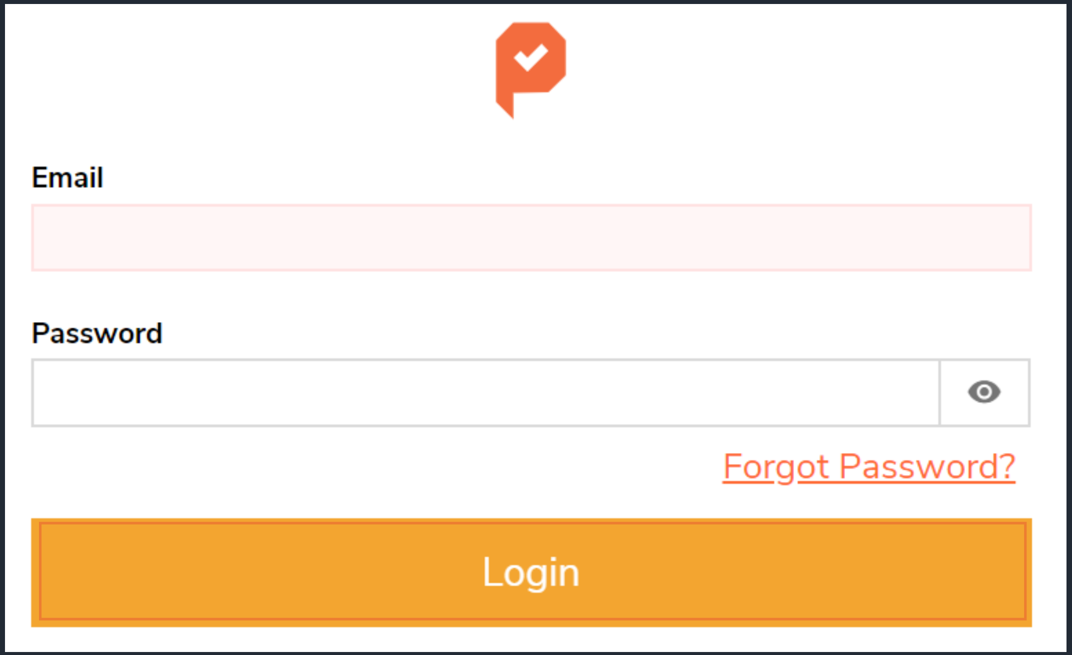
PayCheck

Client Portal User Guide



Welcome to our Client Portal User Guide

We couldn't be happier that you have chosen Pay Check as your payroll provider of choice!

You will find our recently upgraded portal is not only super user friendly; it also provides clarity on the payroll process and how to access your employee's data securely.

If you are reading this, you should have received your welcome email inviting you to set up a password.

Please Note: We suggest using Google Chrome or Microsoft edge, as the portal works best utilizing these browsers. In case a resolution warning pops up, you can address it going into the browser settings and zoom out.

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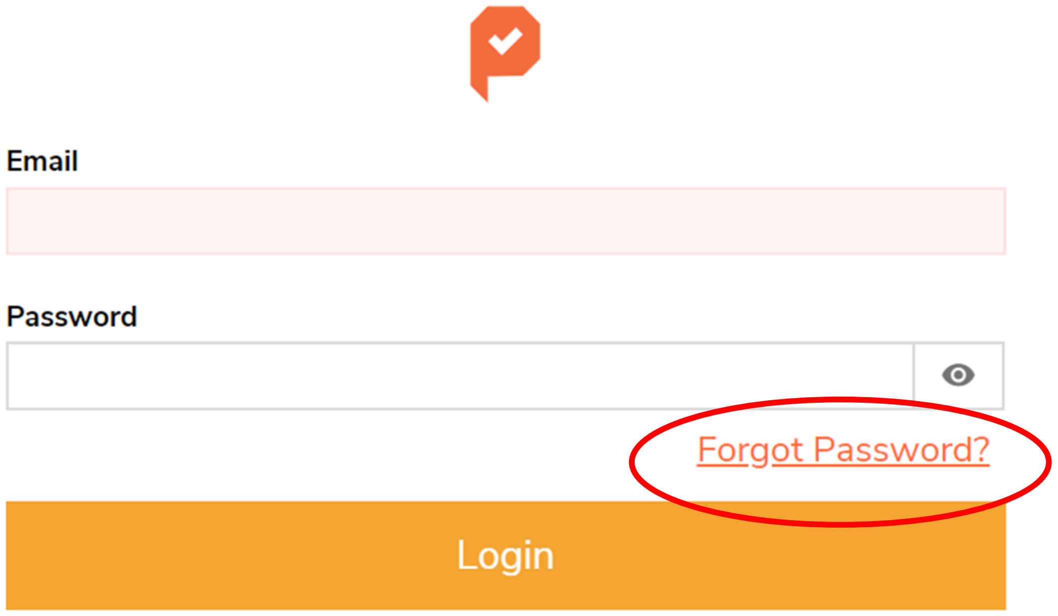
Firstly: Set up your Password



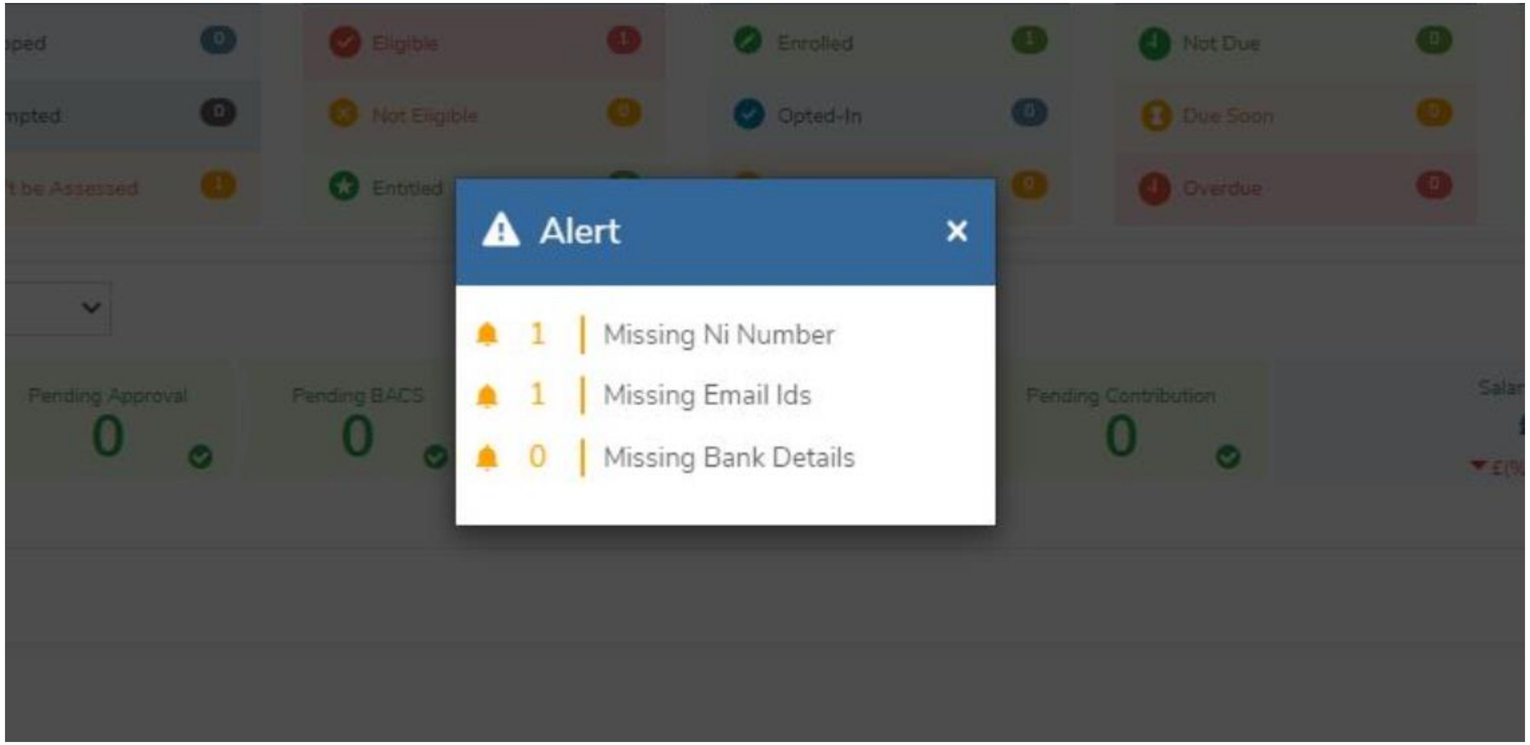
Password format: your password should be a minimum of 8 characters to include at least one uppercase letter, one lowercase letter, one special character (such as ! or ?) and one number.

