


# PayCheck




## Client Portal User Guide



Email

Password

[Forgot Password?](#)

Login



# 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.

# Firstly: Set up your Password



Email

Password

[Forgot Password?](#)

Login



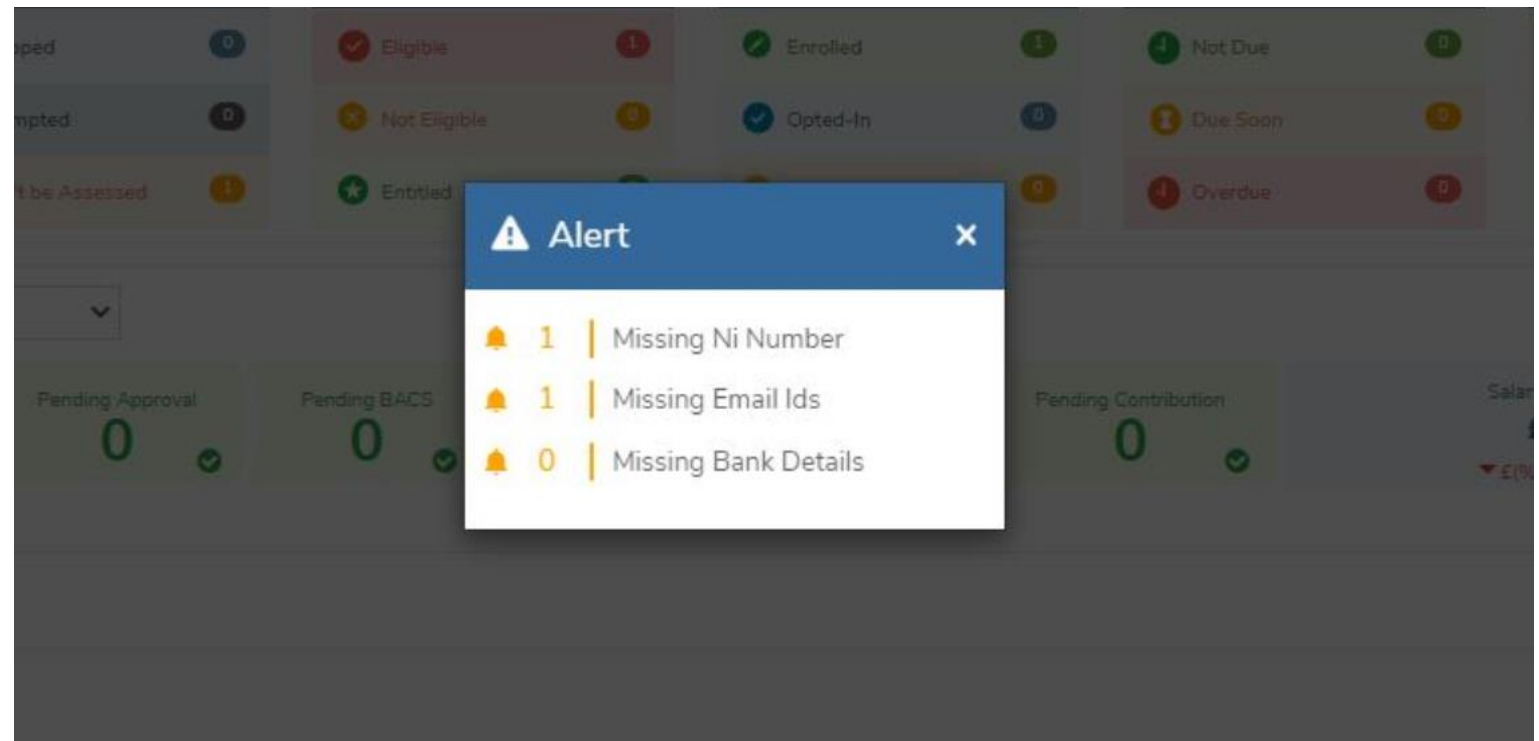
**Password format:** your password should be a minimum of 8 characters to include at least one uppercase letter, one lowercase letter, one special character (such as ! or ?) and one number.

# 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.



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

Missing Bank Details
✕

Employee No	Forename	Surname	PersonalEmail	Ni Number
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	A	Smith		JT147742C
3	s	Smith		JT147742D
4	Tesa	Tester	paycheck@paycheck.co.uk	JJ333333C

⏪
⏩
1
⏪
⏩

▼
Employee per page

1 - 3 of 3 items

📄 Export
➔ Close

	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

## PayCheck

Client Test ...

Dashboard

- Company Profile
- Employees
- Approval
- Payrolls
- P11D
- PAYE
- Company Document
- Reports
- Employee Documents
- Historical Report

## PayCheck

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

2019-2020 Search...

