewer 23
1.8.19 SUA | Timestamp 23
1.8.20 SUA | Certificate Lock Password 24
1.8.21 SUA Certificate | Reset Password 24
1.9 KLE 24
1.9.1 Security Filter | Create KLE Case 24
1.9.2 KLE | Number of Injuries 24
1.9.3 KLE | Transfer Daily Allowance 24
1.9.4 KLE | Digitalization Scope 25
1.9.5 KLE | Daily Benefits Paid to Third Parties 25
1.9.6 KLE | Accident Report 25
1.9.7 KLE | Negative hours 25
1.9.8 KLE | Claim Report 25
1.9.9 KLE | Claim Report Function Name 25
1.9.10 KLE | Stories are complete but have not been submitted 26
1.9.11 KLE | Display Dialog Text 26
1.9.12 KLE | Overview of Daily Allowances Received and Refunds 26
1.10 SwissSalary Budget 26
1.10.1 Budget | Forecast 26
1.10.2 Budget | Forecast Benefit Assignments 26

1.10.3 Budget | Employment % Column 26
1.11 SwissSalary EasyRapport 27
1.11.1 EasyRapport | Time Information 27
1.11.2 EasyRapport | Import Table 27
1.11.3 SecurityFilter | EasyRapport Transfer 27
1.11.4 Security Filter | EasyRapport Employee Deactivated 27
1.12 SwissSalary Direct 27
1.12.1 SwissSalary Direct | Rollout Date 27
1.12.2 SwissSalary Direct | Income Tax Certificate 27
1.12.3 Direct | Report: Allocation 28
1.12.4 Direct | Vacations 28
1.12.5 Report in Employee File | Direct Upload 28
1.12.6 Security Filter | People Removed 28
1.12.7 Security Filter | Direct Synchronization 28
1.13 SwissSalary Construction 29
1.13.1 Security Filter | Baubit Import 29
1.14 Technical Information 29
1.14.1 Tenant Registration | Check Payline Items 29
1.14.2 Employee List | Table view 29
1.14.3 Security Filter | Performance 29
1.14.4 Security Filter | Dependency on Microsoft QR-Bill 29

1 Update 5068.000 | User

1.1 Update 5068.000 | Introduction

Dear SwissSalary Customers
Dear SwissSalary Partners

We are pleased to present the manual for SwissSalary **Update 5068.000**, dated November 12, 2026. This manual also includes the tasks from Quality Releases 5067.001 through 5067.005. Once you install this update, you will be running the latest version of SwissSalary. In addition to great new features and improvements in SwissSalary, we have also further developed our bidirectional interfaces with our existing add-ons: SwissSalary Direct, SwissSalary EasyRapport, SwissSalary Budget, and KLE.

We have sent an overview of the most important changes in our newsletter, and you can find it at any time in the magazine section of our website, swisssalary.ch.

IMPORTANT NOTES

❑**Prerequisite**
If your Dynamics 365 partner has made company-specific changes to your SwissSalary standard objects, you must contact your Dynamics 365 partner before installing the objects. Please make sure you are always working with the latest version. We support the latest version of SwissSalary and the version immediately preceding it.

❑**Comprehensive Update with All Available Objects**
The major updates are released approximately in April/May and October/November, in line with the Microsoft Dynamics 365 Business Central release cycle.

❑**SwissSalary 365 | Microsoft Dynamics 365 Business Central | Microsoft SaaS Cloud**
The SwissSalary 365 app is always running the latest version of Microsoft Dynamics 365 Business Central as well as the latest version of SwissSalary. The app can be updated with just a few clicks directly through the Admin Center (see our training video).

The SwissSalary **Update 5068.000** is available for the following Business Central versions (on-premises/private cloud):
- Dynamics 365 Business Central 2026 Wave 2 - Version 29 (AL)
- Dynamics 365 Business Central 2026 Wave 1 - Version 28 (AL)
- Dynamics 365 Business Central 2025 Wave 2 - Version 27 (AL)

In SaaS (Microsoft Public Cloud), we always support the latest version; therefore, we are releasing the SwissSalary Update 5068.000 only for BC 29. Please note that existing sandboxes must also be migrated to the latest BC version in order to install 5068.000.

It will be possible to import the 2027 IT rates by downloading them from our partner portal and importing them via the payroll master data. This means that the 2027 IT rates can also be imported for NAV/BC versions that no longer receive updates.

Customers are responsible for implementing SwissSalary updates. Our support team or your Dynamics 365 partner can assist you if needed. This responsibility also applies to SwissSalary365 (Cloud), and SwissSalary does not perform updates automatically.

Stay tuned for Release 5068.000.