Alerts

When you first login to the Pay Check Portal you will see your missing personal details alerts - if you have any!

You can close this alert and will still be able to see them at any time in the top right hand corner of your dashboard.

You can click on any number in the ***Alerts*** and this will allow you to see which employees have details missing from these fields.



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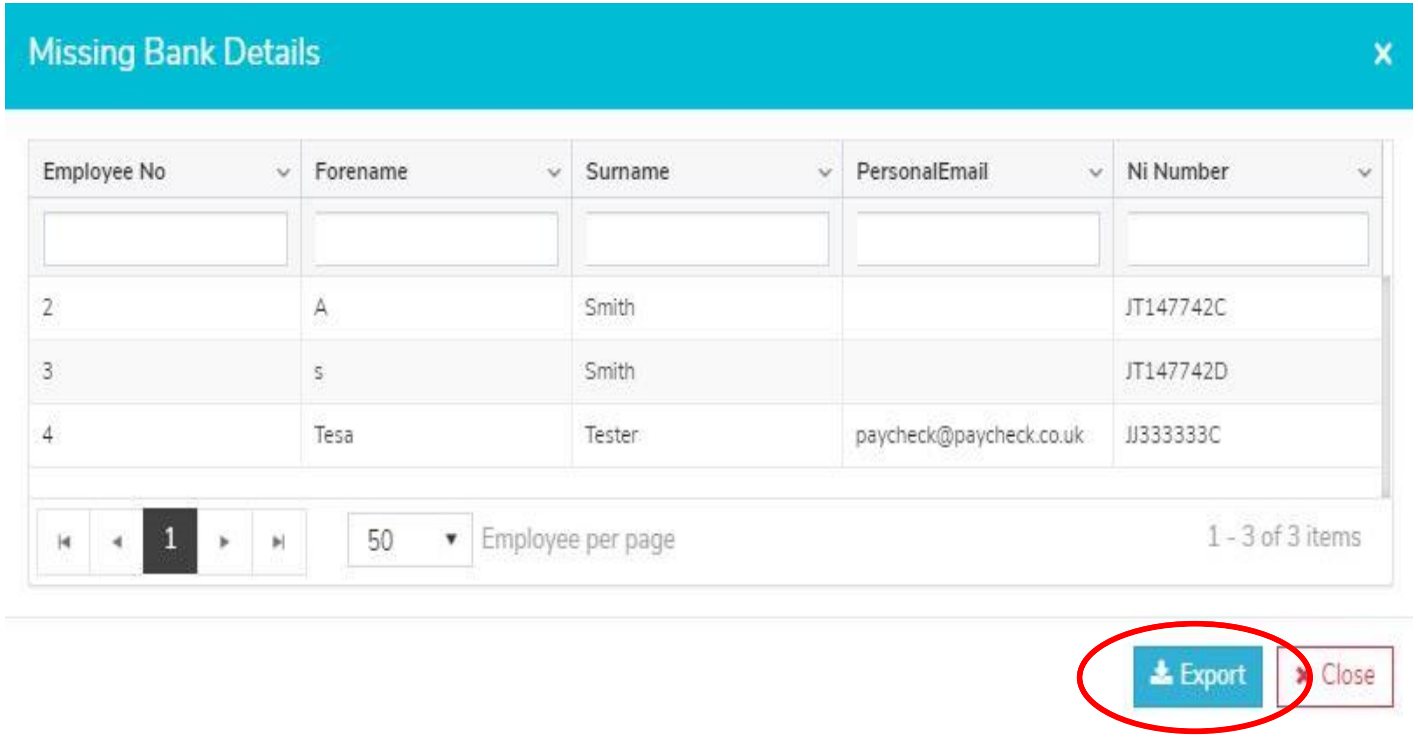
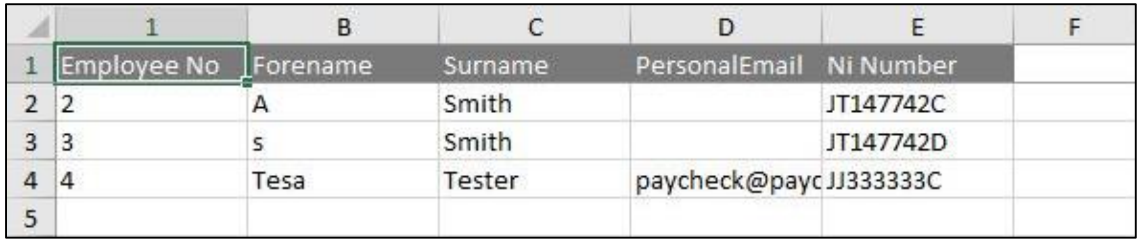
You can even ***Export*** them into a handy csv file for use outside the portal.





	1	B	C	D	E	F
1	Employee No	Forename	Surname	PersonalEmail	Ni Number	
2	2	A	Smith		JT147742C	
3	3	s	Smith		JT147742D	
4	4	Tesa	Tester	paycheck@payc	JJ333333C	
5						

