



Cloud Fleet Manager

# CFM CREWING

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## PAYROLL SETTINGS

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# 1. Settings

On the **Settings** tab, you set up and manage the relevant master data for CFM Crewing.

The tab is divided into the following subtabs:

- **Documents**

Define which documents are mandatory for certain ranks. The system then automatically generates and marks documents as required for the applicable ranks.

These documents then appear on the following tabs:

- **Dashboard**
- **Seafarers**
- **Crew List**
- **Planning**

- **Ranks**

Add ranks that are used within your company and apply the relevant settings.

- **Officer Matrix**

Define the requirements and prerequisites for the type of officers needed onboard your tanker vessels. This includes for example the years of experience in a certain rank.

- **Payrolls**

Define global and custom payroll settings as well as payroll earnings and payroll deductions.

- **Wage Scales**

Define different types of wage scales for every rank.

- **Payment Banks**

Define bank accounts relevant when you pay out the seafarers. These banks are used for the bank file creation in your payment process.

- **PHL Contributions**

Define social security contributions for Philippine seafarers.

- **Agencies**

Define the agencies from which you hire seafarers.

- **Travel Agencies**

Define the relevant travel agencies that you hire to plan your crew changes.

- **Miscellaneous**

Make various settings, such as document types, remark categories, and person history types.

- **Email Templates**

Define which fields and custom texts should be part of the different predefined email templates used throughout the crew planning process.

- **Vessels**

Define the minimum safe manning for each rank as well as the number of mandatory certificates for the selected vessels.

You can also filter for inactive vessels to clear the irrelevant data.

- **Users**

Assign one or more roles to specific users. You also define for which vessels the user is responsible and which seafarer profiles can be accessed based on the rights given to agencies.

- **Roles**

Define which roles get access to certain areas and functions within CFM Crewing. The roles are predefined, but must be configured before the app can be used.

## 1.1. Payrolls

On the **Payrolls** subtab, you can define how payroll data is calculated and displayed.

The screenshot shows the 'Payroll settings' page in the CFM Crewing application. The top navigation bar includes 'Documents', 'Ranks', 'Officer Matrix', 'Payrolls' (selected), 'Wagescales', 'Payment Banks', 'PHL Contributions', 'Agencies', 'Travel Agencies', 'Miscellaneous', 'Vessels', 'Users', and 'Roles'. The left sidebar contains 'Payroll settings', 'Global settings', 'Custom settings', and 'Paycodes'. The main content area is titled 'Global Settings' and contains the following configuration options:

- Permanent contracts mode:** A dropdown menu currently set to 'Leave pay after assignment'.
- Print bank details on payroll slip**
- Company bonus name:** A text input field containing 'Company Bonus'.

A 'SAVE' button is located at the bottom right of the settings area.

It is divided into the following three areas, which you find in the **Payroll Settings** list on the left:

- **Global Settings**

In this area, you define settings that have a global impact on how the data is displayed within the **Payroll** tab of CFM Crewing and how it is exported.

- **Custom Settings**

In this area, you define settings for the payroll calculation method, wages, and allotments. These settings also impact specific payroll processes, such as home allotments.

- **Pay Codes**

In this area, you define payroll earnings and payroll deductions.

The colored stripes on the left of each entry indicate the status of the earnings and deductions:

- **Green** - The earning or deduction is active.
- **Red** - The earning or deduction was deactivated.

### 1.1.1. Define Global Payroll Settings

1. Go to **Settings > Payrolls > Payroll Settings > Global Settings**.
2. On the **Global Settings** card, you can make the following settings:

- a. **Permanent Contracts Mode**

Select one of the following options from the drop-down list:

- i. **Disabled**

Select this option, if you don't want to automatically pay the seafarer an extra remuneration after their assignment.

- ii. **Leave Pay After Assignment**

By default, this option is selected and ensures that all seafarers with a permanent contract get a leave pay after their assignment.

- b. **Print Bank Details on Payroll Slip**

If you select this option, the bank details of the main bank are printed on the pay slip of the seafarers.

If no main bank account was defined, the first bank account in the list is used.

- c. **Company Bonus Name**

As every company has a different bonus system, you can use this field to define a name for your company's bonus. The bonus is then displayed within the seafarers' wage scales and assignments as well as in their individual payroll.

3. Choose **Save** to save your changes.

### 1.1.2. Define Custom Payroll Settings

Define how the payrolls of your seafarers should generally be calculated. Additionally, you can add settings that are specific for certain nationalities and/or manning agencies that you work with.

1. Go to **Settings > Payrolls > Payroll Settings > Custom Settings**.
2. To define new custom payroll settings, choose **Add**.
3. In the dialog window, enter the following data:
  - a. **Valid From /For**

In this section, you define the month as of which the custom payroll settings become effective as well as for which nationality or agency the settings are valid.

i. **Valid From**

Select a month from which the following payroll settings should be valid.

ii. **Valid for Nationality**

Define the payroll settings that should be applied to a certain nationality or to all seafarers.

A. **Default**

By default, this option is selected which means that the payroll settings apply to all seafarers no matter which nationality they have.

B. A specific nationality selected from the drop-down list.

The payroll settings are then only applied to seafarers belonging to the selected nationality.

iii. **Valid for Agency**

Define whether the payroll settings should be applied to seafarers belonging to a certain agency or to all seafarers.

The colored circles in front of the agency's names indicate the status of the agency. **Green** means that the agency is active. **Red** means that the agency is inactive.

A. **Default**

By default, this option is selected which means that the payroll settings apply to all seafarers no matter to which agency they belong.

- B. A specific agency selected from the drop-down list.  
The payroll settings are then only applied to seafarers belonging to the selected agency.

iv. **Rank Type**

Define whether the payroll settings should be applied to seafarers with a specific rank type.

A. **Both (Default)**

By default, this option is selected which means that the payroll settings apply to all seafarers independent of their rank type.

B. **Officer**

If you select this option, the payroll settings are applied to seafarers with the rank type **Officer** only.

C. **Rating**

If you select this option, the payroll settings are applied to all seafarers whose rank is **not** marked as **Is Officer**.

v. **Remark**

Enter any additional remarks into this field.

- b. Choose **Save** to continue defining the remaining custom payroll settings.

c. **Payroll Calculation Method**

Edit Custom Payroll Settings
⊗

<b>Valid from / for</b>	Voyage payroll generation scheme Voyage payroll - Individual	Calculation - Regular 30 days
<b>Payroll calculation method</b>	Forward balancing Enabled	Paid out Enabled
<b>Wage options</b>	Copy balance to paid out Disabled	
<b>Allotment options</b>		

CANCEL CONFIRM SAVE

In this section, you define how the payroll of the seafarers is calculated.

i. **Voyage Payroll Generation Scheme**

Select one of the following options from the drop-down list:

A. **Default (Voyage Payroll - Individual)**

By default, this option is selected. A payroll is generated for every assignment within one month. Each assignment is treated separately. This means that two assignments in one month could lead to a total calculation of 31 days.



B. **Contract Payroll**

If you select this option, a monthly payroll is generated that can include multiple vessel assignments and other non-assignment-related periods that the seafarer is paid for.

C. **Voyage Payroll - Individual**

If you select this option, a payroll is generated for every assignment within one month. Each assignment is treated separately. This means that two assignments in one month could lead to a total calculation of 31 days.

D. **Voyage Payroll - Accumulated**

If you select this option, a payroll is generated for every assignment within one month. The total number of payment days for all assignments is accumulated. A maximum number of 30 days is paid.

When calculating the payroll, the last applicable person history period days are either extended or cut.

ii. **Calculation - Regular**

Select one of the following options from the drop-down list:

A. **Default (30 Days)**

By default, this option is selected. The payroll is calculated using 30 days.

B. **30 Days**

If you select this option, each payroll is calculated using 30 days.

C. **Exact Days**

If you select this option, each payroll is calculated using the exact number of days of the respective month.

iii. **Forward Balancing**

Select one of the following options from the drop-down list:



**NOTE**

Balances for voyage employees are only forwarded if they belong to one assignment.

So if a residual balance is available after an assignment has ended, it has to be forwarded to a new assignment manually.

A. **Default (Enabled)**

By default, this option is selected.

The payroll balance is forwarded to the next payroll month.

B. **Enabled**

If you select this option, the payroll balance is forwarded to the next payroll month.

C. **Disabled**

If you select this option, the payroll balance isn't forwarded to the next payroll month. Every next payroll month starts with a balance of zero.

iv. **Paid Out**

Define whether paid-out positions should be available in your payrolls or not.

**NOTE**

This setting is linked with the setting defined for **Forward Balancing**.

The following combinations are possible:

1. **Forward Balancing: Enabled, Paid Out: Enabled**  
The position is displayed on the **Final Wages** tab for final payrolls, only.
2. **Forward Balancing: Disabled, Paid Out: Enabled**  
The position is available for all payrolls and is thus displayed on the **Monthly Wages** and **Final Wages** tabs.
3. **Paid Out: Disabled**  
The position is not available for any payroll.

A. **Enabled**

If you select this option, the paid-out position is available for payrolls. Whether it is available for final wages and monthly wages, both, depends on the setting defined for **Forward Balancing**.

B. **Disabled**

If you select this option, the paid-out position is not available for any payrolls.

v. **Copy Balance to Paid Out**

Define whether the remaining balance should be automatically copied to the paid out position of the next month automatically once the current payroll is finalized.

The balance is only copied to the paid out position if it is not negative and a paid out position exists with a zero amount.

A. **Enabled**

If you select this option, the balance of the current month is automatically copied to the paid out position of the next month once the current payroll is finalized.