Your SwissSalary Team

1.2 Pay Raise

1.2.1 Pay Raise | Reasons

Task #10530 | 5068.000

The reason field can be displayed in the journal lines and can therefore also be exported to Excel. Existing text is carried over to the posted pay raise.

1.2.2 Pay Raise | List of Pay Raises

Task #13360 | 5067.005

The "Pay Raise List" report takes Allocation Group filters into account as intended.

1.2.3 Pay Raise | Pay Raise Journal

Task #10525 | 5067.003

The Salary code is displayed by default in the pay raise journals.

1.2.4 Pay Raise | Columns locked

Task #10529 | 5067.001

To give managers a better overview when distributing pay raises, the "Last Name," "First Name," and "Employee ID" fields are displayed and pinned.
All columns up to and including the "Last Name" field are pinned. If the "Last Name" column is moved far to the right using the "Customize" feature, usability may be affected.

1.2.5 Pay Raise | Status Change

Task #9897 | 5067.001

An HR user can change the status from "Approved" back to "Pending Approval." This is not possible with supervisor permissions if the "Department Permissions" field is enabled in the SwissSalary user settings.

1.2.6 Pay Raise | Direct Upload

Task #8410 | 5067.003

With Direct Mail, you can initiate the mailing of pay raise letters using the "Validity Date" or "Serial Number" filters.

1.2.7 Pay Raise | Error message Direct

Task #10715 | 5068.000
Task #12209 | 5068.000

Pay raise letters can be sent to employees via SwissSalary Direct. Employees who do not receive a pay raise will not receive a letter in SwissSalary Direct. The system no longer triggers an error message when there are employees who do not receive a pay raise.

1.2.8 Pay Raise | Users without access

Task #8484 | 5067.005

A correction has been made so that a user who is not listed in the SwissSalary user table cannot view data in the corresponding client. Similarly, a user who is not listed in the client cannot approve journals.

1.3 Employee

1.3.1 Foreign ZIP Code | Error Message

Task #11961 | 5067.005

Foreign ZIP codes can be managed and processed using TimeMachine without triggering an error message.

1.3.2 Employee card | Post Tax City

Task #12327 | 5068.000

For foreign residential addresses, the tax jurisdiction of the place of employment is suggested and adopted. A change in location resulted in a change in the tax jurisdiction; this has been corrected.

1.3.3 Employee card | Allocation Group and Department

Task #12179 | 5067.002 [1.5067001.2002.0]

Applies exclusively to customers with on-premises installations:
In SwissSalary version 5067.000, an error message appeared indicating a lack of permissions when attempting to change the department or allocation group for an existing employee. This error has been fixed.

1.3.4 Employee card | Posting Group TimeMachine

Task #11891 | 5068.000

With the implementation of TimeMachine (future adjustments only) in the "Posting Group" field, it is now possible to record changes that will take effect in the future. If the change affects the pay code or absence entitlement, these fields must be updated at the appropriate time.

1.3.5 Employee card | IT rate TI

Task #14471 | 5068.000

The new Income tax rates for the Canton of Ticino (W, X, Y, and Z), which will take effect in 2027, are now available and can be used.

1.3.6 Security Filter | Insurance and Benefit Coverages

Task #12092 | 5067.001

In SwissSalary version 5067.000, changes were made to the security filters that were causing errors for users with Allocation Group.
Benefit entitlements were not being inherited from the Allocation Group default settings and HR templates when creating new employees. This issue has been resolved.

1.3.7 Employee Dossier | Paycheck

Task #13267 | 5067.005

The Paycheck now includes the option to save it to the Employee Dossier. If a payroll run is canceled, any saved Paycheck report is removed from the file.

1.3.8 Infobox | Employee Dossier

Task #11451 | 5068.000

The sorting order in the Employee Dossier info box has been adjusted. The document that was most recently uploaded to the dossier is now displayed at the top. To keep the list sorted in this order, you must refresh the view after importing or reload the personnel list.

1.4 Payroll

1.4.1 Payroll | No Place of work specified

Task #13110 | 5068.000

When processing payroll, the Place of work is a required piece of information for correct processing. If no Place of work is on file for an employee, a more detailed message is now displayed.

1.4.2 Payroll | Validity of the Income Tax Rate

Task #10765 | 5068.000

Bei quellensteuerpflichtigen Personen wird beim Lohn abrechnen geprüft, ob für die aktuelle Periode gültige QST-Tarife vorhanden sind. Sind keine Tarife für die aktuelle Periode gültig, wird eine Warnung ausgegeben.

1.4.3 Payroll | Error Message When Making a Payment After an Employee's Resignation

Task #12566 | 5067.003

For an employee not subject to withholding tax who is paid an hourly wage, an error message appeared when a payment was made after the employee's departure. This occurred only if the "Additional Income" field was checked. Additional income is relevant for the calculation only for employees subject to withholding tax. If the field is checked, it no longer triggers an error message for employees not subject to withholding tax.