Dashboard

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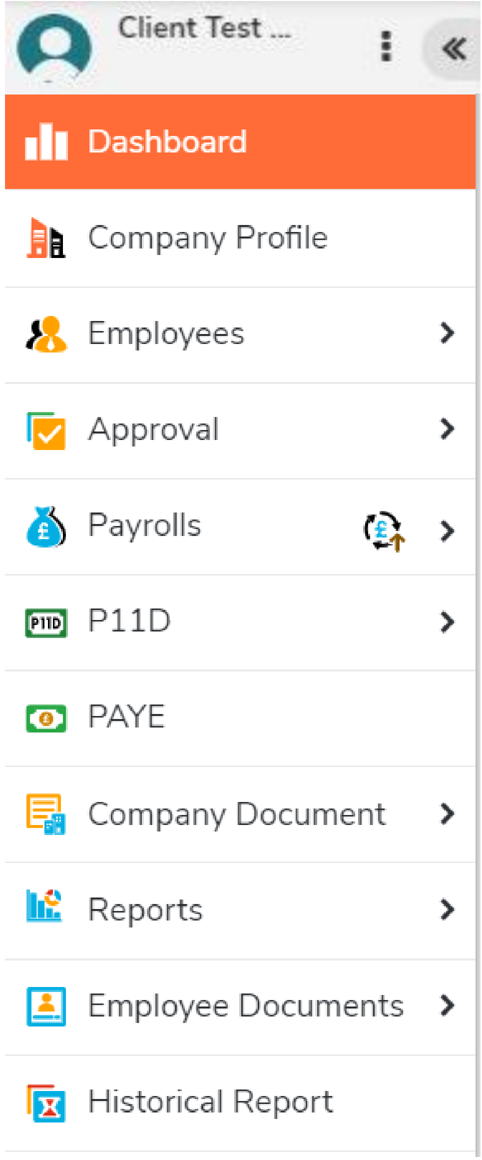
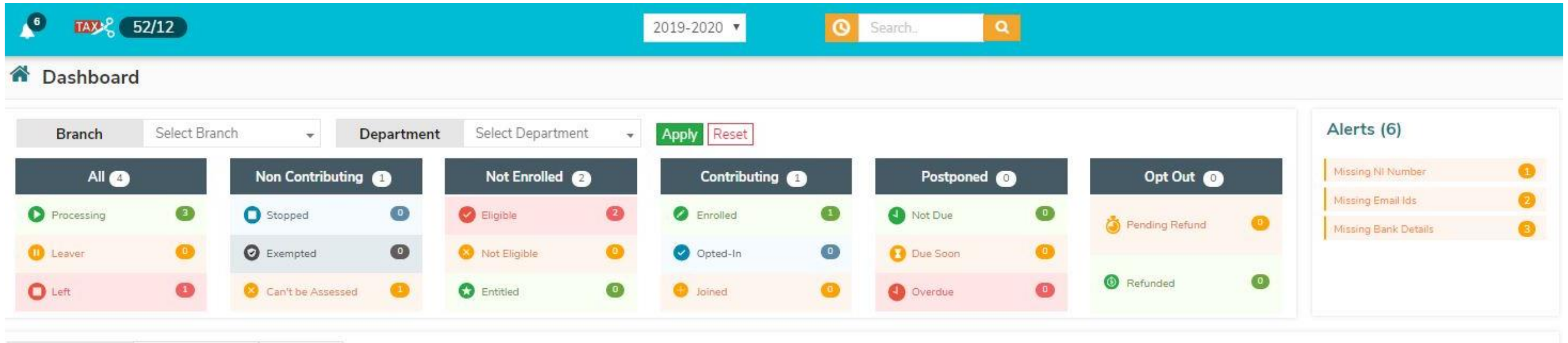
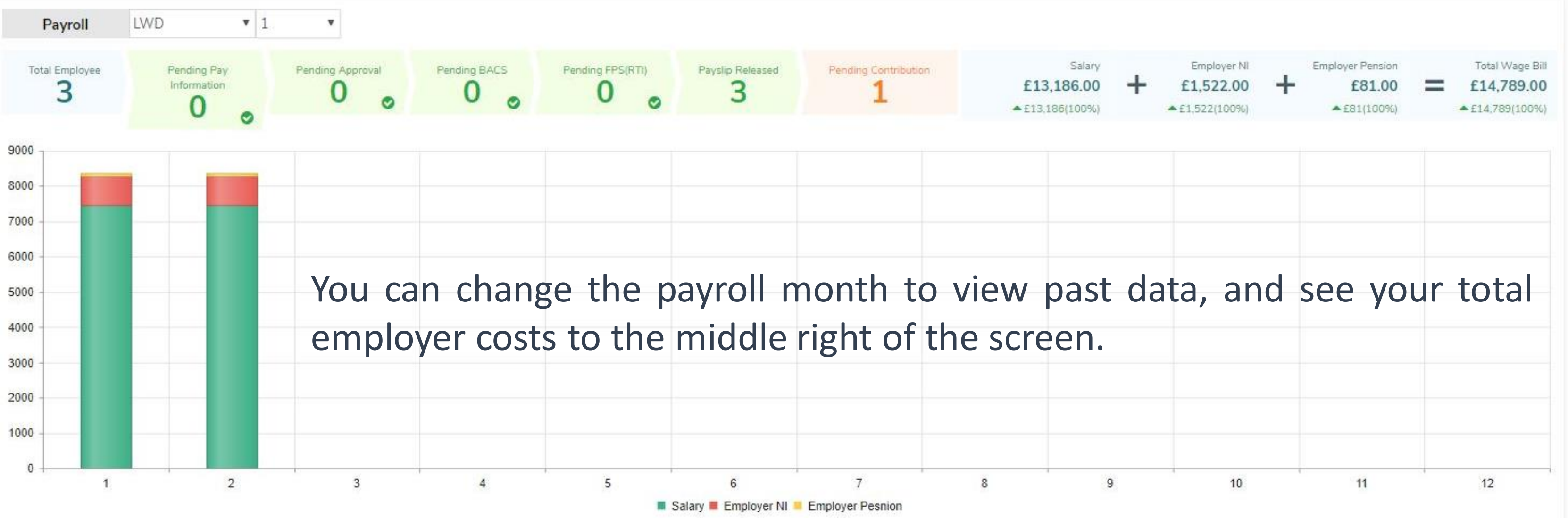


You can view handy information regarding the payroll from your Dashboard, for example, you can view information regarding the pension status of your employees



Just below the pension information, you'll be able to view which stage your payroll has reached regarding processing for the selected Month



You can change the payroll month to view past data, and see your total employer costs to the middle right of the screen.

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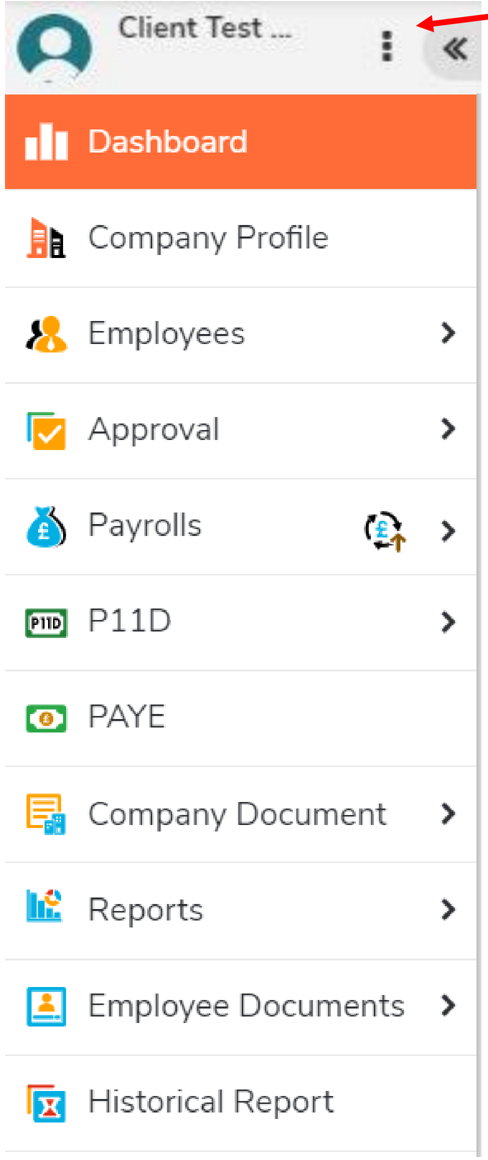
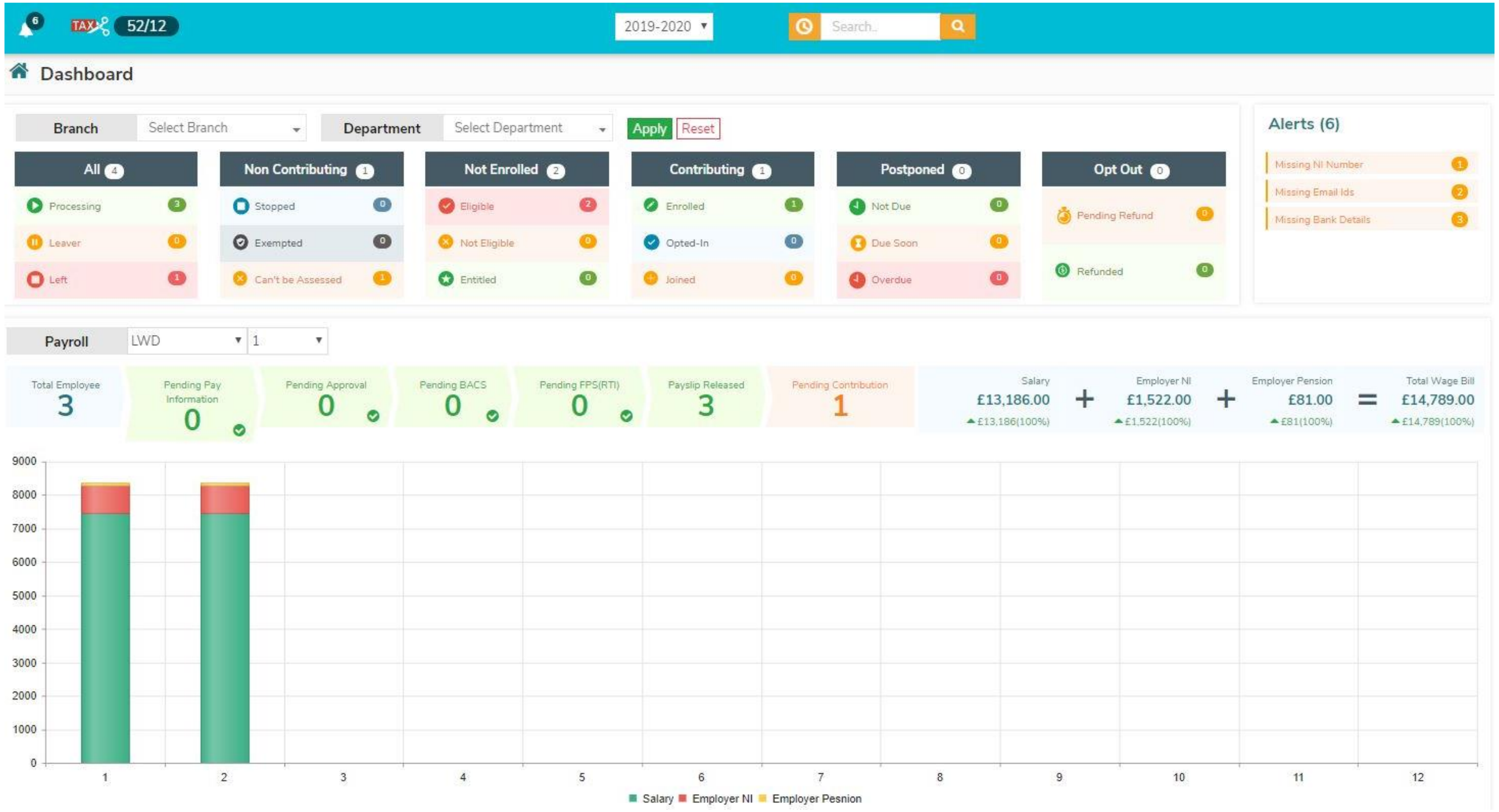
Dashboard