B. **Disabled**

If you select this option, the balance is not copied automatically.

d. **Wage Options**

The screenshot shows a window titled "Edit Custom Payroll Settings" with a close button in the top right corner. On the left, there is a sidebar with four tabs: "Valid from / for", "Payroll calculation method", "Wage options" (which is highlighted in green), and "Allotment options". The main area contains several dropdown menus and checkboxes arranged in two columns. The settings are as follows:

- Wage confirmation:** Automatic confirmation (all wages)
- Split wages:** Monthly per rank (calendar year)
- Promotion wages:** Enabled
- Include newly promoted in split per rank calculation:** Enabled
- Include past sea services:** Disabled
- Company bonus:** Calendar year
- Wages - Multiple split/bonus:** Enabled
- Wages - Multiple versions:** Enabled
- Payment type:** Seafarer bank
- Bank payments:** Disabled

At the bottom right of the window, there are three buttons: "CANCEL", "CONFIRM", and "SAVE".

In this section, you define the different handling of wages that impact how wage scales can be configured and are actually calculated within a permanent contract or voyage assignment.

i. **Wage Confirmation**

Define how a wage should be confirmed.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Manual Confirmation**

If you select this option, all wages have to be confirmed manually using a four-eyes principle.

At least one user must be assigned the right to confirm the wages.

Wages that are assigned to your user for confirmation are displayed on the dashboard list [My Wages to Check](#).

C. **Automatic Confirmation (Only New Wages)**

If you select this option, you have to confirm new wages manually, first. After they have been confirmed manually once, all new versions of a wage, such as split wages, new bonus levels, or newly valid wage versions, are automatically confirmed by the application.

D. **Automatic Confirmation (All Wages)**

If you select this option, all wages are automatically confirmed by the application.

Auto-confirmation takes place shortly prior to the assignment start.

ii. **Split Wages**

You can define that wage scales include split wages that apply automatically within an assignment period, if the seafarer reaches a specific number of months (sea service or calendar year) in a specific rank.

- A. **Default**  
The default setting is taken from the last version of payroll settings.
- B. **None**  
If you select this option, split wages won't apply.
- C. **Monthly per Assignment**  
If you select this option, split wages are calculated based on each individual assignment period.

### **Example 1. Wage Increase**

After two months on board a vessel, a seafarer gets an increase in his basic wage. So he will be paid with this new wage for the remaining portion of his assignment.

For the next assignment, a seafarer assigned to this wage again starts with the initial wage.

- D. **Monthly per Rank (Assignment Time)**  
If you select this option, the assignment time of each assignment is considered for the calculation of split wages.

### **Example 2. Sea Service**

A master gets a basic wage of 1200 Euros for 0 to 6 months of sea service experience and a basic wage of 1800 Euros for 6 to 10 months of sea service experience. Once a total amount of 6 months sea service for all assignments in this rank has been achieved, the new basic wage becomes effective.

- E. **Monthly per Rank (Calendar Year)**  
If you select this option, the employment period of the seafarer based on calendar years is considered for the calculation of split wages.

### **Example 3. Years of Experience**

A master gets a basic wage of 1500 Euros for 0 to 5 years of employment within the same company and a basic wage of 2000 Euros for 5 to 10 years of employment. Once a total amount of 5 years employment period has been achieved in this rank, the new basic wage becomes effective.

### iii. **Promotion Wages**

Define whether to allow promotion wages for a seafarer serving in a specific rank for the first time.

**NOTE**

This setting is not available, if you've selected **None** for split wages.

Once you've set up a promotion wage, both the basic wage and the promotion wage appear in the list of available wage scales that you can assign to a seafarer.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, you can set up promotion wages.

C. **Disabled**

If you select this option, you aren't allowed to set up promotion wages.

iv. **Include Newly Promoted In Split Per Rank Calculation**

Define whether newly promoted seafarers should be included in the calculation of split wages according to rank.

**NOTE**

This setting is only available, if you've defined **Monthly per Rank (Assignment Time)** or **Monthly per Rank (Calendar Year)** for split wages under step ii.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, you can include newly promoted seafarers in the calculation of split wages according to rank.

C. **Disabled**

If you select this option, you cannot include newly promoted seafarers in the calculation of split wages according to rank.

v. **Include Past Sea Services**

Define whether to consider past sea services with previous shipping companies when calculating split wages.

**NOTE**

This setting is only available, if you've defined **Monthly per Rank (Assignment Time)** or **Monthly per Rank (Calendar Year)** for split wages under step ii.

- A. **Default**  
The default setting is taken from the last version of payroll settings.
  - B. **Enabled**  
If you select this option, past sea services with previous shipping companies are considered when calculating split wages.
  - C. **Disabled**  
If you select this option, past sea services with previous shipping companies aren't considered when calculating split wages.
- vi. **Company Bonus**  
Define whether to allow the creation of monthly company bonuses that are applicable after a certain time of service. The time of service is either calculated by assignment time or in calendar years.
- A. **Default**  
The default setting is taken from the last version of payroll settings.
  - B. **None**  
If you select this option, you cannot create any monthly company bonuses within a rank-specific wage scale.
  - C. **Assignment Time**  
If you select this option, you can create a monthly company bonus that is applicable after a specific time of service calculated over the entire assignment time.
  - D. **Calendar Year**  
If you select this option, you can create a monthly company bonus that is applicable after a certain number of employment years calculated in calendar years.
- vii. **Wages - Multiple Split/Bonus**  
Define whether an assignment may hold multiple wages and/or amounts for different company bonus years throughout the assignments.
- A. **Default**  
The default setting is taken from the last version of payroll settings.
  - B. **Enabled**  
If you select this option, an assignment can hold multiple wages (split wages) and/or amounts for different company bonus years throughout the assignment.
  - C. **Disabled**  
If you select this option, an assignment cannot hold multiple wages (split wages) and/or amounts for different company bonus years throughout the assignments.  
Only those split wages or company bonuses are applied that are effective on the start date of the assignment or permanent contract.
- viii. **Wages - Multiple Versions**

Define whether an assignment can hold multiple wages derived from different wage scale versions.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, an assignment can include multiple wages derived from different wage scale versions.

New wage versions are displayed with the date they became effective throughout the assignment.

C. **Disabled**

If you select this option, an assignment cannot include multiple wages derived from different wage scale versions.

The system applies the wage version that is applicable as of the start date of the assignment or permanent contract.

ix. **Payment Type**

Define which kind of information the payroll API should deliver regarding the payment recipient.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Seafarer Bank**

If you select this option, you can retrieve information whether a payment to a seafarer (home allotment, special allotment, paid out) should be remitted to the seafarer bank.

C. **Agency Bank**

If you select this option, you can retrieve information whether a payment to a seafarer (home allotment, special allotment, paid out) should be remitted to the bank account of the related manning agency.

x. **Bank Payments**

Define whether you're allowed to maintain bank accounts for your fleet and create bank files.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, you can maintain bank accounts for your fleet and create bank files (.DTAZV , SEPA and MarTrust) for payments (home allotment, special allotment, paid out) as a combination of the applicable vessel bank account and the seafarer bank account.

The following areas are available once you enabled this setting: **Settings > Payment Banks** and **Payroll > Bank Payments**. Of course provided that the user has been granted the relevant access hereto.

For more information, see [Payment Banks \[41\]](#) and [Bank Payments](#).

C. **Disabled**

If you select this option, you cannot maintain bank accounts for your fleet and create bank files.

e. **Allotment Options**

The screenshot shows a dialog box titled "Edit Custom Payroll Settings". On the left is a sidebar with menu items: "Valid from / for", "Payroll calculation method", "Wage options", and "Allotment options" (which is highlighted in green). The main area contains a table of settings:

Home Allotment	Enabled	H/A - Start Month	Enabled
H/A - End Month	Enabled	H/A - Start+End Month	Enabled
Require allotment confirmation	Disabled	Update later payrolls on allotment change	Disabled

At the bottom right of the dialog are three buttons: "CANCEL", "CONFIRM", and "SAVE".

In this section, you define the different allotment options.

i. **Home Allotment**

Defines whether home allotment positions are included in your payrolls or not.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, home allotment positions are included in your payrolls.

C. **Disabled**

If you select this option, home allotments are not included in your payrolls.

ii. **H/A - Start Month**

Allows you to automatically set the home allotment value to 0 during the on-signing month. This setting prevents overpayments to the seafarer in the first month of service.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, the home allotment value is automatically set to 0 during the onsigning month.

C. **Disabled**

If you select this option, the home allotment value is **not** automatically set to 0 during the onsigning month.



iii. **H/A - End Month**

Allows you to automatically set the home allotment value to 0 during the off-signing month. This setting prevents overpayments to the seafarer in the last month of service.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, the home allotment value is automatically set to 0 during the offsigning month.

C. **Disabled**

If you select this option, the home allotment value is **not** automatically set to 0 during the offsigning month.

iv. **H/A - Start+End Month**

Allows you to automatically set the home allotment value to 0 when a seafarer is signing on and off during the same month. This setting prevents overpayments to the seafarer.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, the home allotment value is automatically set to 0 when a seafarer is signing on and off during the same month.

C. **Disabled**

If you select this option, the home allotment is **not** automatically set to 0 when a seafarer is signing on and off during the same month.

v. **Require Allotment Confirmation**

Define that allotment positions must be confirmed by the office and can no longer be edited after confirmation.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, allotment positions must be confirmed by the office.

C. **Disabled**

If you select this option, allotment positions do **not** have to be confirmed by the office and are considered as specified once a value was entered.

vi. **Update Later Payrolls on Allotment Change**

Define that updating a home allotment amount changes the amounts of later home allotments to the same amount.

A. **Default**

The default setting is taken from the last version of payroll settings.

