DIANO

DIANO ACADEMY · MODULE COURSE M15

HR and payroll

Employees, leave, the monthly payroll run, payslips and the EMP201 figures

For: Company Admin and HR Payroll · **Length:** 40 minutes · **Track:** M: Per module · **Version:** 5 November 2026

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HR and payroll

WHO IT IS FOR
Company Admin and HR Payroll

LENGTH
40 minutes

BEFORE THIS COURSE
Your company on the Growth plan (or the trial).

YOU WILL BE ABLE TO
Set up HR settings and an employee, apply for and approve leave, do a payroll run from create to finalise, download payslips, and record the EMP201 submission.

HR and payroll are on the **Growth** plan. This course follows **Payroll for a small business: the basics** (diano.co.za/help/app/payroll-basics.html), **Run payroll for a month** (diano.co.za/help/app/payroll-run.html), **Get an employee's payslip** (diano.co.za/help/app/payslips.html), **Apply for and approve leave** (diano.co.za/help/app/leave.html) and **EMP201 (PAYE, UIF and SDL)** (diano.co.za/help/app/emp201.html).

Who does what

- A **Company Admin or HR Payroll** user manages employees, leave and payroll.
- An **Auditor** can view.
- The payroll run is approved by **someone other than the person who prepared it**.
- **EMP201:** a Company Admin or HR Payroll user marks it submitted. A Finance User, Accountant or Auditor can view it. Only a Company Admin can undo a submission.

Set up (once)

1. Open **HR**, then **HR settings**. Check the **Departments**, **Positions** and **Cost centres** lists, and add your own with **Add**.
2. On the **Payroll and leave** tab, choose your SDL setting, the **Pay day** and how annual leave accrues. Press **Save settings**.
3. Open **HR**, then **Employees**, and press **+ New employee**.
4. Fill in the personal details (First names, Surname, SA ID number or Passport number), then the employment details (Start date, Department, Position, Cost centre).
5. Fill in **Tax and statutory**, **Banking** and **Basic salary (monthly)**. Add regular items under **+ Add earning or deduction**. Press **Save employee**.

> The **Tax tables** tab shows the SARS tables DIANO uses, with their sources. In **Settings › Tax and compliance**, set **Registered as an employer (payroll taxes)**.

Leave

1. Open **HR**, then **Leave**, and press **+ Apply for leave**.
2. Choose the **Employee** and the **Leave type**, then the **First day** and the **Last day**. Tick **Half day** for a single half day. DIANO shows how many working days it counts.
3. Press **Submit leave request**. It is **Pending**.
4. On the **Requests** tab, press **Approve** or **Decline**, then **Approve leave** or **Decline leave**. Declining needs a reason.

> Weekends and public holidays are not counted. Tick **Medical certificate received** when you have it; DIANO marks **Certificate needed** when the law asks for one. The **Balances** tab shows entitlement, taken and balance.

The monthly payroll run

1. Open **HR**, then **Payroll**. Under **New payroll run**, choose the **Month**, check the **Pay date** and press **Create the run**.
2. Under **Employees and this month's inputs**, tick who is paid. Type overtime hours, commission and bonus where needed. Press **Calculate**.
3. Check the totals, the changes from last month and a few payslips. **Change inputs** goes back.
4. Someone other than the preparer presses **Approve run**. If you are the only one, type the reason and approve.
5. Press **Finalise run**. The run is locked: payslips are issued, and the bank payment file and EMP201 are ready. With Accounting on, the salaries journal is posted.
6. Press **Bank payment file (CSV)** to load the salaries at your bank. When the money has left, fill in **Paid on** and **Reference** and press **Record salaries paid**.

> A finalised run is never changed: **Reverse this run** with a reason, then **Create the corrected run**. Overtime 1.5× is for weekdays and Saturdays; 2× for Sundays and public holidays.

Payslips and the EMP201

- **Payslips** live on their payroll run: open the run, press **Payslip** next to the employee, then **Download PDF**. Give or send it to the employee yourself: DIANO does not e-mail payslips yet. Each payslip shows how PAYE was worked out.
- **EMP201:** open **HR**, then **Payroll**, and press **EMP201 by month**. Check PAYE, UIF, SDL and the amount payable. Press **Values to type into eFiling**, or download the PDF or CSV.
- **Submit and pay on SARS eFiling yourself.** Then fill in **Submitted on**, the SARS reference and the **Proof**, and press **Record as submitted on eFiling**. The month is locked.

> The EMP201 says **"Preview — check with your tax practitioner"**. Check it with your tax

practitioner before you rely on it. DIANO does not file anything with SARS.

Common mistakes

- **Approving your own run** when someone else could. Ask a colleague.
- **Changing a finalised run.** Reverse it and create the corrected run.
- **Waiting for DIANO to e-mail payslips.** Download and send them yourself.
- **Relying on the EMP201 without your tax practitioner's check.**
- **Approving leave after the run.** Unpaid leave then isn't in that month.

Exercise (practice company)

1. As **Nomsa Ndlovu (HR Payroll)**, open **HR settings** and make sure the departments Admin, Finance, Sales and Site Operations exist (press **Add** for any that are missing).
2. Apply for 2 days' annual leave for **Johan Botha (example)** and approve it as **Thandi Mokoena**.
3. As Nomsa, create the November run. Add 4 hours' weekday overtime for Johan Botha. Calculate.
4. Open Johan's payslip and read **How PAYE was worked out**.
5. As Thandi, approve the run. As Nomsa, finalise it and download two payslips.
6. Open **EMP201 by month** for November and read the figures. Don't record a submission.

Where to read more

- Help Centre: Payroll for a small business: the basics · Run payroll for a month · Get an employee's payslip · Apply for and approve leave · EMP201 (PAYE, UIF and SDL) · Moving staff and payroll
- Next course: Track G, HR Payroll