



## Cheat Sheet for reporting in Egenrapportering

### If questions?

Phone:

Malin Jonsson	063-165436
Violeth Lindström	063-165321
Jenny Smedman	060-148553
Helene Karlsson	063-165322
Katarina Bouvin	060-148871

## Contents

Egenrapportering, ER .....	1
Glossary .....	2
Reporting Status in ER.....	2
Open Egenrapportering, ER.....	3
Person.....	5
Basic informations .....	5
Employee file.....	5
Relatives .....	5
Children.....	6
Leaves .....	6
Report .....	6
To change a report.....	7
Vacation .....	8
Caring for sick children.....	8
Caring for sick children, day 1-10 and from day 11 .....	9
Temporary parental benefit in connection with the birth of a child or adoption .....	9
Paid leave .....	9
Family matters.....	9
Change of residence.....	9
Union representative.....	9
Sick leave.....	9
Balance .....	10
Vacation .....	10
Income statement.....	11
Salary Specification.....	12

## Egenrapportering, ER

Egenrapportering allows you to look at your own pay slip, earnings report and tax deductions and different balances, such as remaining vacation days.

You can change your name, address and also report:

- Vacation
- Caring for sick children
- Paid leave
- Shorter sick leave (up to 7 days)
- Traveling

These reports are forwarded to your manager for attest and then to pay roll. You can continually monitor your case and see, for example if your vacation request is approved.

A wage-case may be dismissed by the approver. Then an e-mail is sent to the reporter with a comment on what information should be added or the reason to why the report is "stopped".

It is the reporter's responsibility to correct and re-send the wage-case for attest.

## Glossary

**Villkorsavtal** – agreements for employees of agencies under the Government

**Attest** – There are two different functions/permissions for attest. En egenrapportering / a “self-report” that you’ve made to the system is normally certified by reviewers and approvers

**“Beviljare”** – Appointed person granting the travel bills, for example a project manager. Some inst/dept uses appointed issuers.

**Approval** – The approval is done by the manager in charge, who considers whether the leave or addition is in accordance with collective agreements and other regulations

**“Granskare”** – Appointed person who reviews travel expenses, i.e. checks that the travel contracts are followed.

**Concentrated in part time** – Employees working less than full time and concentrate their part-time, i.e. working less than five days per week. This can for example be an employee with maternity leave or partial retirement.

**Partial leave** – Employees working full time and is on leave, but the leave is concentrated to full days.

**Meal benefits** – Is put on as a benefit if the university has paid for the meals.

**Meal deduction** – Deduction of allowance for meals you have been offered associated with business or included in hotel price.

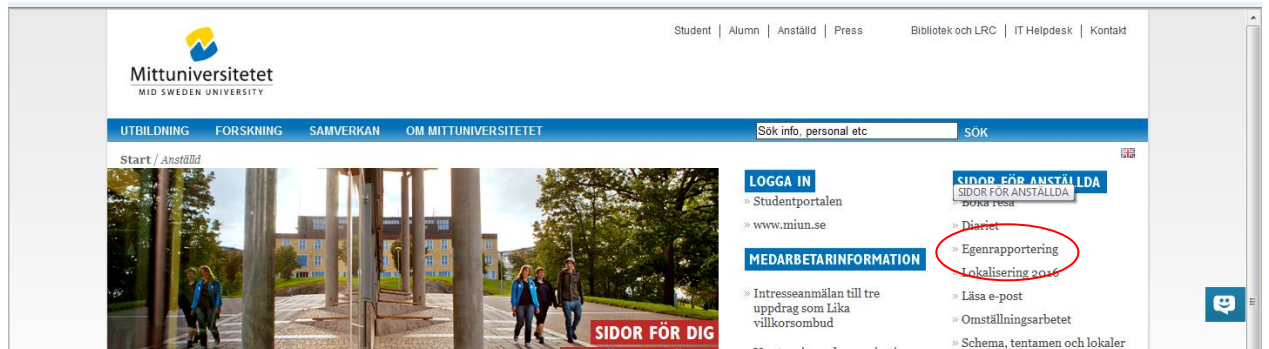
**“Sök person”** – A special access which means that a responsible administrator can open Egenrapportering for another person.