B. **Enabled**

If you select this option, updating home allotment amounts changes the amounts for later home allotments to the same amount provided that later home allotments have not been changed manually, already.

C. **Disabled**

If you select this option, updating home allotment amounts does **not** change the amounts for later home allotments to the same amount.

4. Choose **Save** to save your changes.
5. Choose **Confirm** to validate the new version.

**NOTE**

Versions of payroll settings that have been confirmed, can no longer be edited.

6. Confirm the warning message by choosing **Yes**.

### 1.1.3. Add Payroll Earnings / Deductions

1. Go to **Settings > Payrolls > Payroll Settings > Paycodes**.
2. On the **Payroll Earnings** or **Payroll Deductions** card, choose **Add** to create a new entry.

**TIP**

You can also export the list of earnings or deductions, by choosing the **⋮** more menu and then **Export** from each card.

To hide inactive earnings or deductions, choose the **⋮** more menu and then **Hide inactive** from each card.

**NOTE**

To edit existing payroll earnings or deductions, select an entry from the list and choose **Edit**.

Note that entries with a **🔒** padlock icon are either predefined by the system or in use and therefore, cannot be deleted.

3. In the dialog window, enter the following data:
  - a. **Name**  
Specify a name for the new payroll earning or deduction.
  - b. **Manual Time Entry**  
Allows you to name the unit which will be multiplied by the specific seafarer wage rate within the payroll.

c. **Include in payroll by default**

If you select this checkbox, the payroll earning or deduction is included in every payroll by default as long as it's not predefined as a **Monthly Amount** or **Absolute Amount**.

For these paycodes a value can then be entered manually for each seafarer's payroll of a certain month.

**TIP**

To keep your payroll section clean, make sure to activate this option only for paycodes that occur regularly for the majority of seafarers.

Deactivate this option for bonuses that are paid only occasionally for specific seafarers, for example.

When additionally defined as **Monthly Amount** or **Absolute Amount**, the paycode matrix of a wage scale lists those paycodes, by default.

d. **Monthly Amount**

If you select this checkbox, you can enter an amount in the wage scale for this payroll earning or deduction. The amount that is defined in the wage scale is calculated on a pro rata basis.

Once you select this checkbox, another checkbox appears next to it: **Absolute Amount**

e. **Absolute Amount**

Only visible, if you select the **Monthly Amount** checkbox.

If you select the **Absolute Amount** checkbox, the amount defined in the wage scale will be paid in full once per month.

f. **Account Numbers**

Account numbers are displayed for all currencies used within wage scales. If you want to enable that more account numbers can be entered for other currencies, you have to define at least one wage scale with the new currency before.

Once you have defined a currency in the wage scales, you are able to insert an account number in this dialog window, which can then be retrieved from the payroll API.

g. **Deactivated**

If you select this checkbox, the payroll earning or deduction that you're currently creating or editing is deactivated. The payroll earning or deduction can, thus no longer be used for any wage scales, but is still displayed for all running assignments and their corresponding payrolls.

4. Choose **Save** to save your changes.

## 1.2. Wage Scales

On the **Wage Scales** subtab, you can create, edit, and delete wage scale groups and create rank-specific wage scales.


The screenshot displays the 'Wage Scales' subtab in the CFM Crewing system. On the left, there is a list of wage scales with a 'History' dropdown for each. The main area shows the details for the 'International Contract Officers' wage scale, which is effective from 10/01/2019. The details include the currency (Euro), Max O/T (0), and Leave days (1). Below this, there is a table showing the breakdown of earnings and deductions for two ranks: MASTER and CHIEF OFFICER.

Rank	Days	Basic wage	Fixed overtime	Tanker allowance	Government Contribution	Pension Contribution	Total
MASTER	1	10,000.00	1,000.00	500.00	0	0	11,500.00
CHIEF OFFICER	1	8,000.00	1,000.00	500.00	10.00	15.00	9,525.00

Wage scales are predefined templates allocated to seafarer assignments (voyage employees) or seafarer contracts (permanent employees). The wage scale content is used to generate the seafarers' payroll. All values that were entered are used for the automatic calculation of the individual seafarer's payroll.

The wage scales are sorted according to type: **Voyage** or **Permanent**.

The **History** drop-down list next to an entry in the **Wage Scales** list allows you to select future or previous versions of a wage scale, if available. Select one from the list to edit it.

The  padlock icon indicates that the wage scale cannot be deleted. You can, however, archive the wage scale. To do so, select a wage scale from the list and choose **Edit > Archive**. Archived wage scales are then marked with a **red** stripe. It is also not possible to edit the **Effective as of** date. To make changes, you have to create a new version of the wage scale. To do so, select a wage scale from the list and choose **Add > Add wage scale version**.

On the detail screen on the right, you can create rank-specific wage scales as well as edit, delete, and copy existing rank-specific wage scales. The different earnings and deductions are only displayed if they were assigned to at least one person history type within the pay code matrix.

### 1.2.1. Create Wage Scale Groups

1. Go to **Settings > Wage Scales**.
2. In the **Wage Scales** list on the left, choose **Add** and select **New Voyage Wage Scale** or **New Permanent Wage Scale** from the drop-down list.

3. In the dialog window, enter the following data:
  - a. **Name**  
Specify a name for the new wage scale.
  - b. **Max. O/T Hours (Per Month)** (optional)  
Define the maximum number of overtime hours a seafarer may generate each month.
  - c. **Leave Pay Days (Per Month)** (optional)  
Define how many paid leave days a seafarer may have each month.
  - d. **Per Day** (optional)  
If you select this checkbox, the paid leave days are calculated for each day within a defined person history period.
  - e. **Currency**  
Select the relevant currency for the wage scale from the drop-down list.
  - f. **Max. Negative Leave (Days)** (optional)  
Enter the maximum number of negative leave days. Once this parameter is defined, the maximum number of negative leave days are limited to the defined value.

**NOTE**

This setting is only relevant for seafarers with permanent contracts.

- g. **Max. Assignment Length (Weeks)** (optional)  
Specify the maximum duration of the assignment in weeks.
- h. **Effective as of**  
Enter a month on which the wage scale becomes effective.
- i. **Minimum Home Allotment Percentage** (optional)  
Define the minimum amount for home allotments in percent based on the seafarer's basic wage that has to be paid each month.

**Example 1. Home Allotment**

A Filipino seafarer should receive 80% of their basic wage in a monthly home allotment.

This setting is used in the **Home Allotment** section to indicate whether the actual home allotment amount is sufficient.

- j. **Guaranteed Home Period (%)** (optional)  
Enter a home period that is guaranteed to the seafarers after their assignment.
- k. **Override Training Leave Days** (optional)  
Use these fields to override the settings made in the pay code matrix regarding training leave days of a seafarer.

**NOTE**

This setting is only relevant for seafarers with permanent contracts.

- i. Choose whether the setting is to be valid for all trainings during a **year** or within a certain training **period**.
  - ii. Select one of the following values from the drop-down list:
    - A. **Earn Leave Days**  
Select this value if the seafarer should earn additional leave days while he is on training.
    - B. **Spend Leave Days**  
Select this value if the seafarer should spend leave days while he is on training.
    - C. **Neutral**  
Select this value if it shouldn't have any effect.
  - iii. Enter a number in the **for first xxx days** field.  
You thereby define how long your setting is valid before the pay code matrix becomes effective again.
- I. **Override Embarkation Travel Leave Days (Per Assignment)** (optional)  
Use these fields to override the settings made in the pay code matrix regarding embarkation travel leave days of a seafarer.

**NOTE**

This setting is only relevant for seafarers with permanent contracts.

- i. Select one of the following values from the drop-down list:
    - A. **Earn Leave Days**  
Select this value if the seafarer should earn additional leave days while he is traveling.
    - B. **Spend Leave Days**  
Select this value if the seafarer should spend leave days while he is traveling.
    - C. **Neutral**  
Select this value if it shouldn't have any effect.
  - ii. Enter a number in the **for first xxx days** field.  
You thereby define how long your setting is valid before the pay code matrix becomes effective again.
- m. **Do not apply to seafarers currently on board** (optional)  
Select this checkbox, if you don't want to apply the new wage scale (version) to the seafarers that are currently on board a vessel.

n. **Is specific for vessel** (optional)

Select this checkbox, if you want to apply the new wage scale to specific vessels, only.

From the list of vessels that appears select the relevant ones.



**NOTE**

Note that the wage scale group can only be allocated to assignments on the vessels selected in this step.

When allocating wage scales to assignments, you still see all other wage scales that are not specific to the vessels selected in this step.

o. **Is specific for nationality** (optional)

Select this checkbox, if you want to apply the new wage scale to specific nationalities, only.

From the list of nationalities that appears select the relevant ones.



**NOTE**

Note that the wage scale group can only be allocated to assignments with seafarers of the nationalities selected in this step.

When allocating wage scales to assignments, you still see all other wage scales that are not specific to the nationalities selected in this step.

4. Choose **Edit Pay Code Matrix** to assign the pay codes to the relevant person history types.

In the dialog window, select which pay codes are relevant for which person history type.

Person history types are specific activities that apply to a seafarer for a certain time period, such as **Traveling, On Board**, or **Vacation**. For every activity, you can define which paycode is relevant and should take effect.

For voyage wage scales only person history types can be selected that are directly connected to an assignment, such as **Traveling, On Board** or **Illness**. For permanent wage scales all person history types are displayed as they could all potentially be paid even outside of an assignment.



**NOTE**


You define pay codes in **Settings** under **Payrolls** > **Paycodes**.

**CAUTION**

Carefully go through the steps below, as setting up the paycode matrix is error-prone and can turn out to be the main source of error for wrong payrolls.