### Dashboard

Branch: Select Branch Department: Select Department Apply Reset

All (4)	Non Contributing (1)	Not Enrolled (2)	Contributing (1)	Postponed (0)	Opt Out (0)
Processing (3)	Stopped (0)	Eligible (2)	Enrolled (1)	Not Due (0)	Pending Refund (0)
Leaver (0)	Exempted (0)	Not Eligible (0)	Opted-In (0)	Due Soon (0)	Refunded (0)
Left (1)	Can't be Assessed (1)	Entitled (0)	Joined (0)	Overdue (0)	

Alerts (6)

- Missing NI Number (1)
- Missing Email Ids (2)
- Missing Bank Details (3)

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

Payroll: LWD 1




Total Employee	Pending Pay Information	Pending Approval	Pending BACS	Pending FPS(RTI)	Payslip Released	Pending Contribution	Salary	Employer NI	Employer Pension	Total Wage Bill
3	0	0	0	0	3	1	£13,186.00	£1,522.00	£81.00	£14,789.00
							▲£13,186(100%)	▲£1,522(100%)	▲£81(100%)	▲£14,789(100%)

Salary Employer NI Employer Pension

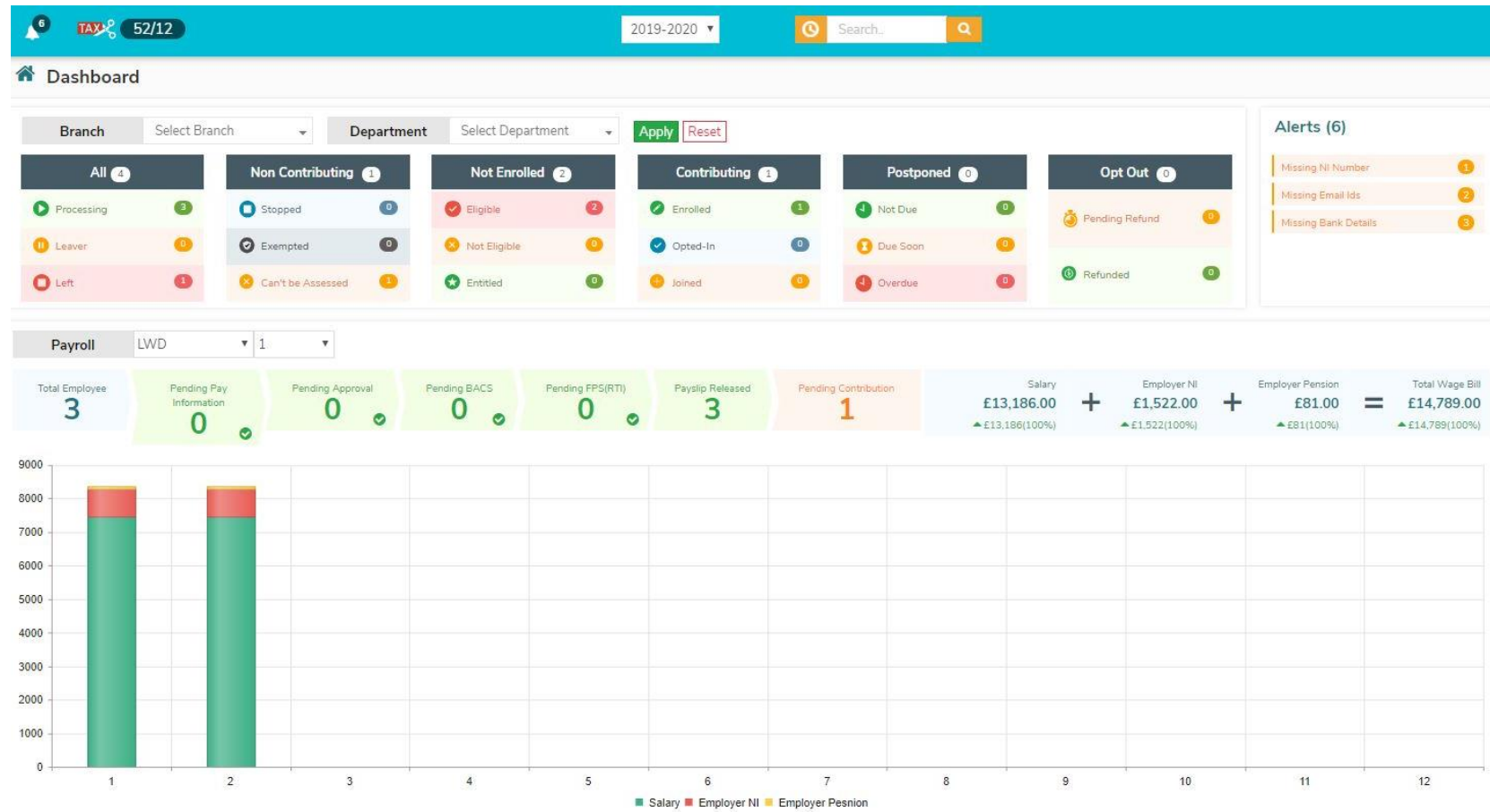
You can change the payroll month to view past data, and see your total employer costs to the middle right of the screen.

# Dashboard

## PayCheck

- Client Test ...   
- Dashboard
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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.