## Reporting Status in ER


<b>Reported</b>	The report has been created and saved in Egenrapportering
<b>Granted</b>	The report is granted by HR-administrator
<b>Examined</b>	The report is reviewed by an appointed reviewer and ready for approval
<b>Approved</b>	The report is approved by the manager in charge
<b>Transferred</b>	The report is transferred to payroll system to calculate salary
<b>Not approved</b>	The report has been rejected by the approver
<b>For investigation</b>	The report is under investigation by the approver
<b>Saved preliminary</b>	The report is saved but not sent to authorization

## Open Egenrapportering, ER

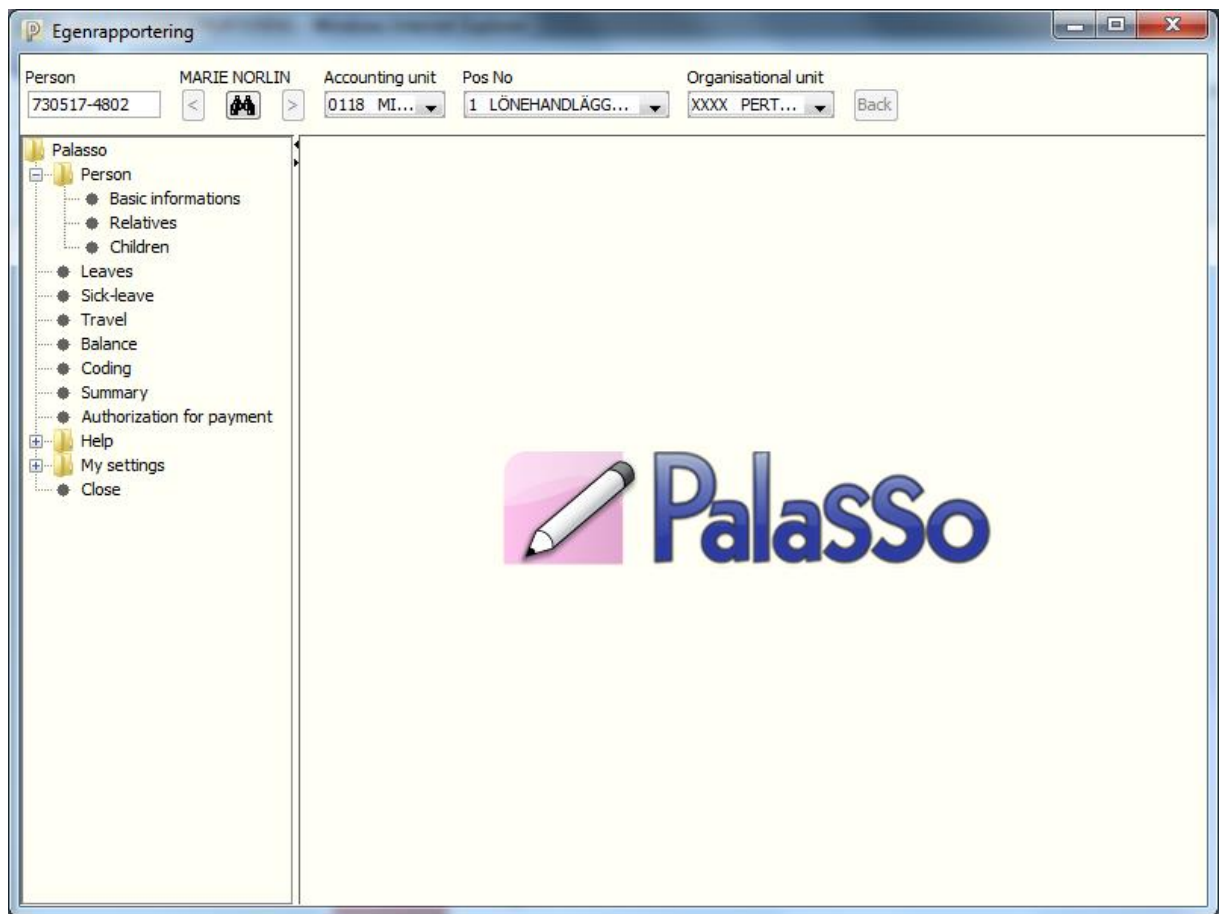
Open **Palasso Egenrapportering**, [www.miun.se/egenrapportering](http://www.miun.se/egenrapportering). You will receive a security alerts; answer **Yes/Allow/Run**.



