

Educator Deductions

This tip sheet will first walk you through:

1. Create a deduction category
2. Set up a new regular deduction (*page 2*)
3. Run a deduction (*page 4*)
4. One off Deductions (*page 5*)
5. End date and Inactivate a Deduction (*page 5*)
6. Helpful Hints (*page 6*)

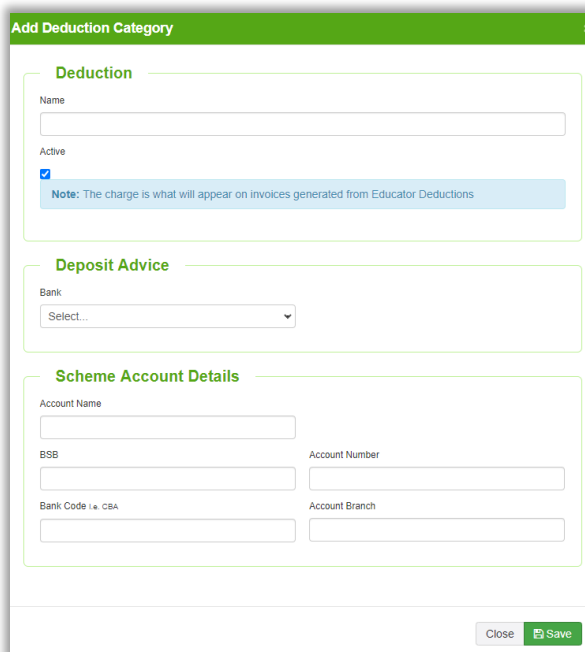
[1. Create a New Deduction Category](#)

Before you create a deduction to run each processing period you need to make sure you have the correct category. **NOTE: If you already have set up your category move to step 2**

To create a new deduction category:

Click on **settings cog** and select **Set up**

Select **Deduction category** Tab then click on click **Create New Deduction Category** button and the following window will open:



Enter the **Name** of the Deduction Category. The name of the category is what your educators will see on the payment advice.

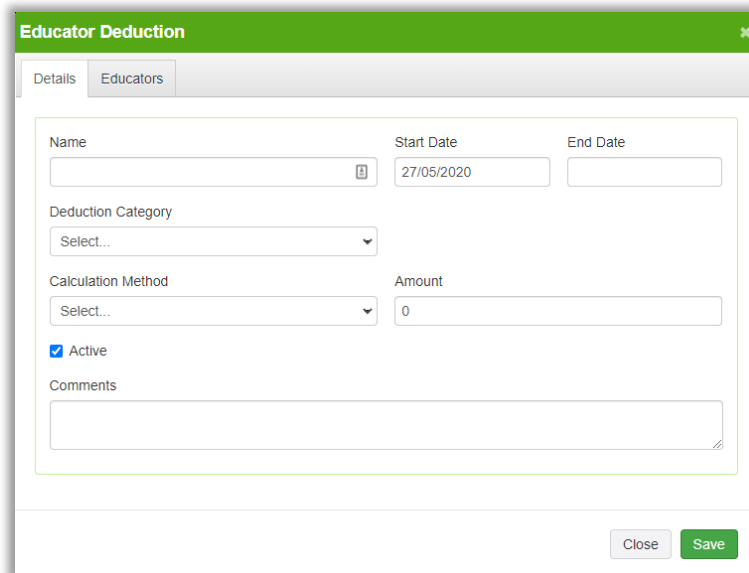
Deposit Advice and **Scheme Account Details** fill in this information if you are using ABA files or need to transfer the deduction monies collected to a different account. If your service doesn't use this process in Harmony, then leave the selections as is - blank.

Click **Save**.

2. Create a New Deduction

Click on the **Processing** Menu and select **Educator Deductions**

Click **+Setup New Educator Deduction** and the following menu will open:



On the **Details** tab enter:

Name: Only your service will see this name and it will be displayed on the Educator Deductions Screen

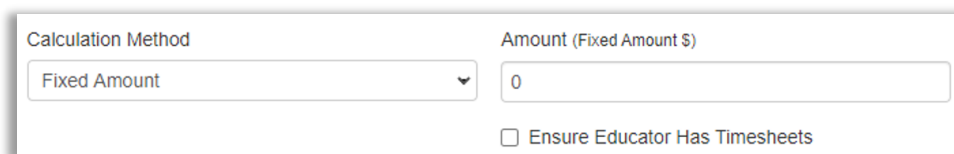
Start date: Enter a date when are you wanting these deductions to start calculating

Deduction Category: Select the category from the drop-down menu.