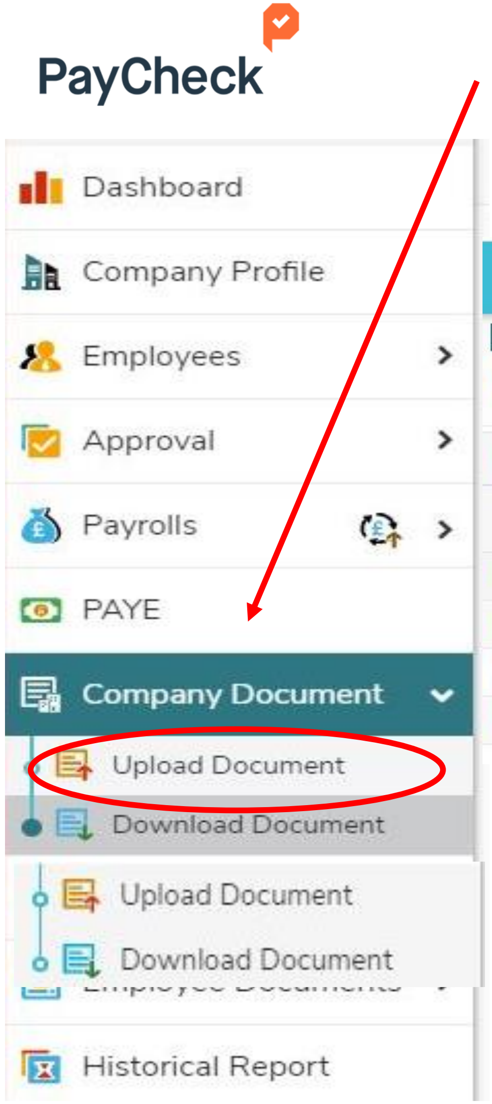
Along the left hand side is your main menu, and by clicking on the 3 dots on the top left next to your name, you can change your password or log out.





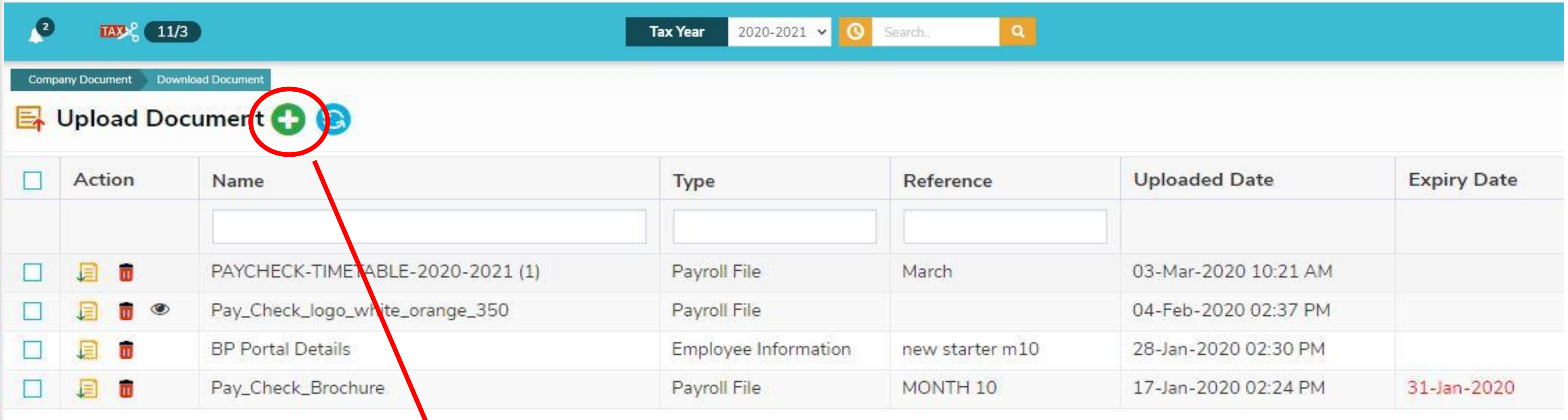
Uploading and Downloading Company Documents

Upload



When you are ready to upload your payroll data, select ***Company Documents->Upload Document***.

You will see a list of your previous uploads



Click on the green Add/Upload Icon to the right of the 'Upload Documents' heading.

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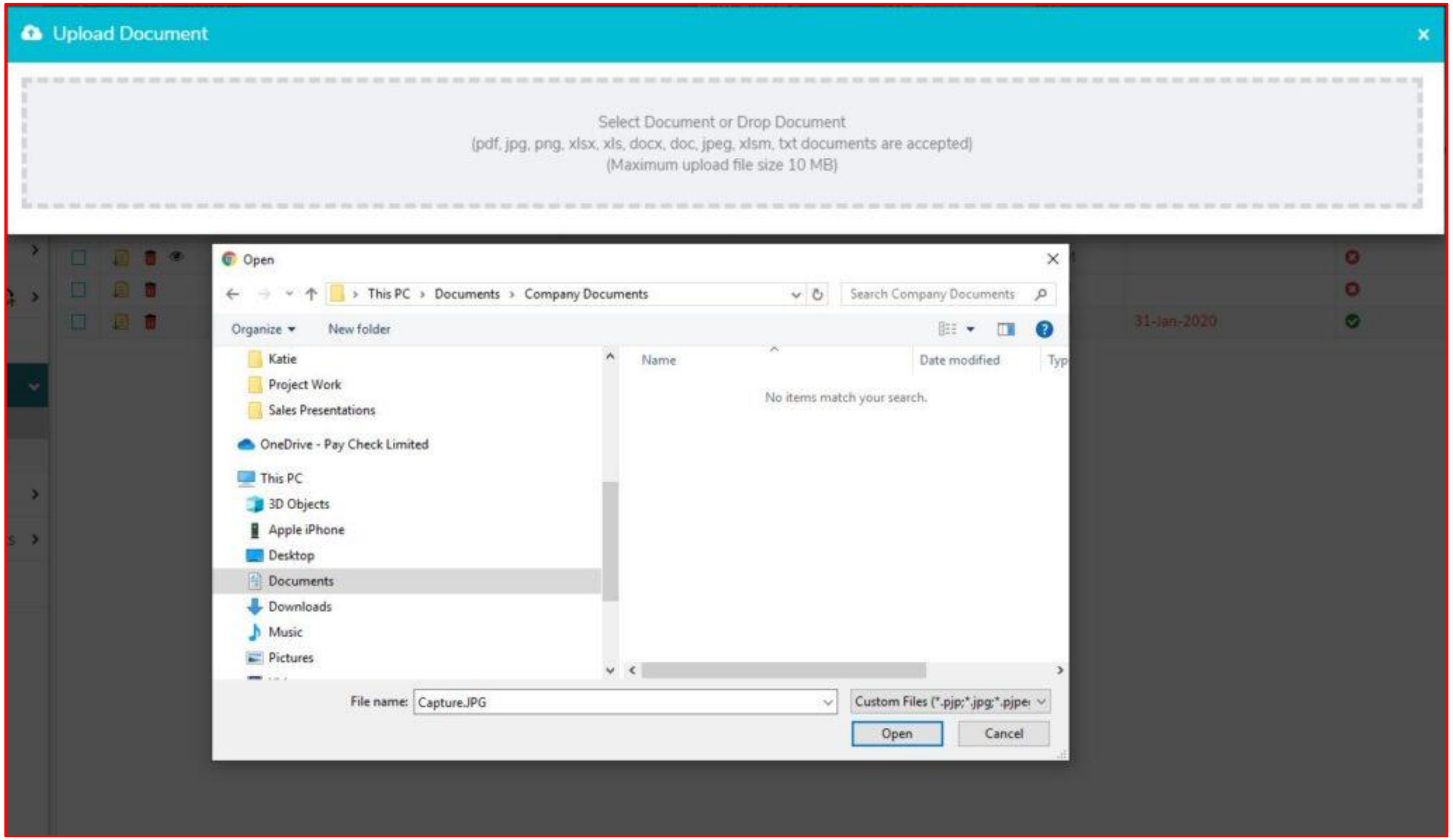
You will see a box that allows you to drag and drop documents, or click to browse and navigate to the folder on your network that contains your payroll data.