Wage scales can only be calculated if a person history type is assigned to a paycode. Only then can you specify the relevant amounts for the paycode in the rank-specific wage scales. For more information, see [Add Wage Scales - Ranks \[37\]](#).

1. You can filter the list for paycodes and different person history types by entering the specific names in the **Filter Paycodes** and **Filter Types** field.
2. By default, the system shows any paycodes that are specified as a monthly or absolute amount and where **Include in payroll by default** was activated.

To extend the list of available paycodes, choose the **Edit Paycodes**  drop-down list and select additional paycodes from the drop-down list. Additionally displayed paycodes that were not assigned to any person history type are removed from this view automatically once you close the paycode matrix.

You can add paycodes to the matrix that you defined in **Settings** under **Payrolls > Paycodes**.

**NOTE**

Only paycodes that were defined as **Monthly Amount** and **Absolute Amount** can be added here.

Paycodes that are already selected and appear with a gray checkbox are set by default and cannot be excluded from the paycode matrix.

3. Choose **Save** to save your changes.

If you're editing the paycode matrix after you already set up your entire payroll process and it's also already up and running, the changes won't have any effect on finalized payrolls. Open payrolls are automatically regenerated with a delay.

5. Once you're finished specifying all relevant parameters, choose **Save** to create the new wage scale group.

### 1.2.2. Add Wage Scale Versions

A new version of a wage scale group allows you to keep the basic data of the original wage scale group and adapt certain values that are relevant to future assignments of seafarers, for example.

Unlike a copy, the version keeps the same name as its original and is allocated to the same seafarers as the original - if set up this way - once it becomes effective.



1. Go to [Settings > Wage Scales](#).
2. In the [Wage Scales](#) list on the left, select a wage scale and choose [Add > Add Wage Scale Version](#) from the drop-down list.
3. All values are taken over from the previous wage scale version.
4. In the dialog window, you can adapt the same values as during the creation of a wage scale except for the name.  
The name of the new wage scale version is copied from the previous wage scale version.

**TIP**

Check carefully whether all values especially the paycode matrix or wages for specific ranks should be copied from the previous wage scale version to the new version or need to be adapted.

For detailed information on the different values, see [Create Wage Scale Groups](#). [20]

5. Once you're finished specifying all relevant parameters, choose [Save](#) to create the new wage scale version.

### 1.2.3. Copy Wage Scale Groups

A **copy** of a wage scale group creates an exact copy of the original wage scale group, but with a different name.

Unlike a new **version** of a wage scale group, a copy is not automatically applied to the seafarers of the original wage scale group. It needs to be specified for ranks and assigned, accordingly.

1. Go to [Settings > Wage Scales](#).
2. In the [Wage Scales](#) list on the left, select a wage scale group and choose [Add > Copy Wage Scale](#) from the drop-down list.
3. The system creates an exact copy of the selected wage scale group, but with a different name.  
By default, - **copy** is added to the name of the wage scale group.

**TIP**

You won't be able to save the copy of your wage scale group if you use the same name as the original wage scale. Choose a different name.

4. Choose [Edit Pay Code Matrix](#) to assign the pay codes to the relevant person history types.
5. In the dialog window, select which pay codes are relevant for which person history type.  
Person history types are specific activities that apply to a seafarer for a certain time period, such as [Traveling, On Board](#), or [Vacation](#). For every activity, you can define which paycode is relevant and should take effect.

For voyage wage scales only person history types can be selected that are directly connected to an assignment, such as [Traveling](#), [On Board](#) or [Illness](#). For permanent wage scales all person history types are displayed as they could all potentially be paid even outside of an assignment.

**NOTE**

You define pay codes in [Settings](#) under [Payrolls](#) > [Paycodes](#).

**CAUTION**

Carefully go through the steps below, as setting up the paycode matrix is error-prone and can turn out to be the main source of error for wrong payrolls.

Wage scales can only be calculated if a person history type is assigned to a paycode. Only then can you specify the relevant amounts for the paycode in the rank-specific wage scales. For more information, see [Add Wage Scales - Ranks \[37\]](#).

1. You can filter the list for paycodes and different person history types by entering the specific names in the [Filter Paycodes](#) and [Filter Types](#) field.
2. By default, the system shows any paycodes that are specified as a monthly or absolute amount and where [Include in payroll by default](#) was activated.

To extend the list of available paycodes, choose the [Edit Paycodes](#) ▾ drop-down list and select additional paycodes from the drop-down list. Additionally displayed paycodes that were not assigned to any person history type are removed from this view automatically once you close the paycode matrix.

You can add paycodes to the matrix that you defined in [Settings](#) under [Payrolls](#) > [Paycodes](#).

**NOTE**

Only paycodes that were defined as [Monthly Amount](#) and [Absolute Amount](#) can be added here.

Paycodes that are already selected and appear with a gray checkbox are set by default and cannot be excluded from the paycode matrix.


3. Choose [Save](#) to save your changes.

If you're editing the paycode matrix after you already set up your entire payroll process and it's also already up and running, the changes won't have any effect on finalized payrolls. Open payrolls are automatically regenerated with a delay.

6. Choose [Save](#) to save your changes.


## 1.2.4. Edit Wage Scale Groups

1. Go to [Settings](#) > [Wage Scales](#).
2. Select a wage scale from the [Wage Scales](#) list on the left and choose [Edit](#).
3. You can change data on the following tabs:
  - a. **Standard**  
 You can edit all fields that appear on this tab, except for the [Currency](#) and the [Effective as of](#) date.  
 For more information on the different fields, see [Create Wage Scale Group \[20\]](#).
  - b. **Payroll Settings**  
 You can choose to do the following on this tab:
    - i. **Add**  
 Add new payroll settings to your wage scale group.  
 The payroll settings defined here are only relevant for seafarers that are assigned to the selected wage scale group and meet the defined settings, such as nationality-specific settings.
    - ii. **Edit**  
 Edit an existing payroll setting for your wage scale group.
 



**NOTE**

You can only edit an existing payroll setting, if it hasn't been confirmed, yet.
    - iii. **Delete**  
 Delete a payroll setting for your wage scale group.
 



**NOTE**

You can only delete an existing payroll setting, if it hasn't been confirmed, yet.
    - iv. **Show**  
 To display the details of an existing payroll setting, choose an entry from the list and choose [Show](#).
4. To archive the wage scale because you created a new wage scale or a new wage scale version, choose [Archive](#).
5. Choose [Save](#) to save your changes.

### 1.2.4.1. Add Payroll Settings

1. Under [Settings](#) > [Wage Scales](#), select a wage scale group and choose [Edit](#).

2. Navigate to the **Payroll Settings** tab and choose **Add**.
3. On the **Valid From / For** tab in the dialog window, enter the following data:

Add payroll Settings
✕

Valid from / for

Payroll calculation method

Wage options

Allotment options

Valid from \*  
December 2020 📅

Valid for Nationality \*  
Default ▼

Valid for Agency \*  
Default ▼

Rank type \*  
Both (Default) ▼

Remark

Please save the setting version to continue

CANCEL
SAVE

- a. **Valid From**  
Select a month from which the payroll settings should be valid.
- b. **Valid for Nationality**  
Define whether the payroll settings of this wage scale should be applied to a certain nationality or to all seafarers.
  - i. **Default**  
By default, this option is selected which means that the payroll settings apply to all seafarers no matter which nationality they have.
  - ii. A specific nationality selected from the drop-down list.  
The payroll settings are then only applied to seafarers assigned to this wage scale and that are of the selected nationality.
- c. **Valid for Agency**  
Define whether the payroll settings should be applied to seafarers belonging to a certain agency or to all seafarers.  
The colored circles in front of the agency's names indicate the status of the agency. **Green** means that the agency is active. **Red** means that the agency is inactive.
  - i. **Default**  
By default, this option is selected which means that the payroll settings apply to all seafarers no matter to which agency they belong.
  - ii. A specific agency selected from the drop-down list.  
The payroll settings are then only applied to seafarers assigned to this wage scale and that are of the selected nationality.
- d. **Rank Type**  
Define whether the payroll settings should be applied to seafarers with a specific rank type.

i. **Both (Default)**

By default, this option is selected which means that the payroll settings apply to all seafarers independent of their rank type.

ii. **Officer**

If you select this option, the payroll settings are applied to seafarers with the rank type **Officer** only.

iii. **Rating**

If you select this option, the payroll settings are applied to all seafarers whose rank is **not** marked as **Is Officer**.

e. **Remark**

Enter any additional remarks into this field.

4. Choose **Save** to continue defining the remaining payroll settings.

5. On the **Payroll Calculation Method** tab in the dialog window, enter the following data:

The screenshot shows a dialog window titled "Edit payroll Settings" with a close button (X) in the top right corner. On the left is a sidebar with four tabs: "Valid from / for", "Payroll calculation method" (highlighted in green), "Wage options", and "Allotment options". The main area contains three dropdown menus: "Forward balancing" (set to "Default"), "Paid out" (set to "Default"), and "Copy balance to paid out" (set to "Default"). At the bottom right, there are three buttons: "CANCEL", "CONFIRM", and "SAVE".

a. **Forward Balancing**

Define whether a payroll balance should be forwarded to the next payroll month, by selecting a value from the drop-down list:

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Payroll Calculation Method**.

You can overwrite the default by selecting another value for this wage scale.

ii. **Enabled**

If you select this option, the payroll balance is forwarded to the next payroll month.

iii. **Disabled**

If you select this option, the payroll balance isn't forwarded to the next payroll month. Every next payroll month starts with a balance of zero.

b. **Paid Out**

Define whether paid-out positions should be available in your payrolls or not.

**NOTE**

This setting is linked with the setting defined for **Forward Balancing**.