Calculation Method: Choose from either fixed amount, rate per hour, proportion of Care fee.

Amount: Enter the amount you are charging.

Fixed Amount



The dollar amount you enter here will charge the educator **per week**.

Tick **Ensure Educator has Timesheets** if you only want to charge this amount when you are submitting timesheets to educators. Untick if you want to charge the educators regardless of a timesheet being submitted.

Fixed Amount

Calculation Method	Amount (Multiply Total Fee By)
Proportion of Care Fee	0
	<input type="checkbox"/> Include Extras(Food, Travel, Ineligible Fee) In Calculation

Select this option if you are wanting to charge for a percentage of the care fees. E.g if you are charging 5% enter 0.005 in the amount section.

If you are wanting to include extras in the care fees, then tick this option.

Rate Per Hour

Calculation Method	Amount (Multiply Hours By)
Rate Per Hour	0

Will calculated the dollar amount per hour the child has been charged for.

Comment – This field is optional. This shows on the payment advise

Next, click on the **Educators** tab

Educator Deduction ✕

Details

Educators

Select Educators Select All

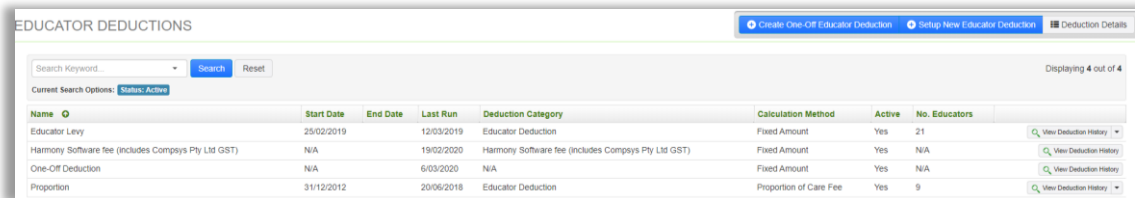
Close
Save

Here you can add or remove educators who you want this deduction to apply for.

If you want the deduction to run for all active educator's tick **select all** button. Or select individual educators by clicking in the **Select Educators** box. You can remove educators by clicking on the **x** next to each educator's name: ✕ Marks, Maree

Then click **save**.

The deduction you have created will now be displaying as you enter the Educator Deductions screen:



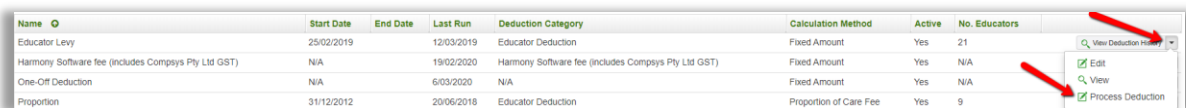
Name	Start Date	End Date	Last Run	Deduction Category	Calculation Method	Active	No. Educators
Educator Levy	25/02/2019	12/03/2019		Educator Deduction	Fixed Amount	Yes	21
Harmony Software fee (includes Compysys Pty Ltd GST)	N/A	19/02/2020		Harmony Software fee (includes Compysys Pty Ltd GST)	Fixed Amount	Yes	N/A
One-Off Deduction	N/A	6/03/2020		N/A	Fixed Amount	Yes	N/A
Proportion	31/12/2012	20/06/2018		Educator Deduction	Proportion of Care Fee	Yes	9

3. Run your Deduction

Once all session reports have been processed, you will then run your deduction.

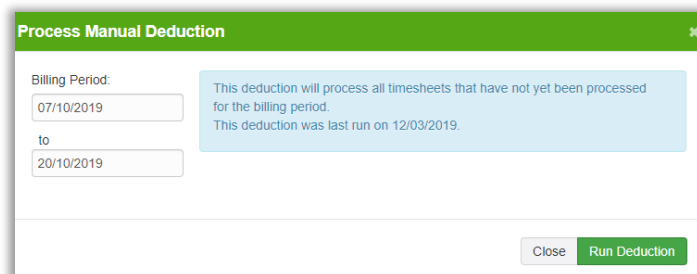
Click Processing and select Educator Deductions.