This same box tells you the types of files that are compatible to be uploaded.

Choose your document and click Open.

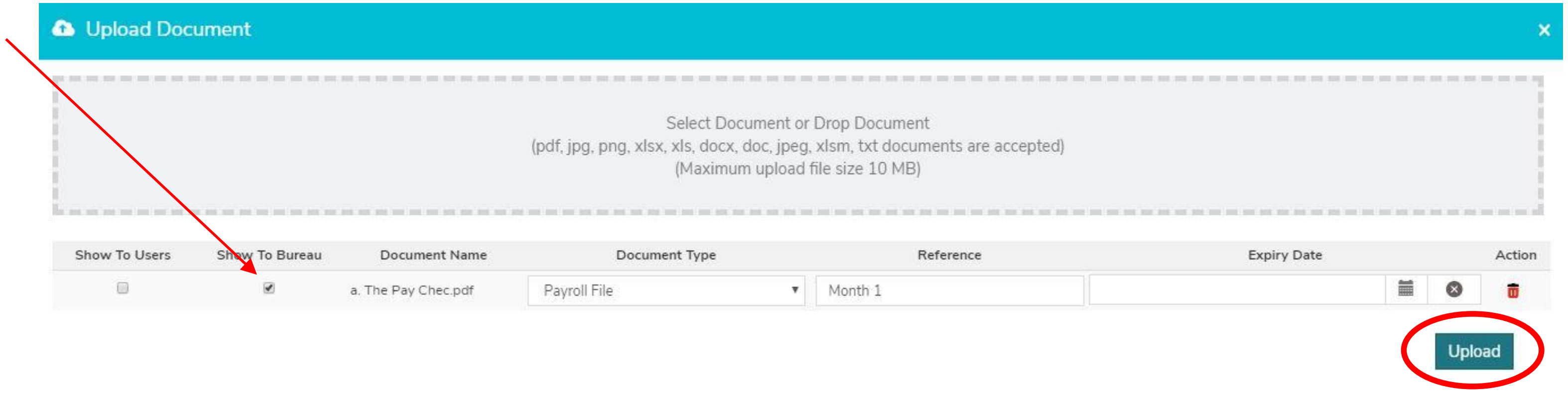
When you click Open you will be taken to an upload Menu

Payroll Data is for Pay Check to process, so ***<u>Show to Bureau</u>*** will be ticked by default. For other Admin Users in your company to be able to view these, tick ***<u>Show to Users</u>***

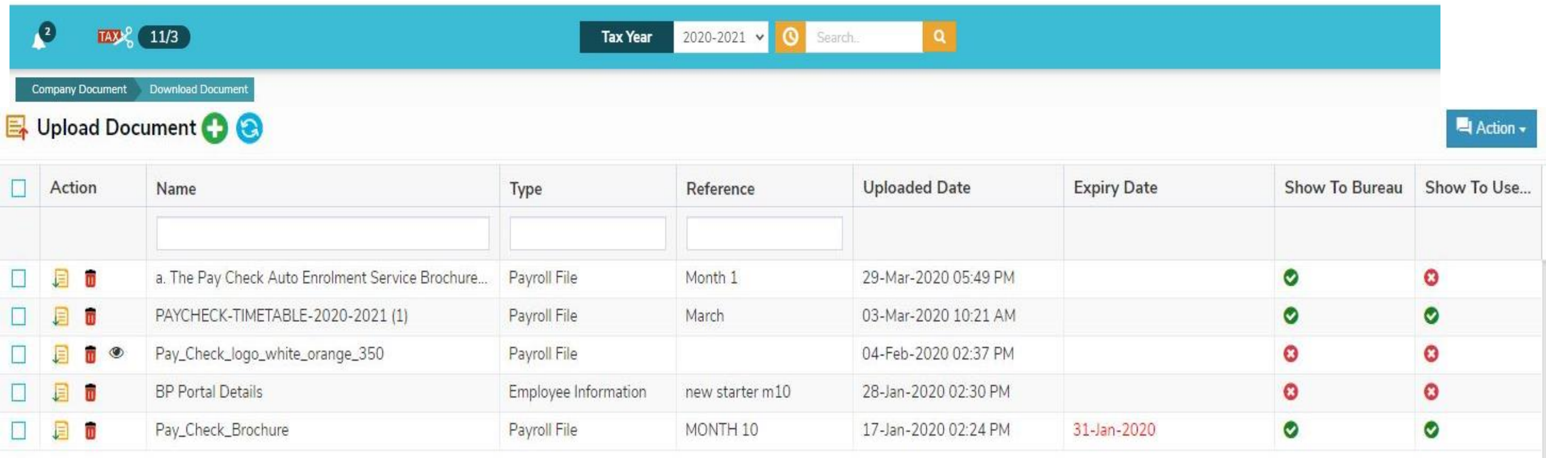
Select the Document Type (usually Payroll File) and then Select the Reference Period (April = Month 1, June = Month 3)

Do not enter an expiry date for your payroll files (this feature could be used for confidential information that you do not want to be accessible after a certain date)

<u>Click Upload</u>



Once uploaded, you will see the document in the ‘Upload Document’ History, with the upload dates for your own audit reference.



	Action	Name	Type	Reference	Uploaded Date	Expiry Date	Show To Bureau	Show To Use...
		a. The Pay Check Auto Enrolment Service Brochure...	Payroll File	Month 1	29-Mar-2020 05:49 PM			
		PAYCHECK-TIMETABLE-2020-2021 (1)	Payroll File	March	03-Mar-2020 10:21 AM			
		Pay_Check_logo_white_orange_350	Payroll File		04-Feb-2020 02:37 PM			
		BP Portal Details	Employee Information	new starter m10	28-Jan-2020 02:30 PM			
		Pay_Check_Brochure	Payroll File	MONTH 10	17-Jan-2020 02:24 PM	31-Jan-2020		

Download

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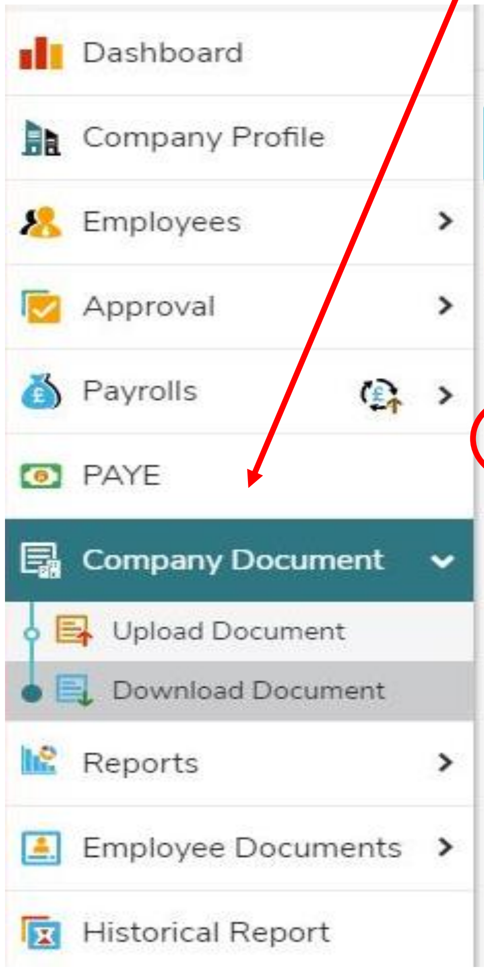
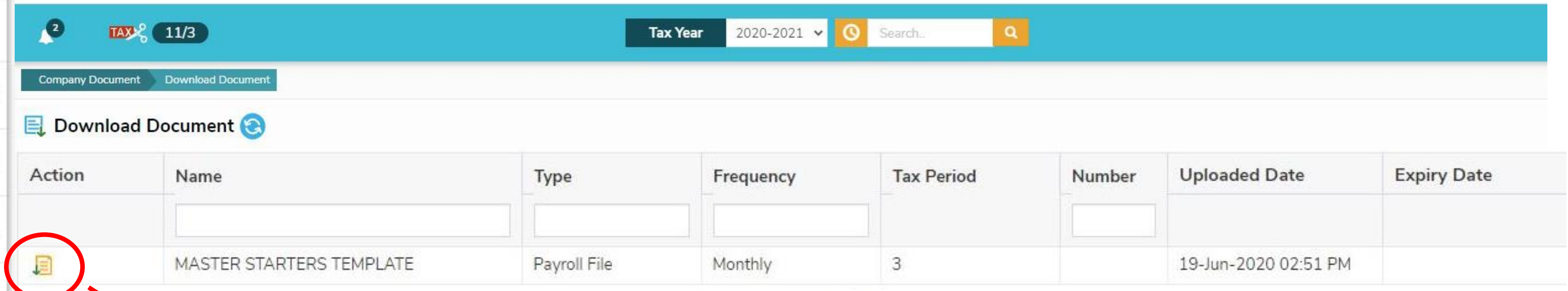
To ***Download your Payroll Template*** or other documents that Pay Check have prepared (including calculations and notes) select: Company Documents -> Download Document.