1.4.4 Person with Foreign Currency | Exchange Rate

Task #12589 | 5068.000

If an employee is paid in a foreign currency and an amount was entered in the reporting journal, the exchange rate was always determined at the time of entry. If the exchange rate was updated in the exchange rate table only after the reporting journal entry was made, it was possible that the "Calculate Pay" function did not use the current rate for conversion to the client currency. Now, the exchange rate is always determined at the time of payroll processing. To do this, we use the "Payroll " date from the request page and compare it with the start date of the exchange rate entries. The exchange rate used is always the one listed as valid in the exchange rate table as of that date.

1.4.5 Reporting Journals | Amount, Quantity, or Valuation Blocked

Task #13100 | 5068.000

For each salary type, you can specify whether the number, amount, and rate should be locked for manual entry. Previously, an error message appeared when a user attempted to enter a value in a column that was locked for manual reporting.
Now, the field is not editable, and entry is not possible. An error message is no longer displayed.

1.4.6 TapBoard | Performance

Task #13013 | 5067.004 [1.5067003.2002.0]

Performance has been improved, particularly in TapBoard.

1.4.7 TapBoard | Batch Entry

Task #13370 | 5067.005

The TapBoard previously had two "Batch Entry" features. One of them has been removed.

1.4.8 Security Filter | Tapboard

Task #11684 | 5067.001 [1.5067000.2002.0]

In SwissSalary version 5067.000, changes were made to the security filters that caused errors for users with Allocation Group.
The TapBoard was no longer displayed and could no longer be used. This issue has been resolved.

1.4.9 Security Filter | TapBoard Display Error

Task #13556 | 5067.005

For a user with a Allocation Group filter, the rows were not loaded in TapBoard. Additionally, an error message appeared when switching between personnel numbers. This issue has been resolved.

1.4.10 Security Filter | Tapboard Dimensions

Task #12160 | 5067.002 [1.5067001.2002.0]

In SwissSalary version 5067.000, changes were made to the security filters that caused errors for users with allocation group filter.
It was not possible to add new dimensions in TapBoard. This issue has been resolved.

1.4.11 Security Filter | Tapboard hidden rows

Task #12163 | 5067.002 [1.5067001.2002.0]

In SwissSalary version 5067.000, changes were made to the security filters that caused errors for users with allocation group filter.
It was not possible to add hidden rows from the EasyRapport group in TapBoard. This bug has been fixed.

1.4.12 Security Filter | Withholding Tax Adjustment

Task #12603 | 5067.003 [1.5067002.2007.0]

In SwissSalary Version 5067.000, changes were made to the security filters that caused errors for users with Allocation Group filters.

If a user with a Allocation Group filter ran a payroll cycle that included retroactive adjustments to withholding tax rates, the previous deductions were not credited. This error has been fixed.

1.4.13 Security Filter | Social security deductions

Task #11745 | 5067.001 [1.5067000.2002.0]

In SwissSalary version 5067.000, changes were made to the security filters that were causing errors for users with a Allocation Group filter.
For payroll runs processed by a user with a Allocation Group filter, social security deductions were not calculated correctly. This issue has been resolved.

1.4.14 Security Filter | Single Parent Family

Task #11781 | 5067.001 [1.5067000.2004.0]

In SwissSalary version 5067.000, changes were made to the security filters that were causing errors for users with a Allocation Group filter.
Users with a Allocation Group filter were unable to process payroll if employees subject to withholding tax were to be processed using rate H. This issue has been resolved.

1.4.15 SecurityFilter | Post Payroll

Task #13138 | 5067.005

If a user posted the payroll run using a Allocation Group filter, this triggered an error message. This has been corrected.

1.5 Reports

1.5.1 Plausibility Check | Document Date

Task #4632 | 5068.000

The document date is now printed correctly on the Plausibility Check.

1.5.2 Management Rapport | Selection field

Task #7912 | 5068.000

A third selection field can now be selected on the Management Rapport.

1.5.3 Management Rapport | Time Balances

Task #5992 | 5068.000

The Management Rapport now displays the time balances from the processed payroll run. This means that a Management Rapport can also be created retroactively with the corresponding time balances based on this payroll run.

1.5.4 Employee Salary Statement | Time Types

Task #10591 | 5067.005

If the "Employee Salary Statement A4Q" report was not run with the end date of December 31, 20xx, the time types were not correctly reported for the respective month.
This has now been corrected.

1.5.5 Rate Fluctuation List | Reasons for Departure

Task #11889 | 5067.001

With version 5067.000, the ability to store translations for reasons for leaving was added. This caused an error message to appear in the turnover list if no translations had been stored. This issue has been resolved.