Locate your deduction. Click the arrow and select Process Deduction



Name	Start Date	End Date	Last Run	Deduction Category	Calculation Method	Active	No. Educators
Educator Levy	25/02/2019	12/03/2019		Educator Deduction	Fixed Amount	Yes	21
Harmony Software fee (includes Compysys Pty Ltd GST)	N/A	19/02/2020		Harmony Software fee (includes Compysys Pty Ltd GST)	Fixed Amount	Yes	N/A
One-Off Deduction	N/A	6/03/2020		N/A	Fixed Amount	Yes	N/A
Proportion	31/12/2012	20/06/2018		Educator Deduction	Proportion of Care Fee	Yes	9

The following window will open where you will then select **run deduction**:



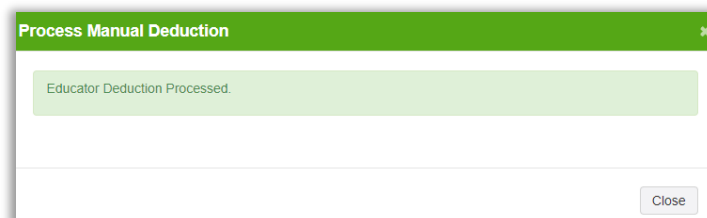
Process Manual Deduction

Billing Period:

 to

This deduction will process all timesheets that have not yet been processed for the billing period.
 This deduction was last run on 12/03/2019.

You will then get a successful message so now click **Close**:



Process Manual Deduction

Educator Deduction Processed.

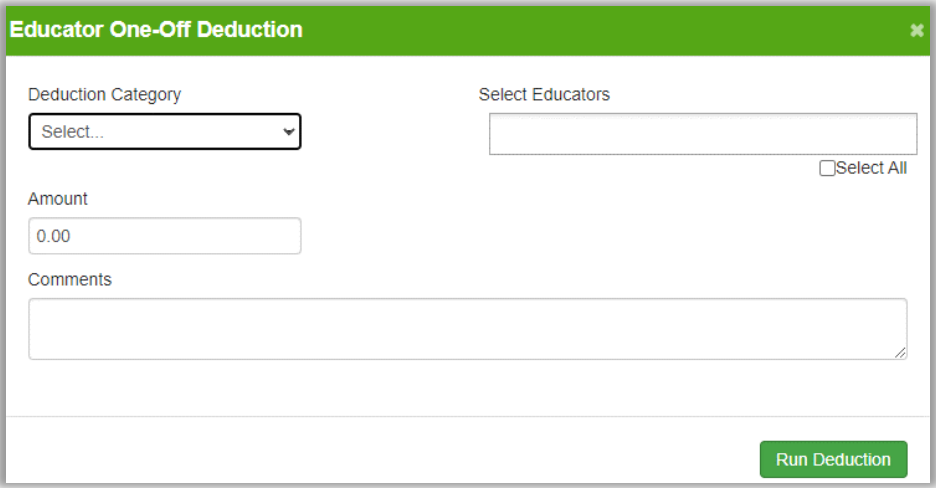
Your deductions have successfully been processed

NOTE: We also walk through this process on the tip sheet called *Day 2 Processing*.

4. One-Off Educator Deductions

You can also create one off deductions for educators. The amount you enter can be a positive deduction (to credit the educator) or a negative deduction (to debit the educator)

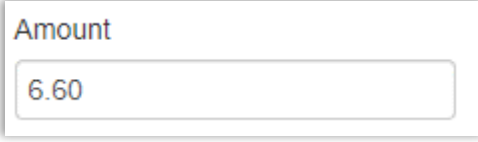
While in **Processing – Educator Deductions** click on **+Create One-Off Educator Deduction** and the following screen will open:



Select **educator/educators**, next select **category** and an amount:

Negative Deduction:

To debit the educator money just enter in the dollar amount:



Positive Deduction:

To create a credit for the educator in the amount add a minus symbol in front.



5. End Date and Inactivate Deduction

In some cases, you will need to end date your deduction and you can also make it inactive.