The following combinations are possible:

1. **Forward Balancing: Enabled, Paid Out: Enabled**  
The position is displayed on the **Final Wages** tab for final payrolls, only.
2. **Forward Balancing: Disabled, Paid Out: Enabled**  
The position is available for all payrolls and is thus displayed on the **Monthly Wages** and **Final Wages** tabs.
3. **Paid Out: Disabled**  
The position is not available for any payroll.

i. **Enabled**

If you select this option, the paid-out position is available for payrolls.

Whether it is available for final wages and monthly wages, both, depends on the setting defined for **Forward Balancing**.

ii. **Disabled**

If you select this option, the paid-out position is not available for any payrolls.

c. **Copy Balance to Paid Out**

Define whether the remaining balance should be automatically copied to the paid out position of the next month automatically once the current payroll is finalized.

The balance is only copied to the paid out position if it is not negative and a paid out position exists with a zero amount.

i. **Enabled**

If you select this option, the balance of the current month is automatically copied to the paid out position of the next month once the current payroll is finalized.

ii. **Disabled**

If you select this option, the balance is not copied automatically.

6. On the **Wage Options** tab in the dialog window, enter the following data:

The screenshot shows a dialog window titled "Edit payroll Settings". On the left, there is a sidebar with tabs: "Valid from / for", "Payroll calculation method", "Wage options" (highlighted), and "Allotment options". The main content area contains six dropdown menus arranged in two columns. The first column includes "Wage confirmation" (Default), "Wages - Multiple split/bonus" (Default), and "Payment type" (Default). The second column includes "Split wages" (Default), "Wages - Multiple versions" (Default), and "Company bonus" (Default). At the bottom right, there are three buttons: "CANCEL", "CONFIRM", and "SAVE".

a. **Wage Confirmation**

You can define how this specific wage scale should be confirmed by selecting a value from the drop-down list:

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options**.

You can overwrite the default by selecting another value for this wage scale.

ii. **Manual Confirmation**

If you select this option, all wages have to be confirmed manually using a four-eyes principle.

At least one user must be assigned the right to confirm the wages.

iii. **Automatic Confirmation (Only New Wages)**

If you select this option, you have to confirm new wages manually, first. After they have been confirmed manually once, all new versions of a wage, such as split wages, new bonus levels, or newly valid wage versions, are automatically confirmed by the application.

iv. **Automatic Confirmation (All Wages)**

If you select this option, all wages are automatically confirmed by the application.

Auto-confirmation takes place shortly prior to the assignment start.

b. **Split Wages**

You can define that wage scales include split wages that apply automatically within an assignment period, if the seafarer reaches a specific number of months (sea service or calendar year) in a specific rank.

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options**.

You can overwrite the default by selecting another value for this wage scale.

ii. **None**

If you select this option, split wages won't apply.

iii. **Monthly per Assignment**

If you select this option, split wages are calculated based on each individual assignment period.

iv. **Monthly per Rank (Assignment Time)**

If you select this option, the assignment time of each assignment is considered for the calculation of split wages.

### Example 1. Assignment Time

A master gets a basic wage of 1200 Euros for 0 to 6 months of sea service experience and a basic wage of 1800 Euros for 6 to 10 months of sea service experience. Once a total amount of 6 months sea service for all assignments in this rank has been achieved, the new basic wage becomes effective.

v. **Monthly per Rank (Calendar Year)**

If you select this option, the employment period of the seafarer based on calendar years is considered for the calculation of split wages.

### Example 2. Calendar Year

A master gets a basic wage of 1500 Euros for 0 to 5 years of employment within the same company and a basic wage of 2000 Euros for 5 to 10 years of employment. Once a total amount of 5 years employment period has been achieved in this rank, the new basic wage becomes effective.

c. **Promotion Wages**

Define whether to allow promotion wages for a seafarer serving in a specific rank for the first time.



#### NOTE

This setting is not available, if you've selected **None** for split wages.

Once you've set up a promotion wage, both the basic wage and the promotion wage appear in the list of available wage scales that you can assign to a seafarer.

i. **Default**

The default setting is taken from the last version of payroll settings.

ii. **Enabled**

If you select this option, you can set up promotion wages.



iii. **Disabled**

If you select this option, you aren't allowed to set up promotion wages.

d. **Include Past Sea Services**

Define whether to consider past sea services with previous shipping companies when calculating split wages.

**NOTE**

This setting is only available, if you've defined **Monthly per Rank (Assignment Time)** or **Monthly per Rank (Calendar Year)** for split wages under step ii.

i. **Default**

The default setting is taken from the last version of payroll settings.

ii. **Enabled**

If you select this option, past sea services with previous shipping companies are considered when calculating split wages.

iii. **Disabled**

If you select this option, past sea services with previous shipping companies aren't considered when calculating split wages.

e. **Wages - Multiple Split/Bonus**

Define whether an assignment may hold multiple wages and/or amounts for different company bonus years throughout the assignments.

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options**.

You can overwrite the default by selecting another value for this wage scale.

ii. **Enabled**

If you select this option, an assignment can hold multiple wages (split wages) and/or amounts for different company bonus years throughout the assignment. For confirmed wages, new and valid split wages as well as applicable company bonuses are automatically assigned to the seafarers once they become effective.

iii. **Disabled**

If you select this option, an assignment cannot hold multiple wages (split wages) and/or amounts for different company bonus years throughout the assignments.

f. **Wages - Multiple Versions**

Define whether an assignment can hold multiple wages derived from different wage scale versions.

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options**.

ii. **Enabled**

If you select this option, an assignment can include multiple wages derived from different wage scale versions.



**TIP**

The versions are also applied to seafarers that are already on board a vessel.

To change this, select the checkbox **Do not apply to seafarers currently on board** when creating a wage scale group. For more information, see [Create Wage Scale Group \[20\]](#).

New wage versions are displayed with the date they became effective throughout the assignment.

iii. **Disabled**

If you select this option, an assignment cannot include multiple wages derived from different wage scale versions.

g. **Payment Type**

Define which kind of information the payroll API should deliver regarding the payment recipient.

i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options](#).

ii. **Seafarer Bank**

If you select this option, you can retrieve information whether a payment to a seafarer (home allotment, special allotment, paid out) should be remitted to the seafarer bank.

iii. **Agency Bank**

If you select this option, you can retrieve information whether a payment to a seafarer (home allotment, special allotment, paid out) should be remitted to the bank account of the related manning agency.

h. **Company Bonus**

Define whether to allow the creation of monthly company bonuses that are applicable after a certain time of service. The time of service is either calculated by assignment time or in calendar years.

i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Wage Options](#).

ii. **None**

If you select this option, you cannot create any monthly company bonuses within a rank-specific wage scale.

**NOTE**

The **Company Bonus** tab is then also not displayed.

iii. **Assignment Time**

If you select this option, you can create a monthly company bonus that is applicable after a specific time of service calculated over the entire assignment time.

iv. **Calendar Year**

If you select this option, you can create a monthly company bonus that is applicable after a certain number of employment years calculated in calendar years.

7. On the **Allotment Options** tab in the dialog window, enter the following data:

Setting	Value
Home Allotment	Default
Require Allotment confirmation	Default
Update later payrolls on allotment change	Default
H/A - Start Month	Default
H/A - End Month	Default
H/A - Start+End Month	Default

a. **Home Allotment**

Defines whether home allotment positions are included in your payrolls or not.

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options**.

ii. **Enabled**

If you select this option, home allotment positions are included in your payrolls.

iii. **Disabled**

If you select this option, home allotments are not included in your payrolls.

b. **Require Allotment Confirmation**

Define that allotment positions must be confirmed by the office and can no longer be edited after confirmation.

- i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options](#).
- ii. **Enabled**

If you select this option, allotment positions must be confirmed by the office.
- iii. **Disabled**

If you select this option, allotment positions do **not** have to be confirmed by the office and are considered as specified once a value was entered.
- c. **Update Later Payrolls on Allotment Change**

Define that updating a home allotment amount changes the amounts of later home allotments to the same amount.

  - i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options](#).
  - ii. **Enabled**

If you select this option, updating home allotment amounts changes the amounts for later home allotments to the same amount provided that later home allotments have not been changed manually, already.
  - iii. **Disabled**

If you select this option, updating home allotment amounts does **not** change the amounts for later home allotments to the same amount.
- d. **H/A - Start Month**

Allows you to automatically set the home allotment value to 0 during the onsigning month. This setting prevents overpayments to the seafarer in the first month of service.

  - i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options](#).
  - ii. **Enabled**

If you select this option, the home allotment value is automatically set to 0 during the onsigning month.
  - iii. **Disabled**

If you select this option, the home allotment is not automatically set to 0 during the onsigning month.
- e. **H/A - End Month**

Allows you to automatically set the home allotment value to 0 during the offsigning month. This setting prevents overpayments to the seafarer in the last month of service.

  - i. **Default**

This value is selected by default. It is the setting that you defined under [Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options](#).

ii. **Enabled**

If you select this option, the home allotment value is automatically set to 0 during the offsigning month.

iii. **Disabled**

If you select this option, the home allotment value is **not** automatically set to 0 during the offsigning month.

f. **H/A - Start+End Month**

Allows you to automatically set the home allotment value to 0 when a seafarer is signing on and off during the same month. This setting prevents overpayments to the seafarer.

i. **Default**

This value is selected by default. It is the setting that you defined under **Settings > Payrolls > Payroll Settings > Custom Settings > Allotment Options**.

ii. **Enabled**

If you select this option, the home allotment value is automatically set to 0 when a seafarer is signing on and off during the same month.

iii. **Disabled**

If you select this option, the home allotment is **not** automatically set to 0 when a seafarer is signing on and off during the same month.

8. Choose **Save** to save your changes.

For the payroll settings to take effect, the corresponding wage scale must be confirmed, first.

