SwissSalary Learn

Benefits

Microsoft

swissdec certified plus

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1 Benefit Settings overview

Benefit settings can be retrieved via Payroll Setup.
Benefit settings and Benefit contracts can be selected to begin with.

An overview of all defined benefits is displayed on the start page.
The details of individual settings can be displayed on the details page.

1.1 Benefit Details

1.1.1 General

Fieldname	Description
Code	Customizable code
Description	Customizable benefits description
Language-dependent label	Display of description translation entered based on user language
Type	Benefit type selection. Benefit type defines the base wage type referenced for this benefit calculation. A benefit type is only required for calculation if the calculation matrix is based on a percentage and/or if limits are taken into account for calculation. One benefit type can be used for multiple benefits.
Calculation order	The order of calculation can be defined individually
Benefit application	If an existing benefit is selected, the settings of this benefit will be adopted. The calculation is made using the same benefit type, wage type and limits. The rates and employee and employer salary types can be controlled individually.
Entitlement to benefits	Entitlements to benefits can be freely defined and assigned to the corresponding benefit. This selection is displayed and assigned accordingly in the Employee card, Payroll area and Employee templates.

1.1.2 Salary types

Fieldname	Description
Salary Type	The Salary type is calculated depending on the entitlement to benefits and the limits defined in the benefit. A Salary type input is only needed if the benefit is calculated using a percentage or if limits need to be taken into account.
Exemption Salary Type	Definition of the Salary type based on which the amount is calculated that is not included in the benefit due to the defined limit.
Employee Salary Type	Definition of the Salary type used to settle the benefit on the employee side. All Salary types of the 'Allowance', 'Expenses' and 'Deductions' types can be selected. The 'Calculated' calculation type must be set for these Salary types.
Employer Salary Type	Definition of the Salary type used to settle the benefit on the employer side. All Salary types of the 'Employer' type can be selected. The 'Calculated' calculation type must be set for these Salary types.

1.1.3 Contract Lines

Fieldname	Description
Valide from	Definition of the date from which the selected contract is valid for this benefit
Contract No.	Contract selection
Contract Description	Contract description view

1.1.4 Rates

Fieldname	Description
Valide from	Definition of the date starting from which the selected rate is valid
Rule Code	Selection of a rule for using an approach/amount only for certain calculations
Rule Description	Display of the selected rule description
Rate Type	Rates can be stored in fixed value or percentage
Employee	The rate used to calculate employee salary type depending on benefit obligation and rule
Employer	The rate used to calculate employer salary type depending on benefit obligation and rule

1.1.5 Limits

Fieldname	Description
Valid from	Definition of the date starting from which the limit is valid
Lower Limit (Annual)	Definition of the lower limit; value 0.00 means that it is unlimited
Upper Limit (Annual)	Definition of the upper limit; value 0.00 means that it is unlimited

2   Benefit Types

2.1   Benefit Types

Benefit type defines the base salary type referenced for benefit calculation. A benefit type is only required for benefits that have a calculation matrix defined based on percentage and/or calculation with limits taken into account.

One benefit type can be used for various benefits.

3 Benefit Coverage Setup

3.1 Coverage Setup

Entitlement to benefits can be freely defined. You can define for each entitlement to benefits code whether the costs are borne by employer or by employee. This definition influences, among other things, the calculation of employee and employer salary types for the correspondingly assigned benefit.

If employer assumes employee's share of benefit, this can be defined accordingly by selecting "Employer" in the employee benefit obligation.
If employee assumes employer's share of benefit, this can be defined accordingly by selecting "Employee" in the employer benefit obligation.

Using sequence definition, automated code changes can be configured based on selectable rules. One example is automatic change due to reaching an age limit.

Fieldname	Description
Code	Customizable code
Description	Customizable description
Employee Liability	Definition of whether the employee is obliged/entitled to benefits. The choices include: - not liable - employee - employer
Employer Liability	Definition of whether the employer is obliged/entitled to benefits. The choices include: - not liable - employee - employer

Fieldname	Description
Code	Customizable code
Description	Customizable description

Tabellenfelder Benefit Sequenzdefinition Leistungscodes

Fieldname	Description
Code	All codes defined for the selected coverage type are available for selection
Next Code	Definition of the code to be automatically assigned to the employee depending on a rule. For example, automatic code change when certain age limit is reached.
Rule	Selection of the rule that controls automatic code change

3.2 Code change sequence definition

Using sequence definition, automated code changes can be configured based on selectable rules.
All codes of the selected coverage type can be selected. Automatic code change can be initiated for each code using a user-defined rule. One example is automatic change due to reaching an age limit.