1.5.6 AHV Annual Statement | Withdrawal and Re-enrollment Within a Month

Task #9254 | 5068.000

If an employee's termination and rehire are processed in the same month, the AHV wage totals are correctly reported on the AHV wage statement and correctly submitted to the compensation office.

1.5.7 Benefit Statement | several jobs

Task #13586 | 5068.000

Employment periods for multiple periods of employment are printed correctly on the benefit statement.

1.5.8 Benefit Statement | Empty Payroll Run in the Month of Termination

Task #13045 | 5068.000

If no payroll-related data was processed in the month of termination and payroll was not processed until after the termination, these values were missing from the benefit statement.
Payroll amounts processed as back pay are correctly reported on the benefit statement even if no payment was made in the month of termination.

1.5.9 Salary certificate as a PDF | Error message

Task #12200 | 5068.000

When the "Salary cedrtificate" (PDF) report is run, the pay stubs are saved in a ZIP folder. Previously, an empty error message was displayed when the filter criteria were invalid. This message has been made more descriptive, and the user is now informed that no files can be generated.

1.5.10 SecurityFilter | Family Allowance Statement

Task #12882 | 5067.005

The Family Allowance Statement takes into account the filter for the Allocation Group stored for the user and displays only the employees who meet the filter criteria.

1.5.11 Security Filter | Mail Merge

Task #12284 | 5068.000

Creating a Mail Merge now works again with the payroll area filter. Connections have been reestablished.

1.5.12 Security Filter | Absences Mirror

Task #14077 | 5068.000

When the "Absence Report" was generated, it returned no results for a user with a payroll area filter applied. This has been corrected.

1.5.13 Reports | Portrait Layout

Task #13486 | 5068.000
Task #13536 | 5068.000
Task #13537 | 5068.000

Some reports were previously supported in both portrait and landscape orientation. However, the portrait layout had limited usability, as the data is displayed much more user-friendly in landscape orientation. The portrait report layout has therefore been removed for the reports listed below.

- Employee Salary Statement A4H
- Absence List A4H
- Statistics: Employee List A4H

1.5.14 Report | Salary Type List

Task #13538 | 5068.000

The report had not been maintained in recent years, and changes such as the transfer of social insurance data to the Benefits module were not reflected in it. The column widths were too narrow, and a legend was required to understand the report. The report was therefore removed.

1.5.15 Evlauation of time | Absence Entitlement Without Pay Types

Task #12756 | 5068.000

Due to recent changes, the "Evaluation of time" report could no longer be run if no salary types were specified in the corresponding absence entitlement. This has been corrected.

1.6 Salary Declaration

1.6.1 Salary Declaration | Action Declare Salary

Task #13125 | 5068.000

The "Salary Declaration" function for submitting new ELM declarations (AHV, FAK, UVG, UVGZ, KTG, BVG, IT, cross-border workers, Salary certificate, and statistics) is now also available on the overview page for Salary Declaration.

1.6.2 Location ID, Municipality Number | Foreign Locations

Task #4525 | 5068.000

Location IDs with a country code other than 'CH' are not transmitted in ELM. Location IDs longer than 4 characters are also not transmitted in ELM; corrections can be made in the ZIP Code Registry.

1.6.3 Declare Salary | E-Mail

Task #12579 | 5068.000

When entering data for the ELM Salary Declaration, the checks defined by Swissdec for the responsible person's email address are performed as the information is entered. Email addresses with an invalid format are detected and displayed as errors.

1.6.4 Declare Salary | FAK Total

Task #9409 | 5068.000

In the annual salary report submitted to the Family Compensation Funds, a canton was not included if no Family Compensation Fund salary total had been reported for that calendar year.
The location—or Family Compensation Fund canton—then had to be deregistered with the Family Compensation Fund.
This has been corrected, and now, for a canton with no salary total in the relevant calendar year, a salary total of 0.00 is reported.

1.6.5 Declare Salary | Validity of Contracts

Task #10001 | 5068.000

When Declare Salary, the contracts valid for the reporting period are displayed. The data is transmitted to the insurance provider valid for the selected period.

1.6.6 Declare Salary | Salary certificate

Task #10238 | 5068.000

If, when reporting wages, the Salary certificate are submitted only to cantons that are not ELM recipients for wage statements, the reports will remain in "in progress" status. Going forward, a message will be displayed indicating that no wage declarations are available for the requested period.

1.6.7 Declare Salary | IT EMA

Task #12834 | 5068.000

The Declare Salary has been updated so that an exemption from withholding tax in the current month is reported to the income tax authority as a termination notice.
If the residence permit is changed to a "Settlement Permit C" and the date of receipt is entered in the corresponding date field in the withholding tax register, this is reported as the reason.