### 1.2.5. Add Wage Scales - Ranks

1. Go to **Settings > Wage Scales**.
2. From the **Wage Scales** list on the left, select an entry and choose **Add** from the data table on the right.



#### NOTE

If not confirmed already, you can also edit existing rank wage scales. Select a rank wage scale from the table and choose **Edit**.

3. On the **During Assignment** tab in the dialog window, enter the following data:
 

In this section, you define the wage that is paid out during the entire assignment, if a paycode matrix was defined and not replaced with other wages, such as split wages.

  - a. **Rank**

Select the relevant rank from the drop-down list.

The colored circles next to the rank indicate the status of the rank. Green means the rank is active. Red means that the rank is inactive.
  - b. **Payroll Group**

Select a payroll group from the drop-down list or create a new group by entering it directly into the field. This field only has an impact on the payroll API.

c. **Working Hours (Weekly)**

Specify the number of working hours each week.

d. **Leave Pay Days (Per Month)**

By default, the value in this field is derived from the settings made in the wage scale group.

You can overwrite the value here.

e. **Per Day**

If you select this checkbox, the paid leave days are calculated for each day within a defined person history period.

f. **Filter**

You can filter the existing earning or deduction positions of this wage scale.

g. **Earnings**



**TIP**

If you're expecting a certain type of earning or deduction in the areas below, double-check whether you've selected them in the paycode matrix.

The earnings that were selected in the paycode matrix are listed in this area.

You can edit the value of each type of earning.

If you define a monthly or monthly absolute position, the value entered is used as a prorated amount:  $[\text{Value} / 30 \times \text{Number of Days}]$ .

If you define a manual entry, the position and the defined unit is displayed. The position is then multiplied with a manually entered value in the payroll.

### Example 1. Overtime Hours

The earning for overtime hours is specified as 6,36 EUR in the wage scale.

In the payroll 10 additional earnings for overtime hours are added:

$$10 \times 6,36 \text{ EUR} = 63,60 \text{ EUR}$$

h. **Deductions**

The deductions that were selected in the pay code matrix are listed in this area.

You can edit the value of each type of deduction.

If you define a manual entry, the position and the defined unit is displayed. The position is then multiplied with a manually entered value in the payroll.

4. On the **Company Bonus** tab in the dialog window, enter the following data:

**NOTE**

The **Company Bonus** tab is only displayed if you've made the respective setting.

The name of the **Company Bonus** tab is derived from your settings made under **Settings > Payrolls > Payroll Settings > Global Settings**.

For every year a seafarer has spent with the company, you can define a bonus.

It is not possible to define a different company bonus for split wages, the settings made for the respective wage scale are applied.

The value you enter for **Year 2**, for example, is copied to all subsequent years. The value entered for **Year 2** applies after 12 months. You can, however, overwrite the values.

5. Choose the + icon on the left side of the dialog window to add a split wage.

Specify the following data for the new split wage:

- a. **Split Wage Type**

**NOTE**

You can only define split wages, if you've made the corresponding settings under **Settings > Payrolls > Custom Settings > Wage Options**. For more information, see [Define Custom Payroll Settings \[6\]](#).

Select a value from the drop-down list:

- i. **Split Wage**

If you choose this wage type, you need to specify after how many months (assignment time or calendar year depending on your settings) the split wage should be applied.

- ii. **Newly Promoted**

If you choose this wage type, the newly promoted wage is available for selection in the assignment.

- b. **Starts after (Months)**

Enter the number of months after which the new split wage should be applied.

**NOTE**

This field is only relevant if you choose the wage type **Split Wage**.

- c. Choose **Add Split Wage** to create a new split wage for the selected wage scale. You can add as many split wages as you like.

- d. Then continue with the actions described in step 3 and 4.

The values are copied from the **Assignment Start** wage when you create a split wage. You can then adapt the values accordingly. This does **not** affect the company bonus, which is independent of the split wages.

**NOTE**

You can delete a split wage as long as it hasn't been confirmed, yet.

Simply hover over the entry and choose the × icon to delete the split wage.

6. Choose **Save** to save your changes.
7. For the new wage scale to take effect on its **Effective as of** month, it needs to be confirmed. Once it's confirmed, it can no longer be edited.  
Depending on the rights assigned to your user, you can confirm the wage scale yourself.
  - a. After saving the wage scale, select it from the data table and choose **Edit** to open the wage scale details.  
In the dialog window, you then choose **Save and Confirm** to confirm the respective wage scale.
  - b. To directly save and confirm your changes in one go, choose **Save and Confirm** in the wage scale dialog window.

### 1.2.6. Delete Wage Scales - Ranks

You can delete wage scales as long as they haven't been confirmed, yet.

1. Go to **Settings > Wage Scales**.
2. Select a wage scale group from the **Wage Scales** list on the left.
3. Select a rank wage scale from the data table on the right and choose **Delete**.
4. Confirm the warning message.

### 1.2.7. Copy Wage Scales - Ranks

1. Go to **Settings > Wage Scales**.
2. Select a wage scale group from the **Wage Scales** list on the left.
3. Select a rank wage scale from the data table on the right and choose **Copy**.
4. In the dialog window, select the ranks to which you want to copy the rank wage scale from the drop-down list.  
To filter the list, you can type the name of the rank directly into the selection field.
5. Choose **Save** to save your changes.  
The system then automatically copies the values from the original wage scale to the new wage scales and adds them to the data table.  
You can then adapt the values to your needs.  
For more information, see [Add Wage Scales - Ranks \[37\]](#).



## 1.3. Payment Banks

On the **Payment Banks** subtab, you can add bank accounts based on which payment files are generated.

You use the bank accounts during the creation of home allotment (splitting) under **Payroll > Home Allotments**, for example. There you can assign the relevant payment bank to the newly created home allotment.



### NOTE

If you enter 0 as an allotment, the home allotment (splitting) is not considered during the export of payment files under **Bank Payments > Export**.

The subtab consists of the following areas:

- **Accounts**  
Shows the list of bank accounts for the payment banks you created.
- **Vessel Selection**  
Shows all vessels that you can select and thus assign to a bank account.
- **Payment Files**  
Shows all payment files for a combination of bank account and vessels that have been exported. This list acts as a changelog.

### 1.3.1. Add Bank Accounts

1. Go to **Settings > Payment Banks**.

2. In the **Accounts** list on the left, choose **Add**.

**TIP**

To filter the list, you can enter the name of the account in the **Filter Accounts** search bar, select an entry from the **Filter by Vessel** drop-down list, or search for active accounts, only, by selecting **Active Accounts** from the **Filter by Status** drop-down list.

**NOTE**

To edit or delete an existing bank account, select an entry from the list and choose **Edit** or **Delete**.

3. In the dialog window, enter the following data:
  - a. **Bank Name**  
Enter the name of the bank where the bank account is located.
  - b. **Bank Code**  
Enter the BIC of the relevant bank account.
  - c. **SWIFT**  
Enter the SWIFT code of the relevant bank account.
  - d. **Beneficiary**  
Enter the name of the beneficiary.
  - e. **Bank Country** (optional)  
Select the country in which the bank is located from the drop-down list.
  - f. **Currency** (optional)  
Select the relevant currency for your bank account from the list.
  - g. **IBAN**  
Enter the IBAN number of your bank account.
  - h. **Number**  
Enter the bank account number of your bank account.

**NOTE**

It is required to specify either the IBAN or the bank account number. Once you've entered a value for one of the fields, the other field is no longer mandatory.

- i. **Is Primary**  
Select this checkbox, if you want to mark this bank account as your main bank account for the selected currency.  
The bank account is then marked as **Default** in the **Accounts** list on the left.

This bank account is then automatically assigned to any vessels as their main bank account. Once the checkbox is selected, you **cannot** deselect certain vessels manually.

To assign the bank account to specific vessels, only, you must deselect the **Is Primary** checkbox or create a new bank account without selecting this checkbox.



**NOTE**

If you create a new bank account for the same currency and mark it as the primary bank account, the **Is Primary** flag is automatically removed from the former primary bank account.

j. **Via Bank**

Select this checkbox, if you want the payment to be made to a specific bank first and then to the respective seafarer.



**NOTE**

If required, you can specify a **Via Bank** for a specific seafarer. Via banks are typically used when the original bank account is blacklisted by the USA, for example, but you still want to make sure the seafarer is getting paid. When using the payroll API, the **Via Bank** is delivered in addition to the original bank account. So you can deviate from the standard procedure. For our integrated bank payments feature, via banks are not considered, yet.

k. **Agency** (optional)

Select the relevant agency from the drop-down list.



**NOTE**

If you've selected an agency, the bank account is grouped under **Agency** in the **Accounts** list on the left.

l. **Street**

Enter the street name of the bank.

m. **Street 2** (optional)

Enter any additional information regarding the location of your bank. You can also use this field if the name of the street is too long to fit into the first field.

n. **Postal Code** (optional)

Enter the postal code of the city in which your bank is located.

o. **City**

Enter the name of the city in which the bank is located.

p. **County/Region**

Enter the name of the county or region in which the bank is located.

q. **Country**

Select the country in which the bank is located from the drop-down list.

r. **Remark** (optional)

Enter any additional remarks regarding the bank account into this field.

s. **File Transaction ID**

Enter the transaction ID that is used for processing payment files. This ID might be required by the bank for identification prior to processing the file.

4. Choose **Save** to save your changes.

### 1.3.2. Assign Bank Accounts to Vessels

1. Go to **Settings > Payment Banks**.
2. Select a bank account from the **Accounts** list on the left.
3. Then select the vessels to which you want to assign the bank account from the **Vessel Selection** card.



#### TIP

To filter the list, you can also enter the name of the vessel in the search bar on top of the **Vessel Selection** card.