At the top of the window you see name, **Person** (date of birth + 4 figures), **Pos No** (job title) and **Organisational unit**.

Person	MARIE NORLIN	Accounting unit	Pos No	Organisational unit	
730517-4802	<  >	0118 MI...	1 LÖNEHANDLÄGG...	XXXX PERT...	Back

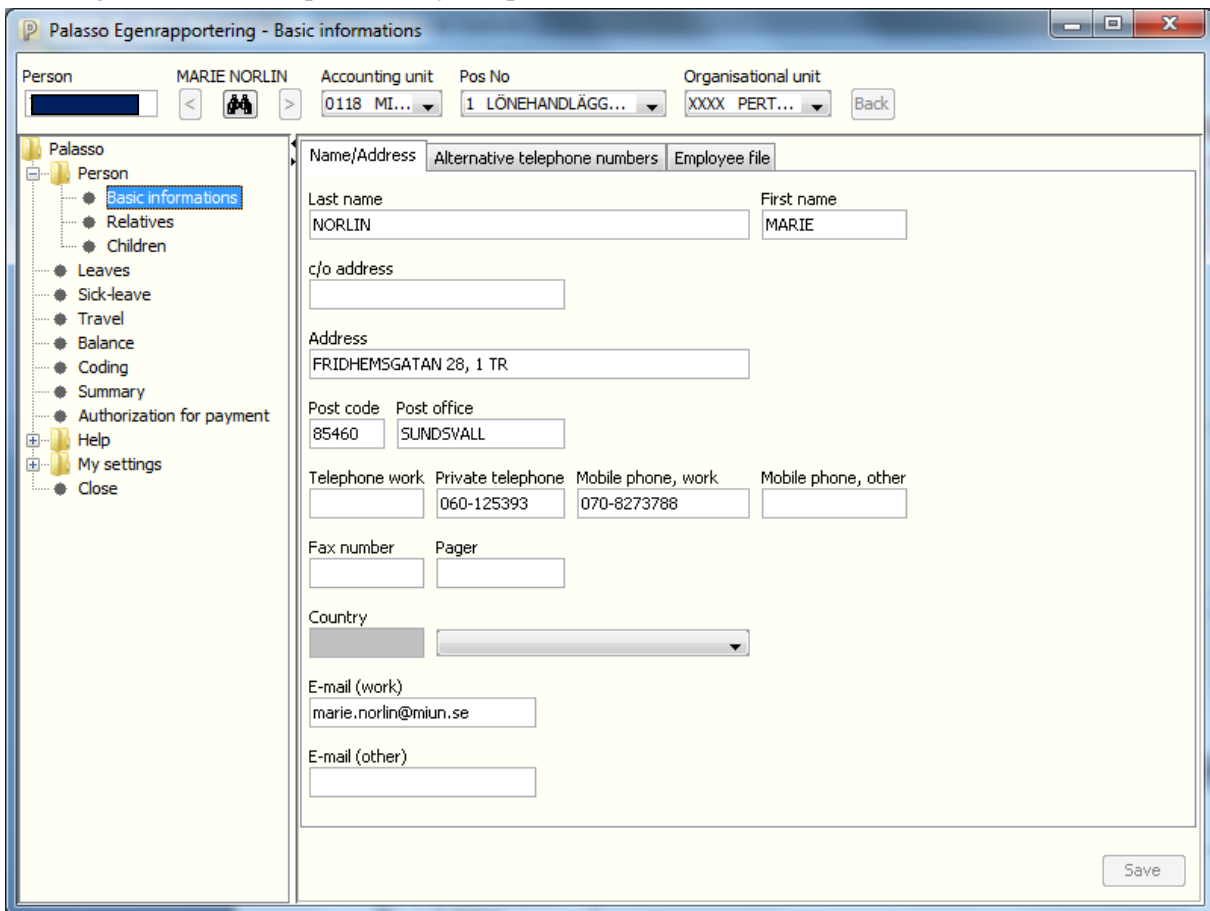
When you open Egenrapportering you will come to your own personal window. To the left is a menu showing the different functions involved. These functions are described in more detail later. Your access-rights controls which functions you can handle in Egenrapportering.