1.6.8 Income Tax | Annual Corrections by Canton

Task #11731 | 5067.004

The process for submitting retroactive Income tax adjustments in cantons with annual reporting has been revised. Payroll reports now include a table titled "Annual Income Tax Items" for each canton. This table can also be accessed via the employee list for an individual employee. For retroactive tax rate adjustments, the deduction amounts are calculated and reported proportionally in the XML file for both the current month and the months to be corrected.

1.6.9 Statistics Update | Workplace with Lessons

Task #10533 | 5067.000

Weekly hours and lessons are recorded in the "Work Location" settings. If only the "Lessons" column had been filled in for a work location, an error message would appear when the statistics were submitted. This has been fixed.

1.6.10 EMA | Resignation date

Task #11931 | 5067.002

In the EMA (Enrollment/Change/Withdrawal) records, a validity date for withdrawals was not transmitted correctly. This has been corrected.

1.7 Interfaces

1.7.1 UKA 24.1 | Employee Absences

Task #8956 | 5068.000

This update includes the new version of the UKA interface 24.1 for employee absences.

1.7.2 UKA 24.1 | Organizational Units

Task #8956 | 5068.000

This update includes the new version (24.1) of the UKA interface for organizational units.

1.7.3 UKA 24.1 | Salary Type Assignment

Task #11577 | 5068.000
Task #8953 | 5068.000

This update includes the new version 24.1 of the UKA interface for personnel data. This enables the assignment of salary types to General Data.

1.7.4 UKA 24.1 | Assignment Fields for Payroll Setup

Task #10994 | 5068.000

New fields were added to the salary type master so that the new version (24.1) of the UKA interface can be implemented.

1.7.5 UKA 9.1 and 24.1 | Number of children

Task #12136 | 5067.003

The number of children was not included in the UKA interface file "Payroll Setup." This error has been fixed.

1.7.6 GastroSocial | Report Multiple BVG Codes

Task #13782 | 5068.000

The GastroSocial export has been expanded so that it now takes into account all BVG codes assigned to the employee. As a result, the coordinated salary and employee contributions are accounted for in REC01 across all relevant BVG codes. For example, when contributions are broken down into risk and savings contributions, the contributions associated with additional BVG codes are also included in the export.

1.7.7 GastroSocial | REC01 Field Adjustments

Task #13782 | 5068.000

The export of the PK standard file has been adjusted in the following areas:
Payroll number: The payroll number is exported in the specified 8-digit format.
Part-time employment rate: The employment rate is now displayed in field 13.
Supplementary codes: Supplementary codes continue to be output as 6-digit codes. If the primary BVG plan used is uniquely identified by the letter A or B, this letter is appended to the supplementary code, for example, 100000A or 100000B.

1.7.8 SAP Excel COFI Export | Cost Center

Task #10434 | 5068.000

In the SAP (Excel) Financial Accounting export, cost centers can now also be exported for balance sheet accounts. This is controlled by the "Dimension Split for Balance Sheet Accounts" setting in the payroll master data. If this setting is disabled, cost centers will continue to be exported only for income statement accounts, as before.

1.7.9 Financial Interface | Target System in the Allocation Group

Task #13781 | 5067.005

If a customer-specific financial accounting interface had been created and integrated into the dropdown menu for the "Target System" financial interface in the Allocation Group, the user's own interface was no longer visible. The setting itself was not lost; the selection option was simply no longer visible in the dropdown menu. This validation error has been corrected, and the customer-specific values are once again available as options.

1.7.10 Open Interface | Error Log

Task #11748 | 5067.001 [5067.000.2002.0]

Update 5067.000 caused an error message to appear when using the open interface. This error message has been fixed in a hotfix.

1.7.11 SmartPort | Accept Changes Automatically

Task #12451 | 5068.000

In the SmartPort Setup, you can define one or more domains for which changes are to be automatically accepted.

1.7.12 SmartPort | SIMIC No.

Task #10940 | 5067.001

The Smartport import now also accepts six-digit numbers with a check digit (xxxxxx.x).

1.7.13 SmartPort | Working Group

Task #12455 | 5067.005

An employee's Working Group can now be imported or updated via SmartPort. The WorkingGroupCode field is available for this purpose in the SmartPort schema. Empty values are supported; if a workgroup code is invalid, a corresponding import error message is displayed.

1.8 Administration

1.8.1 Rollencenter | Adjustments

Task #14538 | 5068.000

Terminology has been updated and the layout standardized.

1.8.2 Organization | System Initialization

Task #12435 | 5068.000

System initialization is once again available via the "Organization" table and can be performed as usual.

1.8.3 Liste Salary Type | Shortcut

Task #13577 | 5068.000

In the salary type list, you can press SHIFT+CTRL+O on the selected salary type to open the setup for subsequent salary types.
The key combination CTRL+O opens the client overview on the right-hand side.

