

Setting up Officers and Employees

What are Officers?

The notion of an officer does not really exist for a Sole Trader. For Company's and Limited Liability Partnerships (LLP's), however certain persons connected with the entity must be appointed to hold legal responsibilities. These appointees are known as Officers.

Officers of a Company

Directors and the Company secretary are the officers of a company. For any UK company currently, at least one director must exist. A director must be sign the annual accounts.

Note that a shareholder is not an officer of the company unless also appointed a director or company secretary. Equally a person can be appointed a director or company secretary and therefore an officer who is not a shareholder.

Officers of a LLP

There must be a minimum of two members of the partnership, because there must be at least two Designated Members who carry responsibilities similar to those of a company secretary and an accounts signing Director. These Designated Members are in effect the officers of the LLP.

Officers of a Sole Trader

A sole trader will not have any recognised officers.

Trustee (or Council member) of a Not for Profit Organisation

A charity trustee is a person who has general control and management of the administration of a charity regardless of what they are called. If you are unsure as to whether you may be a charity trustee or not please consult your advisor.

Employees

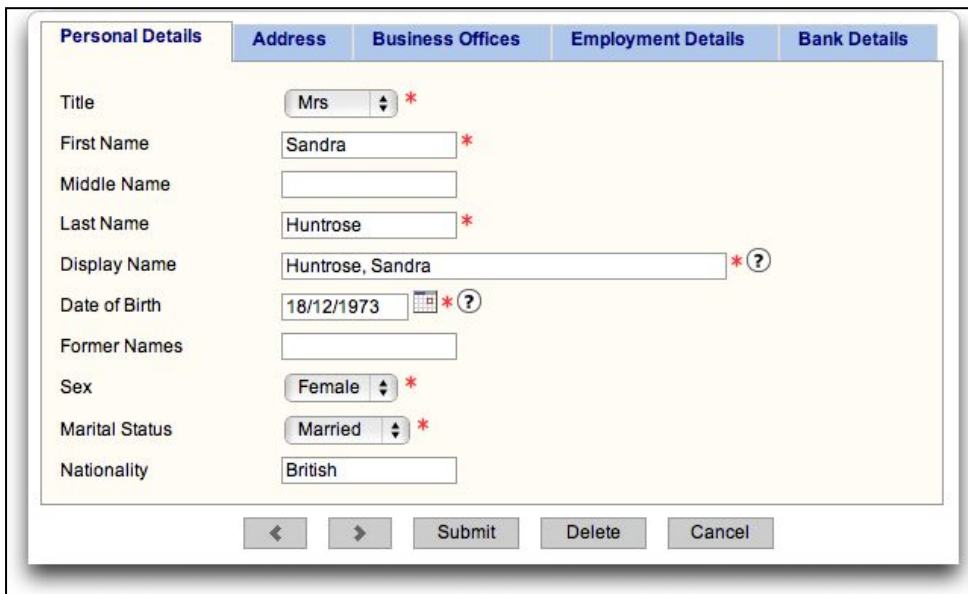
Employees are all those who have an employment contract with the entity. This can include shareholders, directors and company secretary of a company and members of an LLP as well as a Trustee of a Not for Profit Organisation. A sole trader can also have employees.

Setting up an Officer

From the **LISTS** menu, either click **OFFICERS/EMPLOYEES** to show a list of existing and then select **ADD NEW** Or select **ADD OFFICER/EMPLOYEE**.

LISTS → OFFICERS/EMPLOYEES → LIST OFFICERS/EMPLOYEES

A form with several tabs is displayed.



The screenshot shows a web form with five tabs: Personal Details, Address, Business Offices, Employment Details, and Bank Details. The 'Personal Details' tab is active. The form contains the following fields:

- Title: Mrs (dropdown menu, mandatory)
- First Name: Sandra (text input, mandatory)
- Middle Name: (empty text input)
- Last Name: Huntrose (text input, mandatory)
- Display Name: Huntrose, Sandra (text input, mandatory, with a help icon)
- Date of Birth: 18/12/1973 (calendar icon, mandatory, with a help icon)
- Former Names: (empty text input)
- Sex: Female (dropdown menu, mandatory)
- Marital Status: Married (dropdown menu, mandatory)
- Nationality: British (text input)

At the bottom of the form are five buttons: a left arrow, a right arrow, Submit, Delete, and Cancel.

- ◆ In the **PERSONAL DETAILS** tab enter the relevant details, note many are mandatory.
- ◆ Enter the address information in the second tab (not mandatory)
- ◆ In the **BUSINESS OFFICES** tab, select those offices the person will hold and input the required data.
 - In the case of a company the offices are Director or Company Secretary. The tab allows details of dates of appointment and resignation. If the individual is to sign the year-end statutory accounts, check the box.
 - For an LLP the offices are designated member and company secretary. The tab allows details of dates of appointment and resignation. If the individual is to sign the year end statutory accounts, check the box.
 - For a Not for Profit Organisation, Business Offices are known as Organisation Offices, a Trustee. The required information is the same as a business office.
- ◆ In the **EMPLOYMENT** and **TAX DETAILS** tab, enter dates of employment.
- ◆ In the **BANK DETAILS** tab the **Sort Code** and **Bank Account** details can be entered. The information can form the basis of a general extract file that can be used for online banking or creating a BACS file.

Setting up an Employee

Information about employees can be used in a number of places in Liberty Accounts.

- ◆ Payroll
- ◆ P11D Reports
- ◆ Company Vehicles
- ◆ Mileage claims
- ◆ Expense claims

Setting up an employee is the same process as that for an officer (see above) except that information on the **BUSINESS OFFICES** tab is omitted.

- ◆ Finally in the **EMPLOYMENT DETAILS** tab, enter dates of employment.

Once the employee details have been entered in first instance then they can be amended, either from the **LISTS** menu or from the **PAYROLL** menu.

LISTS → **OFFICERS/EMPLOYEES** → **LIST OFFICERS/EMPLOYEES** → **EDIT** relevant employee

OR

PAYROLL → **SET EMPLOYEE** → **SET** relevant employee → **PAYROLL** → **EMPLOYEE DETAILS**