#### NOTE

If you've selected the **Is Primary** checkbox during the creation of the bank account, all vessels are automatically selected. To be able to manually assign certain vessels to a bank account, deselect the **Is Primary** checkbox by editing the bank account or create a new bank account.

For more information, see [Add Bank Accounts \[41\]](#).

## 1.4. PHL Contributions

On the **PHL Contributions** subtab, you define social security contributions for Philippine seafarers that are automatically deducted from their monthly home allotment. Additionally, you can document reconciliations and configure variable contribution types that you can deduct on top of social security contributions within the seafarer's assignment period.

# CFM Crewing

The screenshot displays the CFM Crewing software interface with a navigation menu at the top. The main content area is divided into four cards:

- Philippine contributions:** A table with columns 'Type', 'Valid from', and 'Imported'. It lists 'SSS contribution' and 'Philhealth contribution' for January 2019, with 'Imported' dates of 11/25/2019. Padlock icons indicate processed entries.
- Reconciliations:** A table with columns 'Contribution type', 'Date paid', 'Agency Payroll Month', and 'Reconciliation number'. It lists 'Pag-IBIG cont...' for February 2020, December 2019, and February 2018.
- Variable contribution types:** A table with a 'Name' column listing 'test', '123', and 'asd', each with a padlock icon.
- Pag-IBIG contribution:** A table with columns 'Valid from' and 'Contribution'. It lists 'May 2020' (345.00) and 'February 2020' (234.00).

It is divided into the following four cards:


- **Philippine Contributions**
- **Pag-IBIG Contribution**
- **Reconciliations**
- **Variable Contribution Types**


## 1.4.1. Import Philippine Contributions

1. Go to **Settings > PHL Contributions**.
2. On the **Philippine Contributions** card, choose **Import**.



### NOTE

To delete an existing contribution, select an entry from the list and choose **Delete**. Entries with the  padlock icon have already been processed and can therefore not be deleted.

3. In the dialog window, enter the following data:
  - a. **Valid From**  
Enter the month from which the contribution is valid.
  - b. **Type**  
Select the type of contribution from the drop-down list.
  - c. **Document**  
Add the relevant document to the contribution by choosing the  icon or by simply dragging and dropping your document into this area.

From this document, the system then imports figures that are used to calculate the social security contributions.



#### NOTE

You may only attach files with the file type .xlsx or the following column sequence for the **Philhealth** and **SSS** contribution types:

1. Column A - Basic From
2. Column B - Basic To
3. Column C - Employer Share
4. Column D - Employee Share
5. Column E - EC

This column is only relevant for the **SSS** contribution type.

4. Choose **Save** to save your changes.

### 1.4.2. Add Pag - IBIG Contributions

Philippine seafarers might be members of the Pag-IBIG fund, which is a government-owned and controlled corporation. Thus, a monthly contribution needs to be set up.

1. Go to **Settings > PHL Contributions**.
2. On the **Pag - IBIG Contributions** card, choose **Add**.



#### NOTE

To delete an existing contribution, select an entry from the list and choose **Delete**.

Contributions that are already in use can no longer be deleted.

3. In the dialog window, enter the following data:
  - a. **Valid From**  
Enter the month from which the contribution is valid.
  - b. **Contribution**  
Enter the contribution amount that you want to contribute.  
The amount is paid in equal parts by the employer and the seafarer.
4. Choose **Save** to save your changes.

### 1.4.3. Add Reconciliations

A reconciliation is a confirmation for the contribution that was paid for the respective seafarer.

You can document the processed contributions on this card. This information is also used in case a seafarer requires a confirmation of deducted contributions for his own documentation.

1. Go to **Settings > PHL Contributions**.
2. On the **Reconciliations** card, choose **Add**.



#### NOTE

To edit or delete an existing reconciliation, select an entry from the list and choose **Edit** or **Delete**.

3. In the dialog window, enter the following data:
  - a. **Contribution Type**  
Select the type of contribution from the drop-down list.
  - b. **Date Paid**  
Enter the date on which the contribution was paid to the government.
  - c. **PHL Contribution Month**  
Enter the month for which the applicable contribution was paid.
  - d. **Reconciliation Number**  
Enter the relevant reconciliation number.
  - e. **Document**  
Add the relevant document to the reconciliation by choosing the **+** icon or by simply dragging and dropping your document into this area.
4. Choose **Save** to save your changes.

### 1.4.4. Add Variable Contribution Types

1. Go to **Settings > PHL Contributions**.
2. On the **Variable Contribution Types** tab, choose **Add**.  
Independent of the legally required contributions, you can add additional contribution types that might be specific to your company.



#### NOTE

To edit an existing variable contribution type, select an entry from the list and choose **Edit**.

Contribution types that are already in use can no longer be deleted.

3. In the dialog window, enter a name for the new contribution type.
4. Choose **Save** to save your changes.

## 2. Assignments

On the **Assignments** subtab, you can manage data that is specific to the seafarer's assignments, past sea services, and the personal history of the selected seafarer, for example.

The screenshot displays the 'Assignments' subtab in the CFM Crewing software. The interface is divided into three main sections: Assignments, Past Sea Services, and Personal History.

**Assignments Section:**

- Current assignment: 28. SECOND OFFICER, Hamburg (Germany), 02/10/2020. Vessel: TBA (Unknown), 12/27/2020.
- Next assignment: No future assignments.
- Filter assignments: [Filter] Show leave periods: [Show/Hide]
- Table of assignments:
 

Rank	Vessel	Start	End	Duration
SECOND OFFICER	28. [Vessel]	02/10/2020	12/27/2020	10m, 22d
SECOND OFFICER	12. HS [Vessel]	06/24/2019	10/24/2019	4m, 3d
SECOND OFFICER	20. HS [Vessel]	08/20/2018	02/22/2019	6m, 7d
THIRD OFFICER	14. HS [Vessel]	09/17/2017	01/29/2018	4m, 15d
THIRD OFFICER	12. HS [Vessel]	08/07/2017	09/16/2017	1m, 11d
THIRD OFFICER	12. HS [Vessel]	01/14/2017	05/17/2017	4m, 4d
THIRD OFFICER	15. HS [Vessel]	09/12/2015	11/30/2015	2m, 20d
THIRD OFFICER	15. HS [Vessel]	08/10/2014	05/31/2015	9m, 25d

**Past Sea Services Section:**

- THIRD OFFICER, 08/10/2014 - 12/10/2014.
- Table with columns: ORT, Engine, Flagstate, Vessel IMO.

**Personal History Section:**

- Table with columns: Title, Start, End, Duration.
- Entries include: Sign off travel days (28. HS [Vessel]), On board (28. HS [Vessel]), Leave Days, Sign off travel days (12. HS [Vessel]), On board (12. HS [Vessel]), Sign on travel days (12. HS [Vessel]), Leave Days, Sign off travel days (20. HS [Vessel]), On board (20. HS [Vessel]), Sign on travel days (20. HS [Vessel]), Leave Days, Sign off travel days (14. HS [Vessel]), On board (14. HS [Vessel]), On board (12. HS [Vessel]), Leave Days, Sign off travel days (12. HS [Vessel]), On board (12. HS [Vessel]), Leave Days, On board (15. HS [Vessel]), Sign on travel days (15. HS [Vessel]), Leave Days, Sign off travel days (15. HS [Vessel]), On board (15. HS [Vessel]).

The subtab is divided into the following categories which in turn consist of different cards:

- **Assignments**

In this category, you get an overview of the assignments of the selected seafarer.

This category is subdivided into the following cards:

- **Assignments**

This card shows the current and future assignments of the seafarer as well as his complete assignment history. Further it is possible to maintain your past sea services records.

You can add, edit, or delete assignments from this card.

Additionally, you can choose to show or hide leave periods in the **Duration** column of the assignments list. Simply choose **Show/Hide Leave Periods** above the table.

By double-clicking on any of the assignments from the list, the current or future assignment on top of the card, you navigate into the details of the specific assignment. This screen is again divided into the following cards:

- **Contract**

On the **Contracts** card, you get general information on the seafarer's contract, such as his rank, his agency applicable as of the assignment start, and the vessel on which the



assignment takes place. From this card, you can edit the contract, create a letter of guarantee (LOG) or create a contract, if needed.

- **Wages**

On the **Wages** card, you get an overview of the seafarer's wages for the selected assignment. For a voyage employee, you can edit the wages or change the wage scale as long as they're not confirmed, yet.



### NOTE

If the seafarer has a permanent contract, the wages are automatically taken from the contract and you **cannot** edit the wages on this card.

The number of dates displayed on top of the card shows that split wages or wage scale versions exist.

Additionally, you can define a home allotment by choosing the → arrow icon.



### NOTE

The option to add a home allotment is only visible if you have maintained a bank account for the selected seafarer.

- **Payroll Settings**

On the **Payroll Settings** card, you get an overview of the payroll settings that are valid for the seafarer during the current assignment. You can add, edit, delete, or show the payroll settings of the seafarer depending on the rights that are assigned to your user. If no payroll settings are defined on this level, the settings in the following order are applied, if available:

- Payroll settings of the seafarer
- Payroll settings of the assigned wage scale
- Payroll settings of the seafarer's nationality
- Payroll settings of the seafarer's agency
- Global payroll settings

- **Contributions**

On the **Contributions** card, you get an overview of the contributions that were defined for a Filipino seafarer. These contributions are subtracted from his home allotment together with the PHL contributions.

You can add, edit, or delete contributions.

- **Documents**

On the **Documents** card, you see the list of documents that are necessary for the current assignment. You can add additional documents, download the documents, send an email with the document attached or add them to the outbox.