1.8.4 Working Group | Presentation

Task #6703 | 5068.000

The working group adjusted the presentation for Monday and Friday to match that of the other days of the week.

1.8.5 Allocation Group | Reporting Journal for Daily Allowances KLE

Task #12656 | 5068.000

A reporting journal for daily allowance processing can be assigned to each Allocation Group.

1.8.6 Head of the Authorization Department | TimeMachine and Salary Entry

Task #12110 | 5068.000

With department head permissions, the TimeMachine entries are correctly filtered and displayed for the respective person.

1.8.7 Period Start Date | Working Group

Task #7711 | 5068.000

If a Allocation Group with a period start date ≥1 is used and the work group is changed, the work group was applied to the wrong month.
This issue has now been corrected.

1.8.8 Placeholder | Title, First Name

Task #11116 | 5068.000

You can now also include a placeholder for first and last names in the salutation.

1.8.9 Payroll Setup | Swissdec Setup

Task #11831 | 5068.000
Task #11832 | 5068.000

The Swissdec Setup in the Payroll Setup have been redesigned to be clearer and more user-friendly. Fields that are used less frequently have been moved to the "Show More" section to simplify the view.
All labels in the Swissdec settings are consistent with those used by Swissdec.

1.8.10 Payroll Setup | Swissdec Setup - Basic License

Task #11515 | 5068.000

For customers with a Basic license, the KLE and EPO (E-Profile) features are hidden in the Swissdec features. These require a SwissSalary Plus license.

1.8.11 Payroll Setup | SUA Notifications

Task #11829 | 5068.000

In the Swissdec Setup, the user is notified of the certificate's status:
- No SUA certificate has been issued for this company
- You have a valid certificate
- The certificate must be renewed within the next 6 weeks
- The certificate has expired. You must start the SUA process over from the beginning

1.8.12 Benefit | Payroll Runs Across Periods

Task #10567 | 5068.000

The benefit allocation entries now reflect a specific period—that is, a "from" and "to" date based on the payroll run. As a result, payroll runs—for example, those for members of the board of directors—can now be correctly processed even when they span multiple months.

1.8.13 Benefit | fixed amounts

Task #5653 | 5068.000

It is now possible to create a Benefit plan with fixed contributions that also takes into account the work schedule and the calculation of enrollment and withdrawal.

1.8.14 Benefit | Setting Inherited Benefits to Inactive

Task #12604 | 5068.000

An inherited benefit that cannot be assigned can be set to inactive. Once set to inactive, the benefit will no longer be calculated.
Even after being set to inactive, the benefit can still be analyzed (reports).

1.8.15 Benefit | Typ delete

Task #13578 | 5068.000

Unused Benefit types can be deleted. The corresponding translations will also be deleted.

1.8.16 Benefit | Deleting types is restricted

Task #12730 | 5068.000

Benefit types cannot be deleted:
- by users with payroll area filters
- if the benefit type is assigned to a benefit
- if there are wage items for the benefit type

If a client group has been set up, this check is performed across all clients.

1.8.17 Security Filter | Benefit

Task #12543 | 5068.000

Users with a Allocation Group filter cannot delete Benefit contract lines, Benefit rates, Benefit limits, or Benefit eligibility thresholds if payroll runs for other Allocation Group already exist.
If a Benefit is set up without a "Valid From" date and payroll items already exist, the Benefit cannot be deleted.

1.8.18 SecurityFilter | CrossCompany TableViewer

Task #2586 | 5068.000

The "Cross-Company Table Viewer" function is available again and applies the stored Allocation Group filters in accordance with the defined authorizations.

1.8.19 SUA | Timestamp

Task #11830 | 5068.000

The following columns can now be displayed in the certificate list: "Created on" and "Modified on." The "Created on" field displays the date the certificate was created; for a valid certificate, this date cannot be more than three years in the past. The "Modified on" field displays the date the certificate was renewed.

1.8.20 SUA | Certificate Lock Password

Task #11834 | 5068.000

The suspension password can now be stored in the certificate list. This password is required if the company wishes to have the SUA certificate suspended.
The process for suspending the SUA certificate requires contacting Swissdec directly, during which this password will be requested.
After the SUA certificate has been revoked, the company must repeat the registration process to obtain a new SUA certificate.

1.8.21 SUA Certificate | Reset Password

Task #13708 | 5068.000

The tooltip provides information about the "Revoke Password" field, specifically: "Specifies the lock password used for corporate authentication when a certificate needs to be revoked. To initiate the revocation process, contact Swissdec directly."