To do this first locate your deduction. Next click on the **down arrow** and select **edit**:

Name	Start Date	End Date	Last Run	Deduction Category	Calculation Method	Active	No. Educators	
Educator Levy	25/02/2019	27/05/2020		Educator Deduction	Fixed Amount	Yes	21	View Deduction History
Harmony Software fee (includes Compys Pty Ltd GST)	N/A	19/02/2020		Harmony Software fee (includes Compys Pty Ltd GST)	Fixed Amount	Yes	N/A	Edit
One-Off Deduction	N/A	6/03/2020	N/A		Fixed Amount	Yes	N/A	View
Proportion	31/12/2012	20/06/2018		Educator Deduction	Proportion of Care Fee	Yes	9	Process Deduction

The following window will open where you can enter an end date, and untick the active box:

Educator Deduction ✕

Details

Educators

Name

Start Date

End Date

Deduction Category

Calculation Method

Amount (Fixed Amount \$)

Active

Ensure Educator Has Timesheets

Comments

NOTE: Only an end date in an advance can be entered here

You can locate your inactive deductions via your search options:

Other Options

Show All

6. Helpful Hints

New Educators

If you have new educators join your service they will not automatically be added to your deductions. You will need to add the educator to your deduction manually by first locating your deduction, click on the down arrow and select edit:

Name	Start Date	End Date	Last Run	Deduction Category	Calculation Method	Active	No. Educators	
Educator Levy	25/02/2019		27/05/2020	Educator Deduction	Fixed Amount	Yes	21	View Deduction History
Harmony Software fee (includes Compys Pty Ltd GST)	N/A		19/02/2020	Harmony Software fee (includes Compys Pty Ltd GST)	Fixed Amount	Yes	N/A	Edit
One-Off Deduction	N/A		6/03/2020	N/A	Fixed Amount	Yes	N/A	View
Proportion	31/12/2012		20/06/2018	Educator Deduction	Proportion of Care Fee	Yes	9	Process Deduction

Click on the **educators** tab and either click on select all or click within the select educators box and select the new educators individually via the list in the drop down menu:

Educator Deduction

Details

Educators

Select Educators
 Select All

✕ Beacher, Kya

✕ Daane, Kylie

✕ Duncan, Clare

✕ Elle, Kay

✕ Harrison, Melissa

✕ Jones, Alex

✕ Jones, Haper

✕ M, Kristie

✕ Marks, Minnie

✕ McDonald, Joseph

✕ McDonald, Lucy

✕ OAKFORD, Delliah

✕ Wood, Noah

✕ Zachrey, Zara

Bandas, Harper

Issa, Mel

Jones, Jenny

Lee, Christy

Wrong Start Date

If you accidentally enter the wrong start date on your deduction this cannot be changed. You will need to make the deduction inactive and create a new one.

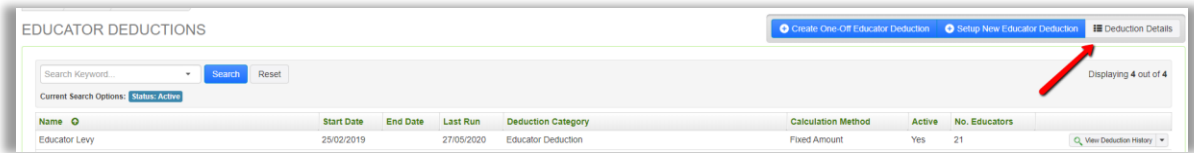
Changing Fee's

If you are increasing or decreasing the amount charged you **should not** edit and change the fees. Instead we recommend that your service follows the below procedure:

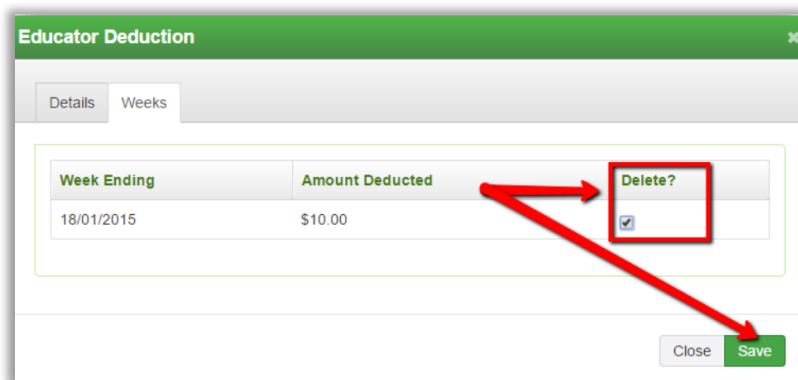
1. End date the current educator deduction
2. Makes inactive the current deduction (*optional*)
3. Create a new deduction with the new amount

Incorrect amount charged

If you have entered a deduction charge incorrectly you can delete it. View the deduction details, find the deduction and click **Edit**.



Open the **Weeks** tab. Click the week, tick **Delete** and select **Save**



NOTE: This option is only available for deductions run in your current billing cycle.