**NOTE**

You define the required documents under [Settings > Documents](#).

For more information, see [Documents](#).

- **Briefing/Debriefing**

On the **Briefing/Debriefing** card, you get detailed information on the seafarer's briefing and debriefing. You can also edit the existing information.

- **Sign-on Ticket**

On the **Sign-on Ticket** card, you get information on the sign-on flight of the seafarer. You can also edit or cancel the sign-on flight.

- **Sign-off Ticket**

On the **Sign-off Ticket** card, you get information on the sign-off flight of the seafarer. You can also edit or cancel the sign-off flight.

- **Experience**

On the **Experience** card, you get an overview of the experiences that were created on board the vessel by the seafarer using CSM.

In general, the captain on board the vessel approves or rejects these experiences. The office can, however, also add, edit or delete experiences and approve or reject experiences that were created using CSM.

It is even possible to reopen an experience that has already been approved and edit it.

- **Past Sea Services**

Lists all past sea services of the selected seafarer done for a different employer.

You can add, edit, or delete past sea services from this card.

**NOTE**

Past sea services are relevant to calculate the overall experience of a seafarer. They can also be taken into account when calculating bonuses.

- **Personal History**

Lists the personal history of the selected seafarer. When you plan assignments or add sickness periods for a seafarer, this data is automatically transferred to his personal history.

In the **Personal History** table, you see all events for the selected seafarer and can manually correct the ones which are not allowed.

Events are marked with a color code:

- **Green**

Represents the current ongoing period.

- **Orange**

One or more events are overlapping, but they don't interfere with each other and are therefore allowed.

- **Red**

One or more events are overlapping and they interfere with each other, which is not allowed.

One or more events are overlapping and they interfere with each other, which is not allowed.

You can also add, edit, or delete entries of the personal history from this card manually, as well.



#### **NOTE**

Entries in the personal history of a seafarer are taken into account when calculating the payroll of a seafarer. The system checks for suitable wage scales.

Depending on the seafarer's contract, certain personal history entries are ignored when calculating the payroll, such as **Leave Days** for voyage employees.

If you specify values manually, ensure that these values don't overlap with automatically generated entries in the future. This is why the **Overlapping Person History Records** card is available on the dashboard.

- **Statistics**

In this category, you get an overview of the seafarers' activity for a selected year.

A bar chart displays for every month where the selected seafarer was. Every type of activity is displayed in a different color.

By default, the statistics for the current year are displayed. To view a different year, select a value from the drop-down list by choosing the **arrow** icon.

- **Contracts**

In this category, you get an overview of the contract status of the selected seafarer.

It is subdivided into the following cards:

- **Permanent Contracts**

Lists the permanent contracts of the selected seafarer.

You can add, edit, or delete permanent contracts from this card. You can also add payroll settings to a permanent contract directly from the dialog window while editing the permanent contract.

- **Employment Days**

Displays the hiring date of the seafarer and allows you to overwrite the calculated start date for the company bonus.

- **Payroll Settings**

Lists the payroll settings relevant for this seafarer.

You can add, edit, delete, or view payroll settings from this card depending on the rights that have been assigned to your user.

The settings defined here are disregarding all deviating settings made on global, agency, or nationality level and are only overridden by wage scale-specific or assignment-specific payroll settings.

- **Rank Bonus**  
Allows you to overwrite the calculated start date for the determination of split wages for a specific rank of the seafarer starting from a specific month.  
You can add, edit, or delete rank bonuses.
- **Leave Balance**  
Lists the leave balances of the selected seafarer.  
You can add, edit, or delete the leave balance.

## 2.1. Edit Assignments

1. Go to **Seafarers > Assignments**.
2. In the **Assignments** category on the **Assignments** card, select an entry from the list and choose **Edit**.
3. The system navigates to a detail screen that provides information on the following assignment-specific data:
  - a. **Contract**  
On this card, you can edit all contractual data related to the selected assignment. Simply choose **Edit** in the upper right corner.
  - b. **Wages**  
On this card, you can edit the wage of the seafarer for the selected assignment. Simply choose **Edit** in the upper right corner.
  - c. **Payroll Settings**  
On this card, you can edit the payroll settings of the seafarer for the selected assignment. Simply choose **Edit** in the upper right corner.



### NOTE

The payroll settings defined here are specific to the assignment of the selected seafarer and independent of the global payroll settings you defined under **Settings > Payrolls**.

You cannot make nationality or agency-specific settings on this level, as this is already implied by the specific assignment.

For more information, see [Add Payroll Settings \[27\]](#).

- d. **Documents**  
On this card, you can edit the documents required for the selected seafarer. Simply select a document and choose **Edit** in the upper right corner.
- e. **Briefing / Debriefing**  
On this card, you can edit the entries made for briefings or debriefings. Simply select an entry and choose **Edit** in the upper right corner.
- f. **Sign-on Ticket**  
On this card, you can add the seafarer's sign-on ticket for the flight to the embarkation port. Simply choose **Add** in the upper right corner.

By default, the ticket details include the departure and arrival airports. It is, however, possible to activate a setting requiring details on every flight segment. To do this, contact the support team.

g. **Sign-off Ticket**

On this card, you can add the seafarer's sign-off ticket for his flight back home. Simply choose **Add** in the upper right corner.

h. **Experience**

On this card, you can manage the seafarer's experience by adding or editing new entries to the list. Once added, they need to be approved.



**NOTE**

Experiences are generally added on board the vessel using CSM, but can also be managed using CFM Crewing.

## 2.2. Add Permanent Contracts

1. Go to **Seafarers > Assignments**.
2. In the **Contracts** category on the **Permanent Contracts** card, choose the **+** icon or **Add** to create a new permanent contract.



**NOTE**

You can also edit or delete permanent contracts. Simply select a contract from the card and choose **Edit** or **Delete**.

3. In the dialog window, enter the following information:
  - a. **Contract Start**  
Specify the start date for the permanent contract.
  - b. **Contract End** (optional)  
Specify the end date for the permanent contract.  
If a new permanent contract is created with a start date that is later than the start date of the previous permanent contract, its end date is automatically set to the start date minus 1 day.
  - c. **Rank**  
Select the relevant rank from the drop-down list.
  - d. **Wage Scale**  
Once you've specified a start date and rank, you can select the relevant wage scale from the drop-down list.

**NOTE**

You **cannot** edit the wage scale once you've confirmed it and assigned it to a contract as this would otherwise have an impact on existing payrolls.

The wage scale values from the permanent contract are automatically copied to every assignment.

A seafarer automatically changes from a voyage employee to a permanent employee, if a valid permanent contract was assigned to the seafarer. The seafarer remains a permanent employee as long as the contract is valid or no new assignment as a voyage employee was started, yet.

Wage scales are defined under [Settings > Wage Scales](#).

Once a contract is created, the system automatically identifies the wage scales that are valid during this period. At least the contract start date is displayed.

For more information, see [Add Wage Scales - Ranks \[37\]](#).

e. **Remark** (optional)


Enter any additional remarks regarding the permanent contract in this field.

Once you've specified all mandatory fields, the system automatically calculates the following parameters:

**NOTE**

The values displayed under [Contract Details](#) are always the values of the wage that is valid for the relevant contract.

If the maximum assignment length was 7 weeks at contract start, for example, but it is 8 weeks in a new wage scale version. Then 8 weeks is displayed for **Max. assignment length**, if the start of the version is less or equal to the current date.

- Maximum assignment length
  - Maximum negative leave days
  - Guaranteed home period
  - Currency
4. Choose **Save** to save your changes.
  5. Now, attach all required documents in the [Attachments](#) section by choosing the  icon, **Add** or by simply dragging and dropping it into this area.

Documents required for the contract are automatically generated into the [Attachments](#) section. You can also create the permanent contract based on a template.

- In the **Payroll Settings** section, specify new payroll settings by choosing **Add**.

**NOTE**

The payroll settings defined here are specific to the permanent contract of the selected seafarer and independent of the global payroll settings you defined under **Settings > Payrolls**. They also override payroll settings made for the assigned wage scale.

You cannot make nationality or agency-specific settings on this level, as this is already implied by the permanent contract.

For more information, see [Add Payroll Settings \[27\]](#).

- In the section with the contract start date, you can define the wage of the seafarer. You can also define several split wages. Each split wage has to be confirmed separately, though.
- Choose **Save and Confirm** to activate the new permanent contract.

**NOTE**

Once you've confirmed the new permanent contract, the wage scales that are part of the contract can no longer be changed.

You can, however, unconfirm the contract and thus make it editable again, if the relevant rights are assigned to your user.

Note that also all payrolls linked to the permanent contract are also reopened.

## 2.3. Add Payroll Settings - Seafarers

You can define payroll settings that are specific to an individual seafarer independent of the global payroll settings you defined and override global, agency-specific as well as nationality-specific payroll settings.

The payroll settings defined here are, however, overridden by payroll settings specific to an assignment or permanent contract.

The payroll settings defined here are applied by the system once they differ from the settings made under **Settings > Payrolls**.

- Go to **Seafarers > Assignments**.
- In the **Contracts** category on the **Payroll Settings** card, choose **Add**.

**NOTE**

You can also edit or delete payroll settings as long as they haven't been confirmed. To do so, select an entry from the list and choose **Edit** or **Delete**.

3. In the dialog window, define all relevant settings on each tab.



**NOTE**

The payroll settings defined here are specific to the selected seafarer and independent of the global payroll settings you defined under [Settings > Payrolls](#).

You cannot make nationality or agency-specific settings on this level, as this is already implied by the seafarer himself.

For detailed information on every tab, see [Add Payroll Settings \[27\]](#).

4. Choose **Save** to save your changes.

For the payroll settings to take effect, the corresponding wage scale must be confirmed.