Click on the orange ***Download icon*** to the left of the document.

Viewing Payroll Reports for Approval

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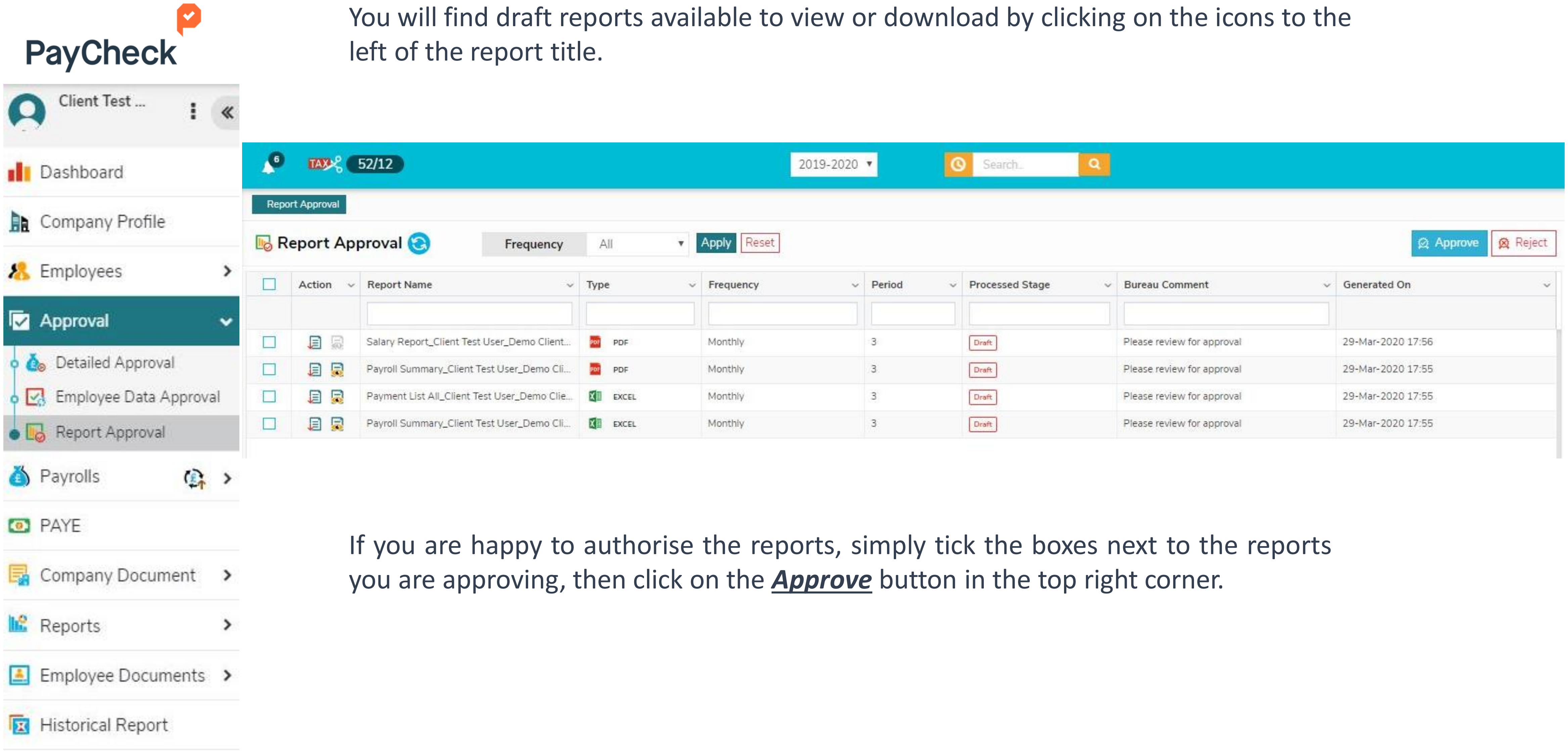
You will receive an email telling you when payroll reports are available for approval. You will find draft reports available to view or download by clicking on the icons to the left of the report title.



If you are happy to authorise the reports, simply tick the boxes next to the reports you are approving, then click on the ***Approve*** button in the top right corner.

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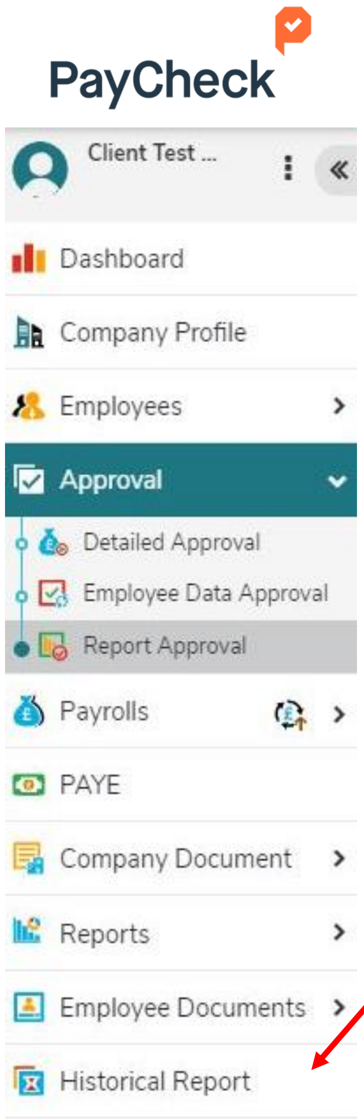
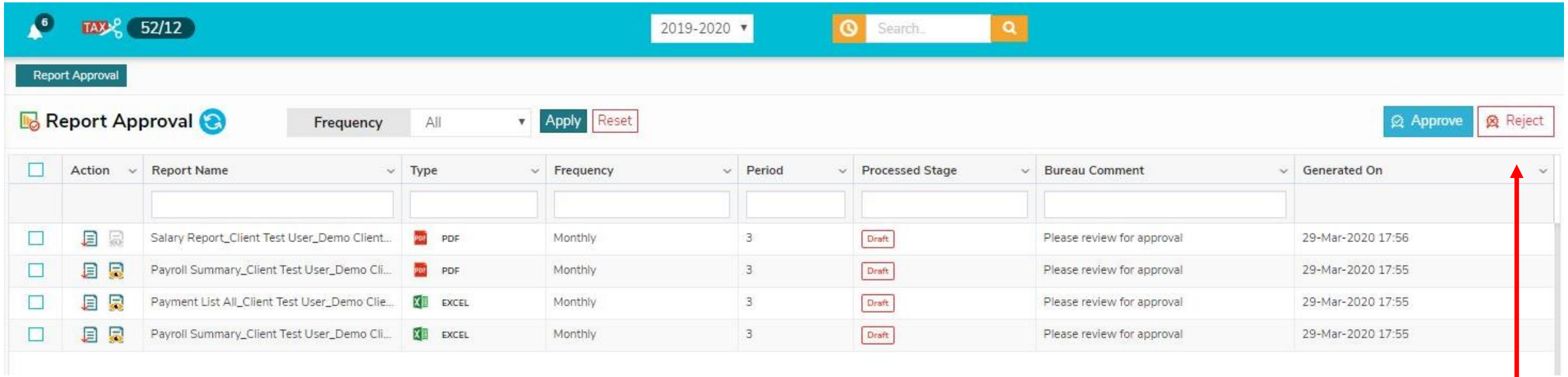