When you finish working in ER click **Close** or the **X** on the top right

## Person

**Person** displays personal data in the four tabs; **Name/Address**, **Alternative telephone numbers** and **Employee file**. Here you can modify and add name, telephone number and address, workers' organization and family information etc. You can also print the Employee file which gives an overall picture of your personal information.



Palasso Egenrapportering - Basic informations

Person: MARIE NORLIN | Accounting unit: 0118 MI... | Pos No: 1 LÖNEHANDLÄGG... | Organisational unit: XXXX PERT... | Back

Navigation: Palasso > Person > Basic informations

Form Fields:

- Name/Address: Last name: NORLIN, First name: MARIE
- c/o address: [Empty]
- Address: FRIDHEMIGATAN 28, 1 TR
- Post code: 85460, Post office: SUNDSVALL
- Telephone work: [Empty], Private telephone: 060-125393, Mobile phone, work: 070-8273788, Mobile phone, other: [Empty]
- Fax number: [Empty], Pager: [Empty]
- Country: [Dropdown]
- E-mail (work): marie.norlin@miun.se
- E-mail (other): [Empty]

Save

### Basic informations

The first time you enter Palasso, choose **Person – Basic informations**.

Check your **E-mail (work)**. The E-mail address is used to send reminder e-mails. You can also enter the phone number for home and mobile phone.

### Employee file

Here you can see what the PA-system has registered about you and your employment. For example salary history, your education, history for leave etc.

### Relatives

Here you enter information on your family.

## Children

Information about children

State	Name of child	The child's date of birth
	ELIAS HOLMSTRÖM	2002-06-17
	OLLE HOLMSTRÖM	2004-05-16

If you will require **Caring for sick children** you must indicate here your children and their date of birth.

## Leaves

Under **Leaves** in the menu, you can apply for:

**Vacation** (relating mainly TA-staff)

Annual vacation days

**Caring for sick child/Parental benefit**

Caring for sick child 1-10 days

Caring for sick child more than 10 days

Parental benefit in connection with the birth of a child or adoption

**Paid leave**

Family matters

Union representative

Change of residence (1 day)

When applying for additional leave, use form.

## Report

Type of salary: 6202

Group of leaves: Vacation

Type of leaves: Vacation

Move issue to: PERTEST

From:  At (hour):  Until:

At (hour):  Extent:  Quotient:

Number of days:  Children:

Coding:

Note (max 72 letters):


The last month
  The last 3 months
  The last 12 months
  All

Show occurrences from salary

Reason for the leave	From	At (hour)	Until	At (hour)	Extent	Number	Quotient	Corr	Coding	Status
Family matters	110901		110901			1.00				Reported
Vacation	110824		110831							Transferred
Vacation	110801		110805							Transferred
Vacation	110715		110715							Transferred
Vacation	110704		110708							Transferred

1. Select **Leaves** to the left in the menu.
2. Select **Group of leaves** and **Type of leaves**.



3. Fill out other information on the screen.
  - Date of leave (ÅÅMMDD) **From** and **Until**. Click on the icon  to see the calendar and selecting the correct date.
  - Define **extent** as a percentage, if you are **not** free all day. For example if you are working full-time (8 hours/day) and are on leave 2 hours, report 25 percent leave. **This does not apply to vacation; holidays are always a full day.**
  - **Number of days** are in some cases mandatory. (For example Care of children and Family affair). Always indicate number of working days, not calendar days.
  - **Children:** If you register **Caring for sick children** you press the arrow to find your child. You must already have registered your children under the tab **Children**.
4. In the memo field **Note** you can add comments to the leave and in some cases this is mandatory.
5. Click **Save** when finished and the report is sent for approval. When the report is approved, the status bar on the screen will show **Approved** instead of **Reported**. Status **Transferred** means that the report has been transferred to payroll system.

**Employees who have 2 jobs, such as 50 % in SHV and 50 % Camp, should report leave from both jobs.**

## To change a report

You can change or remove a period of leave-report which has the status **Reported**:

- Click on the row in the report that you want to change or delete.
- Change the data or click **Delete**. Then click **Save**.
- If you want to edit or delete a task that is **Approved**, contact the approver who certifies your cases. It is only the approver who can make corrections when the report has the status of approved.