4 Salary types – Benefit type Liabilities

4.1 Benefit type assignment

For each salary type, you can define under the 'Benefit allocation' tab whether this salary type is included in the defined benefit types.

The value of this wage type flows accordingly into the base salary type stored in the benefit type.

5   Benefit Providers

5.1   General

Definition of service providers/insurers that can be stored as a reference for individual insurance contracts. Any number of contracts can be assigned to each insurer/service provider. For example, a customer has entered into various policy contracts with an insurer. For service providers transmitted via ELM, the number corresponds to the insurer number under the Swissdec recipient list. Service provider/insurer address details are stored and referenced in the SwissSalary contacts table.

The "Number of contracts" column shows the linked benefit contracts, which can be accessed directly. Each insurer can now have any number of contracts with different domain types.

Fieldname	Description
No.	Insurance number used according to the Swissdec recipient list, provided that a transmission like ELM is done. This number can be found on the insurance profile or can be requested on the Swissdec homepage under "Ready-to-receive payroll data receivers".
Description	Insurer label
Contact No.	Selection of the associated SwissSalary contact for linking the address and contact information to service provider/insurer
Number of contracts	Any number of contracts can be defined for each service provider/insurer. Click here to go directly to the view of the contracts linked to the selected service provider/insurer.

6 Declaration Setup

6.1 Setup

If the benefit is to be transmitted via ELM, a wage declaration must be set up. It is defined here which ELM domain applies to this benefit.

- The insurance code can only be stored in the records with the domains below
  1.) KTG – Daily sickness benefits insurance
  2.) UVGZ – Additional accident insurance

Fieldname	Description
Benefit Code	Benefit selection
Domain	Selection of the domain with which this benefit is reported electronically via ELM
Insurance Category Code	Insurance code selection. The insurance code can only be set if the KTG and UVGZ domains are assigned. – KTG – Daily sickness benefits insurance – UVGZ – Additional accident insurance

7 Benefit contracts

7.1 Insurance contracts

Service agreements/insurance contracts can be defined under Benefit contracts. Insurance contracts for which it should be possible to make electronic transmission to service provider/insurer can be stored with the necessary parameters.

Electronic transmission via Swissdec ELM Standard is intended for the domains below:
AHV/ALV, FAK, KTG, UVG, UVGZ.

Benefit contracts are assigned according to a benefit type. In addition, the domain for which ELM transmission is made is defined at the Benefit level. (Salary declaration configuration)

Fieldname	Description
No.	Contract number
Description	Insurance contract description
Provider No.	Service provider / Insurer selection. All entries recorded under Benefit service provider/Insurer can be selected.
Posting Group	This field is only required in the BVG. For example, a company has an insurance contract, though with several branches. Now the insurance company wants exact information about the branch, which can be transferred via company code.
Response Target	Allocated Salary or journal are specified based on the transmission from the BVG via ELM.
Customer No.	Input field for customer number, number according to the ELM insurance profile
Automatic Approval	Active / inactive If data is complete, the release process for wage reports is optional with the Swissdec 5.0 transmission standard. To be able to add people not settled via SwissSalary to the UVG annual wage report, the wage report can now be marked as incomplete on the contract. This way the release process is accessible in the insurance portal and people can be added there. Automatic ELM release is not activated in the Insurance contract table by default. If automatic ELM release is not activated, reports will be transmitted as incomplete to trigger the release process by the insurance company.
Salary Declaration Method	Electronic This method involves direct transmission of payroll data using web service technologies (WSDL, UDDI) and is a long-term goal.

7.2 Linked insurance contracts

For AHV contracts, BVG and UVG insurance contracts must be linked to be included in the ELM transmission. Benefits with the BVG or UVG domain in wage declaration settings can be selected. The associated contract is referenced and displayed accordingly.

8 Rules

8.1 Definition

User-defined rules can be created in order to have a benefit calculated only for certain groups of employees or the rates/fixed values based on various criteria.

To define the rule, the desired query can be put together using various WHERE, AND, OR operators. All tables and fields can be selected. One table can be selected for each rule and the query can be defined based on the available fields. Date formulas can also be used to define time-dependent rules.
The formulas that can also be set as filter criteria in the default Business Central views are available. The placeholders below are also available:

– Date of resignation: RD or resignationdate
– Settlement date: PD or paydate

A possible formula would be, for example:

>pd-cm-70Y

Different queries can be combined and grouped accordingly within a rule.
Different rules can also be used together in one rule. For example, age limit rule in combination with gender rule.

Note: at the moment, these functions are only available for table 3009080 Personnel.

8.2 Placeholders

As a rule, the placeholders below can be used:

– Date of resignation: RD or resignationdate
– Settlement date: PD or paydate