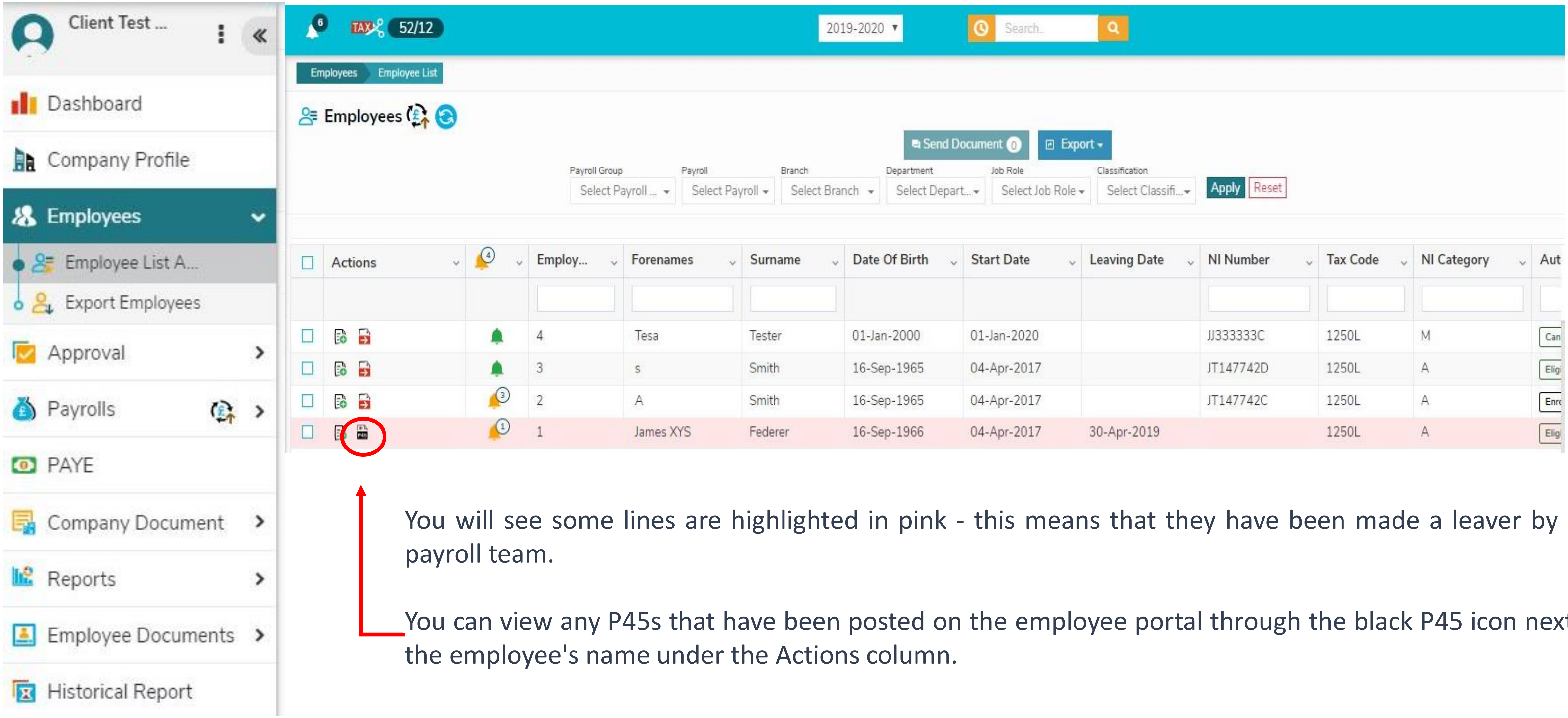
Once Approved, you will be able to view the documents by selecting ***Historical Report*** under the Main Menu.

If you have noticed something that needs adjusting on the reports, click on Reject and send a note detailing that a change will be required.

If you have further changes, upload them as a document through:
Company Document -> Upload Document.

Employee Details

You can view your employees’ details at any point by selecting ***<u>Employees -> Employee List A</u>***(dvanced) from the Main Menu



You will see some lines are highlighted in pink - this means that they have been made a leaver by the payroll team.

You can view any P45s that have been posted on the employee portal through the black P45 icon next to the employee's name under the Actions column.

Viewing Employees’ Payslips

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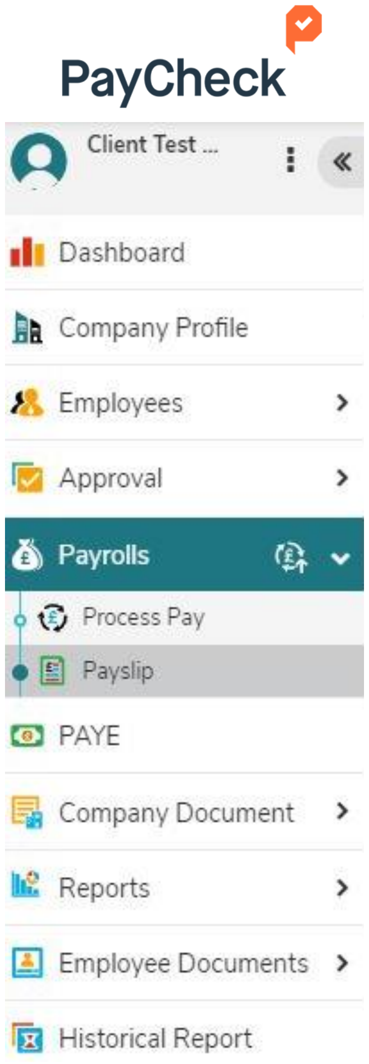
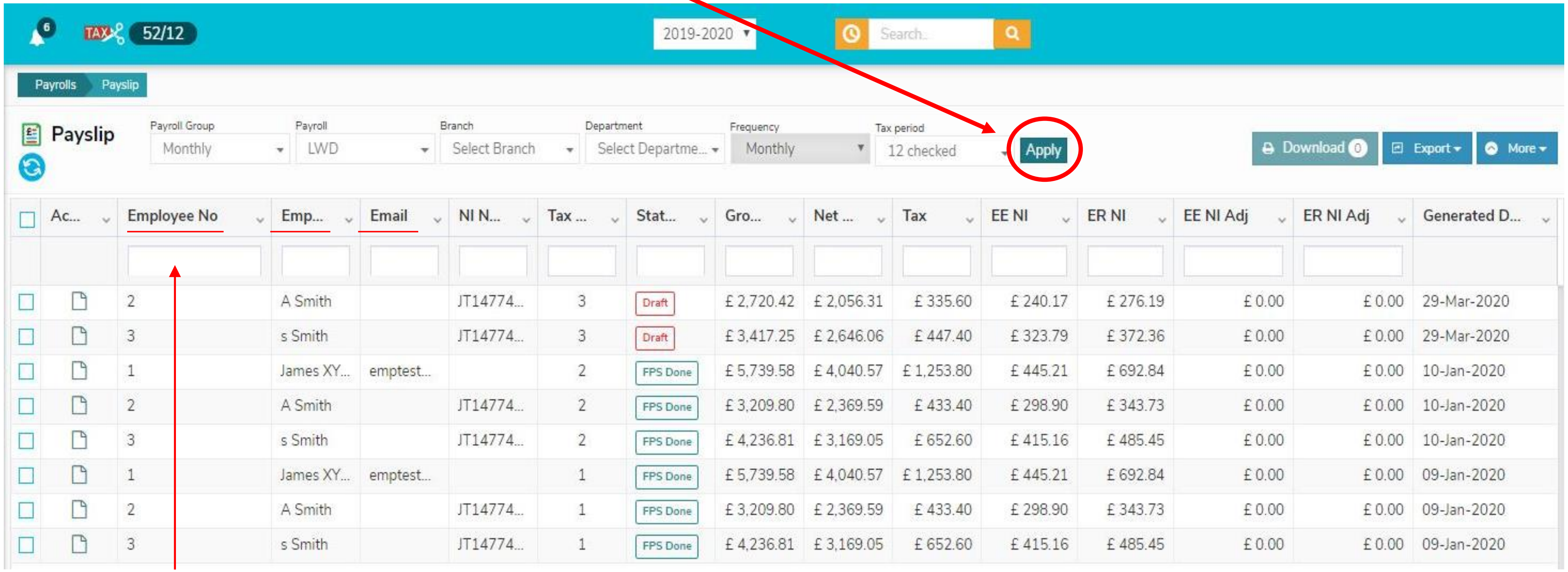
You can view all payslips through the Menu heading Payrolls -> Payslip. At the top of this page choose the frequency of the payroll (Monthly for most of our clients) and then under Tax Period choose as many periods as you would like to view (here we have selected all periods).