Type of salary: 6202 | Group of leaves: Vacation | Type of leaves: Vacation | Move issue to: PER

From: 2011-08-24 | At (hour): | Until: 2011-08-31 | At (hour): | Extent: | Quotient: | Coding: | Note (max 72 letters):

The last month  The last 3 months  The last 12 months  All

Reason for the leave	From	At (hour)	Until	At (hour)	Extent	Number	Quotient	Corr	Coding	Status
Family matters	110901		110901			1.00				Reported
Vacation	110824		110831							Transferred
Vacation	110801		110805							Transferred
Vacation	110715		110715							Transferred
Vacation	110704		110708							Transferred

Leaves dialog box: Do you want to correct? [Yes] [No]

When you need to delete a task in status of **Transferred**, you must correct it.

Click on the task you want to delete and the in the box; **Correct**. Answer **Yes** on the question; **“Do you want to correct?”**

## Vacation

Teachers' time for vacation is sent out automatically according to local agreement.

In the case of vacation for staff who does not work 5 days a week, part-time employees or at part-time sick leave, *a schedule must have been submitted to payroll managers*. This is necessary to make an accurate vacation-calculation for staff with annual working time which deviates from 260 days.

## Caring for sick children

Specify how much, in percent, of the workday you were absent. You can report 100, 75, 50, 25%

If you are absent for a whole day and have a partial leave of absence, specify the extent remaining after deduction for the leave. This applies whether your service is abbreviated 5 days a week or if the leave is concentrated to full days.

**Example 1:** You have a partial leave of absence on 20 % and has been absent for a whole day. Enter 80 in the box **Extent %**.

**Example 2:** You have a partial leave of absence on 20% and are working Monday – Friday. You are at home to care for a sick child for half a day. Enter 40 in **Extent** ( $100-20=80$ ,  $80/2=40$ ).

## Caring for sick children, day 1-10 and from day 11

If your annual income is less than 7,5 x base amount (2011:  $7,5 \times 42\,800 = 321\,000$  SEK) always select **Caring for sick child, dag 1-10** in **Type of leave**.

If your annual income exceeds 7,5 x base amount (2011:  $7,5 \times 42\,800 = 321\,000$  SEK) select, **Caring for sick children, dag 1-10** the first 10 days and from day 11 use **Caring for sick children, day 11**.

If the 10 days-breakpoint should occur during the same leave, you must report in two stages:

Example: Earlier in the year you have been on leave in 8 days to take care of sick children.

Now you need to report a new leave to care for sick children for the period from 131015 – 131017 (3 days)

*Step 1 Type of leave = Caring for sick children, day 1-10* 131015 – 131016

*Step 2 Type of leave = Caring for sick children, day 11-* 131017 – 131017

## Temporary parental benefit in connection with the birth of a child or adoption

Number of working days and the baby's birth date is mandatory. The father or the other parent is entitled to 10 days of temporary parental benefit.

## Paid leave

### Family matters

The leave applies in connection with serious illness, death in the family and closest family circle. Employees have the right to leave a maximum of 10 working days per year. To indicate kinship, use anteckningar (notes).

### Change of residence

Employees are entitled to paid leave for one day per year. **Remember to change the address!**

### Union representative

Employees are entitled to paid leave up to 10 days per year. To indicate purpose, use anteckningar (notes).

## Sick leave

When you fall ill, you must notify the switchboard. Call even if you fall ill during the day and are leaving work. Switchboard-operators then notify payroll managers who make the report to ER that you are ill.

When you return to work you have received an e-mail telling you to finish your sick leave. Now you report the last day (date) of illness in the field **Until** in ER. After seven days you will receive a reminder on a doctor's certificate.

Long-term illness is not reported through ER. When you are sick for more than 7 days, the sick leave is reported directly to Palasso Lön by the payroll managers and you don't need to report further in ER. If you are sick for at least seven days, then you send a copy of your medical certificate to the payroll manager.