1.9 KLE

1.9.1 Security Filter | Create KLE Case

Task #12198 | 5067.002 [1.5067001.2002.0]

In SwissSalary version 5067.000, changes were made to the security filters that caused errors for users with allocation group filter.
Users with an allocation group filter could not create KLE cases if a KLE case had not already been created for that person.
Now, a user with an allocation group filter can once again create a new KLE case, regardless of which user created the previous KLE case.

1.9.2 KLE | Number of Injuries

Task #4201 | 5068.000

When reporting an accident, a maximum of 3 injuries may be recorded. If the user attempts to record a fourth injury, they will be notified that this is not permitted.

1.9.3 KLE | Transfer Daily Allowance

Task #10924 | 5068.000

When the daily allowance record is transferred to the Management journal, the following fields are copied into the Management journal:
Source ID -> Unique identification key of the data record
Source ID Type -> KLE Daily Allowance
Two new fields have been added to the daily allowance record: Journal Entry Yes/No and Payroll Item Yes/No.

This establishes a direct link between the daily allowance in the KLE case and the reporting journal or payroll items as soon as the daily allowance has been processed in a payroll run.
Clicking on "Journal Entry" or "Payroll Item" takes you directly to the corresponding reporting journal or to the posted payroll items.

1.9.4 KLE | Digitalization Scope

Task #4767 | 5068.000

If daily benefit statements are not submitted via KLE Case because the insurance company has not implemented the settlement option, the user can manually enter the daily benefits via the "Insurance Claim" screen.
The buttons on the KLE Case screen are shown or hidden depending on the extent of digitization.
Dialogs requested by the insurance company are sent exclusively back to that insurance company.

1.9.5 KLE | Daily Benefits Paid to Third Parties

Task #7645 | 5068.000

The portion paid to third parties, such as another insurance company, is shown on the daily benefit statement.

1.9.6 KLE | Accident Report

Task #8068 | 5068.000

The insured person's private phone number is printed on the accident report form.

1.9.7 KLE | Negative hours

Task #11241 | 5068.000

Any negative hours on the "ACTUAL Time" time type are set to 0 for the transmission of the annual salary to KLE.

1.9.8 KLE | Claim Report

Task #12268 | 5068.000

The insured person's private phone number is printed on the claim report.

1.9.9 KLE | Claim Report Function Name

Task #10953 | 5068.000

When generating the "Claim Report for Illness and Accident," the entry was previously taken from the 'Occupation' field on the personnel record. This has been corrected, and the entry is now taken from the "Job Title" field.

1.9.10 KLE | Stories are complete but have not been submitted

Task #7254 | 5068.000

In the KLE Case List, you can display the following column: "Complete but not submitted." This field shows the number of complete stories that have not yet been submitted. It is worth reviewing these cases because they may be blocked from submission—for example, due to an attachment that is too large.

1.9.11 KLE | Display Dialog Text

Task #11073 | 5068.000

If the entire dialog text is not displayed, you can click to view it in a separate view box.

1.9.12 KLE | Overview of Daily Allowances Received and Refunds

Task #3972 | 5068.000

The "Number of Daily Allowances" column is displayed by default in the KLE Case list. Clicking on the field opens a list of all daily allowance records for the selected KLE Case. The filter on the KLE Cases can also be removed so that all daily allowance records to which the user has access are displayed (settlement group filter).
On the KLE Case card, you can use the "Related" option to open the list of all daily allowance entries for the KLE Case or the list of all repayments. Here, too, the filter on the KLE Cases can be removed so that all daily allowance entries to which the user has access are displayed (settlement area filter).

1.10 SwissSalary Budget

1.10.1 Budget | Forecast

Task #11320 | 5067.001

In the SwissSalary Budget, forecast items for new hires and vacancies are now calculated by payroll accounting only starting from the start date.

1.10.2 Budget | Forecast Benefit Assignments

Task #14385 | 5068.000

When calculating the forecast, benefit allocation entries are no longer posted.

1.10.3 Budget | Employment % Column

Task #4228 | 5068.000

The current percentage of full-time equivalents can now be displayed as a column in the budget schema.

1.11 SwissSalary EasyRapport

1.11.1 EasyRapport | Time Information

Task #12135 | 5067.003

In EasyRapport, under "Get EasyRapoprt Entry" and "Transfer," time entries were sometimes processed incorrectly during certain workflows. This has been corrected so that hours and time values are retained correctly and 24-hour entries are no longer generated.

1.11.2 EasyRapport | Import Table

Task #11965 | 5067.003

If an entry with an amount from the EasyRapport import table was transferred to the reporting journal and a rate was specified for the corresponding salary type, the reporting entry was incorrectly deleted if no quantity was provided. This behavior has been corrected.