Then click Apply to view all lines available.



Ac...	Employee No	Emp...	Email	NI N...	Tax ...	Stat...	Gro...	Net ...	Tax	EE NI	ER NI	EE NI Adj	ER NI Adj	Generated D...
	2	A Smith		JT14774...	3	Draft	£ 2,720.42	£ 2,056.31	£ 335.60	£ 240.17	£ 276.19	£ 0.00	£ 0.00	29-Mar-2020
	3	s Smith		JT14774...	3	Draft	£ 3,417.25	£ 2,646.06	£ 447.40	£ 323.79	£ 372.36	£ 0.00	£ 0.00	29-Mar-2020
	1	James XY...	emptest...		2	FPS Done	£ 5,739.58	£ 4,040.57	£ 1,253.80	£ 445.21	£ 692.84	£ 0.00	£ 0.00	10-Jan-2020
	2	A Smith		JT14774...	2	FPS Done	£ 3,209.80	£ 2,369.59	£ 433.40	£ 298.90	£ 343.73	£ 0.00	£ 0.00	10-Jan-2020
	3	s Smith		JT14774...	2	FPS Done	£ 4,236.81	£ 3,169.05	£ 652.60	£ 415.16	£ 485.45	£ 0.00	£ 0.00	10-Jan-2020
	1	James XY...	emptest...		1	FPS Done	£ 5,739.58	£ 4,040.57	£ 1,253.80	£ 445.21	£ 692.84	£ 0.00	£ 0.00	09-Jan-2020
	2	A Smith		JT14774...	1	FPS Done	£ 3,209.80	£ 2,369.59	£ 433.40	£ 298.90	£ 343.73	£ 0.00	£ 0.00	09-Jan-2020
	3	s Smith		JT14774...	1	FPS Done	£ 4,236.81	£ 3,169.05	£ 652.60	£ 415.16	£ 485.45	£ 0.00	£ 0.00	09-Jan-2020

You can use the filter cells above the data to filter down, for example by employee number or surname.

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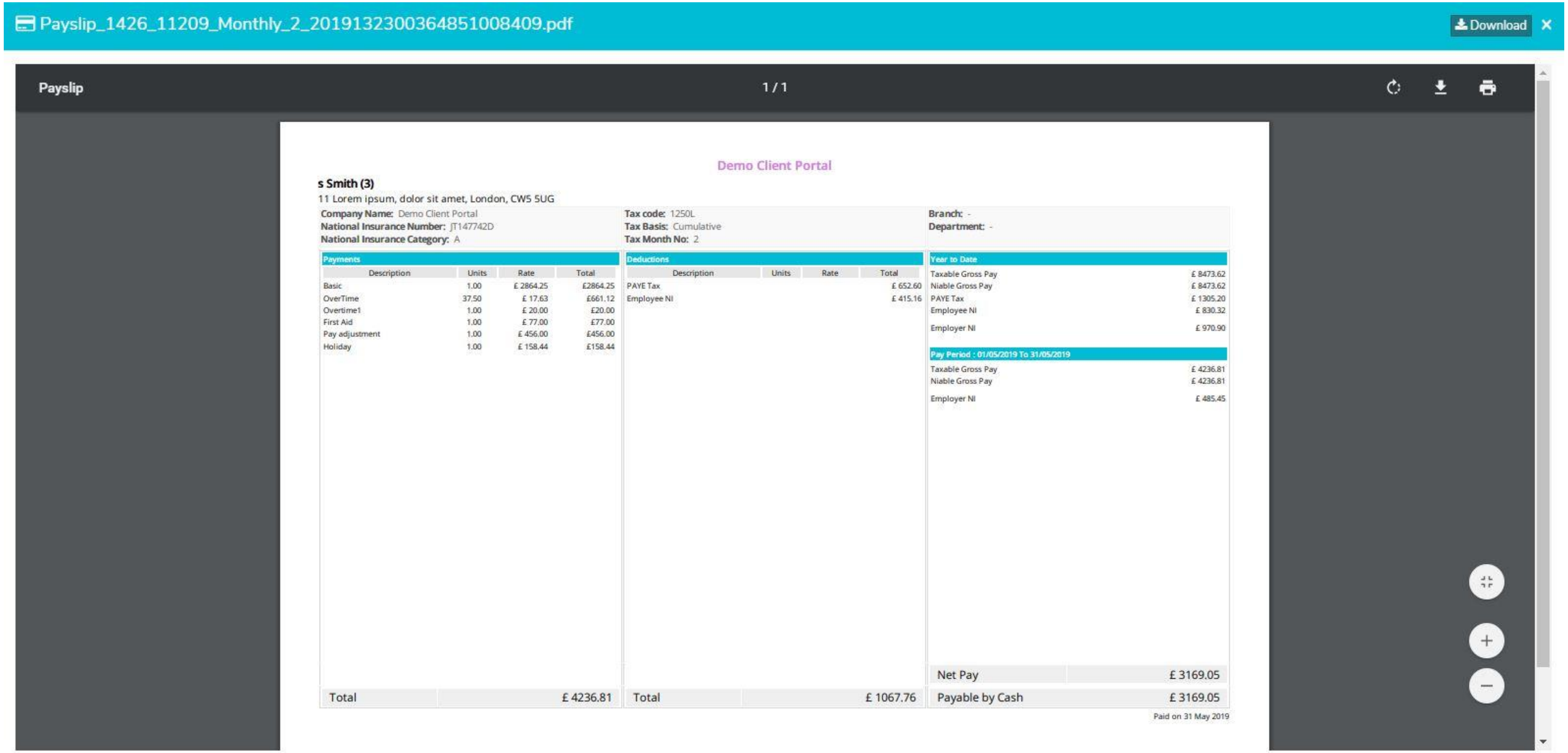
If you want to view an actual payslip rather than in table format, just click the white page icon next to the employee name, under the Actions column.
You will see the same payslip that your employees see, and like them you can download to save, print or just view.


Payslip_1426_11209_Monthly_2_2019132300364851008409.pdf
Download
Payslip
1 / 1

Demo Client Portal

s Smith (3)
11 Lorem ipsum, dolor sit amet, London, CW5 5UG

Company Name: Demo Client Portal
National Insurance Number: JT147742D
National Insurance Category: A

Tax code: 1250L
Tax Basis: Cumulative
Tax Month No: 2

Branch: -
Department: -

Payments

Description	Units	Rate	Total
Basic	1.00	£ 2864.25	£2864.25
OverTime	37.50	£ 17.63	£661.12
Overtime1	1.00	£ 20.00	£20.00
First Aid	1.00	£ 77.00	£77.00
Pay adjustment	1.00	£ 456.00	£456.00
Holiday	1.00	£ 158.44	£158.44
Total			£ 4236.81

Deductions

Description	Units	Rate	Total
PAYE Tax			£ 652.60
Employee NI			£ 415.16
Total			£ 1067.76

Year to Date

Taxable Gross Pay	£ 8473.62
Niable Gross Pay	£ 8473.62
PAYE Tax	£ 1305.20
Employee NI	£ 830.32
Employer NI	£ 970.90

Pay Period : 01/05/2019 To 31/05/2019

Taxable Gross Pay	£ 4236.81
Niable Gross Pay	£ 4236.81
Employer NI	£ 485.45
Net Pay	£ 3169.05
Payable by Cash	£ 3169.05

Paid on 31 May 2019

Our offices

View our offices in London and find the contact details for your nearest office.

Locate Office

Drop us a line

You can contact us by sending us an email or calling us directly.

Contact Us

Support

Learn more about us and find resources that will help you with all of our products.

Our Services

PayCheck

BACS
Approved Bureau

ISO
ISO 9001 Accredited

ISO
ISO 27001 Accredited

ACT
Trained and Assessed Staff