Type of salary 5399	Sick-leave group Sick leave	Type of sick-leave Sick pay period	Move issue to PER	Clear					
From	At (hour)	Until	At (hour)	Extent					
Number of days	Working hours per week	Children	A doctor's certificate From						
			Until	<input type="checkbox"/> Reported to the national insurance off <input type="checkbox"/> Inquiry into rehabilitate started					
Note (max 72 letters)									
<input type="radio"/> The last month <input checked="" type="radio"/> The last 3 months <input type="radio"/> The last 12 months <input type="radio"/> All									
<input type="checkbox"/> Show occurrences from salary									
Sick-leave	From	At (hour)	Until	At (hour)	Extent	Number	Corr	Status	Delete row
Sick pay period	110902		110902		50.00			Reported	Correct
									Print row...
									Print all...

### Select **Sick leave**

Click on the reported sick leave in the list on screen (registered by payroll administrator).

The row is "lifted up" and you can enter your last day of illness as ÅÅMMDD. In case you were not ill the whole first day, you need to enter two reports; one for karensdagen (= the qualifying day for sickness) and one for the following period. The first row then have data in the Field; **From**, **Until** and **Extent** in %.

The extent can be one of the following; 25 %, 50 %, 75 %, 100%. Round up. **Save**.

Enter the date for the subsequent period and click on **Save** again.

## Balance

### Vacation

Select **Balance** in the menu. Under the tab called **Akkumulators** you can see "vacation-balances".

**Note that only the "wage-cases" which have been a part of the latest wage payment are included in the balances.**

Here you can also see other accumulators as for example; paternity leave and preventive health care. Select current **Accgroup** and **Accumulator** and click on the button **Get**.

Accumulators | Income statement | Salary specification

Accgroup  
 Vacation

Accumulator

Accumulators from the last calculation

Denomination	Unit	Balance	Previous year
Vacation, consumed	Days	0.00	28.00
Vacation, remaining	Days	0.00	3.00
Vacation, saved	Days	25.00	

### Income statement

Here you can see earnings report and tax deduction previous year. You can also print them

Accumulators | Income statement | Salary specification

Year  
 2010

Code	Task	Value
01	Avdragen skatt	90444
11	Kontant Bruttolön m.m.	323632
12	Förmån ej bil, drivm	228
42	Kost	X
51	Trakt inom riket	X
55	Resekostnaders	X
570	Specifikationsnummer	0118
60	Arbetsställenr. från SCB	00021

## Salary Specification

Open the tab **Salary specification**

Accumulators   Income statement   <b>Salary specification</b>					
Month		Year		Payment day	
December		2010		2010-12-23	
<input type="button" value="Get spec"/>					
Denomination	%	From-Until	Number	Price pe...	Amount
LÖN					25550,00
SEMESTERTLG,DAG			1,00	112,40	112,40
SEMESTERUTTAG		101223-1223	1,00		
PREL A-SKATT FR HÖJN		101201-1231			-300,00
DAGTRAKTAMENTE HEL		101026-1027	1,00	210,00	210,00
DAGTRAKTAMENTE HEL		101102-1103	2,00	210,00	420,00
DAGTRAKTAMENTE HALV		101026-1027	1,00	105,00	105,00
FRUKOSTAVDRAG		101102-1103	1,00	42,00	-42,00
LUNCHAVDRAG		101102-1103	2,00	74,00	-148,00
MIDDAGSAVDRAG		101102-1103	1,00	74,00	-74,00
FRUKOSTAVDRAG HALV		101026-1027	1,00	21,00	-21,00
FÖRR. TILLÄGG DAG HEL		101026-1027	1,00	150,00	150,00
FÖRR. TILLÄGG DAG HEL		101102-1103	2,00	150,00	300,00
FÖRR. TILL. HALV DAG		101026-1027	1,00	75,00	75,00
FÖRR.TLG ENDAGS		101206-1206	1,00	150,00	150,00
LUNCH FÖRMÄRDE		101102-1103	2,00	76,00	152,00
MIDDAG FÖRMÄRDE		101102-1103	1,00	76,00	76,00
PRELSKATT					-6865,00

To be paid 19622,40

1. Select year and month.
2. Click on **Get spec**.
3. If you want to print the specification, click on **Print...** Current month's salary appears around the 20<sup>th</sup> of the month.
4. At the bottom of the window you will see the current net pay