1.11.3 SecurityFilter | EasyRapport Transfer

Task #13362 | 5067.005

If a user ran the EasyRapport Transfer with a Allocatin Group filter, an error message was displayed for entries already present in the import table that had been modified by employees in the EasyRapport web view. This has been fixed, and the behavior is now identical to when a user runs the transfer without a Allocatin Group filter. The data record is overwritten with the new values.

1.11.4 Security Filter | EasyRapport Employee Deactivated

Task #11942 | 5067.001

In SwissSalary version 5067.000, changes were made to the Allocation Group filter.
As a result, employees were deactivated for EasyRapport when a user performed the transfer using the Allocation Group filter. This issue has been resolved.

1.12 SwissSalary Direct

1.12.1 SwissSalary Direct | Rollout Date

Task #12298 | 5067.002 [1.5067001.2003.0]

Although registration with SwissSalary Direct had been completed, the registration code continued to appear on the payslip because the rollout date had not been entered into the employee data. This error has been fixed.

1.12.2 SwissSalary Direct | Income Tax Certificate

Task #12265 | 5067.004 [1.5067003.2000.0]

The printing and/or submission of the Income tax confirmation to SwissSalary Direct can be automated for all employees. For unregistered employees, the report is displayed so that it can be printed and delivered to the employee through the usual channels.

1.12.3 Direct | Report: Allocation

Task #4362 | 5068.000

If the "Report ID" field is filled in, the "Synchronize with Direct" function (in the SwissSalary document management setup) cannot be edited. The reason for this is that if a default report is linked via the report assignment, the automatic synchronization with SwissSalary Direct must be disabled; otherwise, this will cause a conflict.

1.12.4 Direct | Vacations

Task #11442 | 5068.000

When sending a document to all employees via SwissSalary Direct, an error message would appear if there were personnel records with the "Vacancy" status in that client. This error has been corrected.

1.12.5 Report in Employee File | Direct Upload

Task #14073 | 5068.000

The "Report in Personnel File" feature already allowed users to generate a standard report and upload it to the personnel file.
The subsequent optional upload to the Direct Portal resulted in a 500 error. This has been corrected. Synchronization and uploads to the Direct Portal now work as of this version.

1.12.6 Security Filter | People Removed

Task #13377 | 5067.004

If a user in SwissSalary 365 made a change to a personnel record without applying a Allocation Group filter, and another user performed the SwissSalary Direct synchronization with a Allocation Group filter applied, the employee whose record was edited was deleted from the Direct Portal. This bug has been fixed.

1.12.7 Security Filter | Direct Synchronization

Task #11888 | 5067.001 [1.5067.001.2000.0]

With SwissSalary version 5067.000, changes were implemented to the Allocation Group filters. This affected synchronization with SwissSalary Direct.

If a Allocation Group filter is set for a user, that user will only see employees from the corresponding Allocation Group. However, if employees outside these payroll areas make changes to a person's information—such as their address—and these changes are ready to be synchronized, the system cannot find these employees because it lacks access. As a result, these employees are marked as deleted in the SwissSalary Direct portal.

When logging in, the user is then recognized as a new user in Direct and must re-register. The documents are also no longer visible.

With hotfix 5067.001, a clear separation of Allocation Group is possible, and users can no longer be deleted due to changes made by users in other Allocation Group.

1.13 SwissSalary Construction

1.13.1 Security Filter | Baubit Import

Task #11987 | 5067.002

In SwissSalary version 5067.000, changes were made to the security filters that caused errors for users with allocation group filter.
When importing BauBit data, the “Journal batch name" column was not fully completed. This error has been fixed.

1.14 Technical Information

1.14.1 Tenant Registration | Check Payline Items

Task #12888 | 5067.003

When performing an on-premises to SaaS migration and the user performing the migration is not the first user in SwissSalary, no payroll entries are displayed. As a result, the ‘SalaryEntry.IsEmpty()’ check which we run before importing the system initialization data did not work correctly. This has been fixed, and the ‘SalaryEntry.IsEmpty()’ check now works correctly in this scenario as well.

1.14.2 Employee List | Table view

Task #11902 | 5067.002

In SwissSalary version 5067.000, the employee list could no longer be opened in table view via the page review feature. A FlowField has been corrected, and the table view can now be accessed again.

1.14.3 Security Filter | Performance

Task #11896 | 5067.001 [1.5067.001.2000.0]

In SwissSalary version 5067.000, changes were made to the Allocation Group filters.
As a result, it took a long time to open the employee list or the employee profile. This issue has been resolved, and performance has been restored.

1.14.4 Security Filter | Dependency on Microsoft QR-Bill

Task #11694 | 5067.001 [1.5067000.2005.0]

In SwissSalary version 5067.000, a dependency was created between SwissSalary and the standard Microsoft app “QR-Bill Management for Switzerland.” This hotfix has removed that dependency.