**Dashboard**

TAX 52/12 | 2019-2020 | Search

Branch: Select Branch | Department: Select Department | Apply | Reset

All (4)	Non Contributing (1)	Not Enrolled (2)	Contributing (1)	Postponed (0)	Opt Out (0)
Processing (3)	Stopped (0)	Eligible (2)	Enrolled (1)	Not Due (0)	Pending Refund (0)
Leaver (0)	Exempted (0)	Not Eligible (0)	Opted-In (0)	Due Soon (0)	Refunded (0)
Left (1)	Can't be Assessed (1)	Entitled (0)	Joined (0)	Overdue (0)	

Payroll: LWD | 1

Total Employee	Pending Pay Information	Pending Approval	Pending BACS	Pending FPS(RTI)	Payslip Released	Pending Contribution	Salary	Employer NI	Employer Pension	Total Wage Bill
3	0	0	0	0	3	1	£13,186.00	£1,522.00	£81.00	£14,789.00
							▲£13,186(100%)	▲£1,522(100%)	▲£81(100%)	▲£14,789(100%)

Bar Chart: Salary, Employer NI, Employer Pension

Category	Value
Salary	£13,186.00
Employer NI	£1,522.00
Employer Pension	£81.00

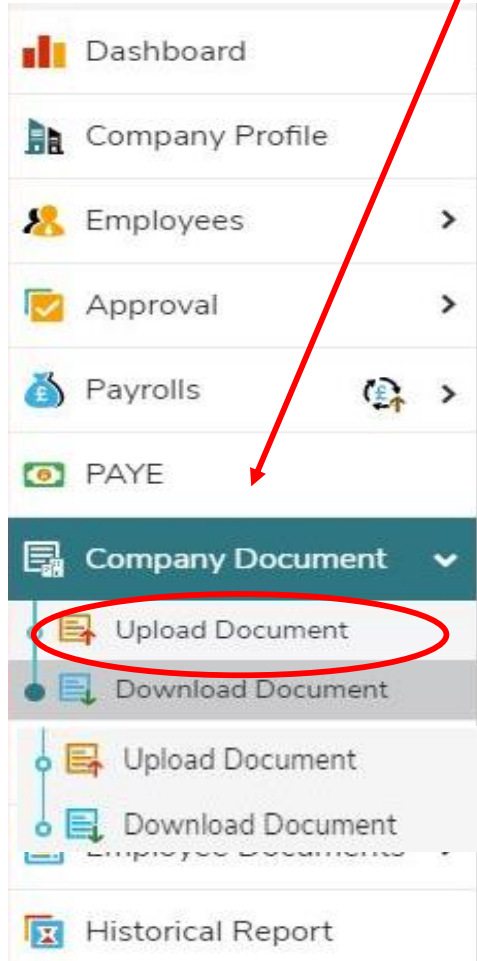
# Uploading and Downloading Company Documents



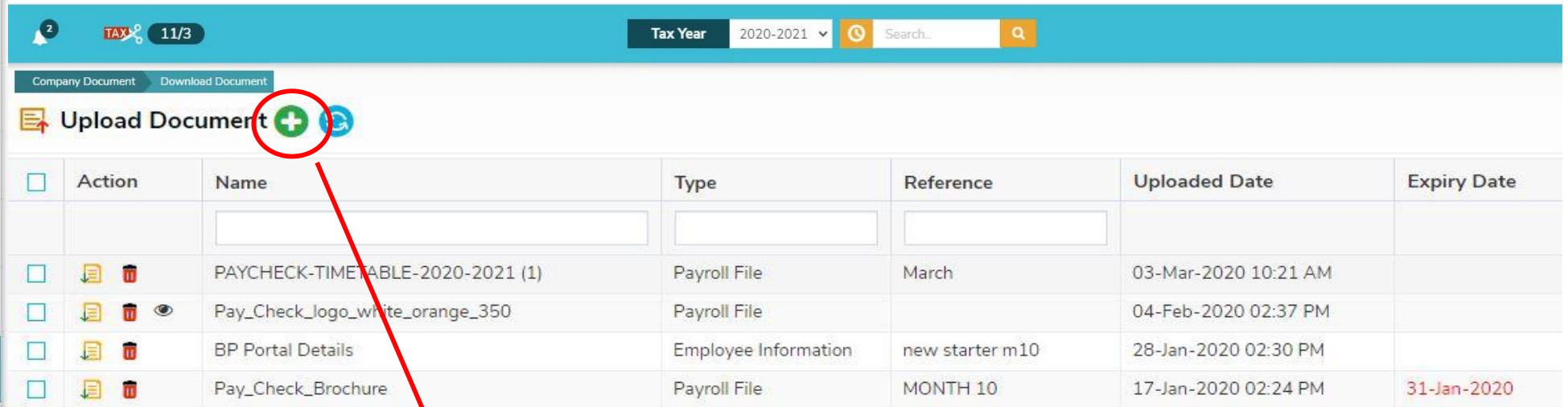
# Upload

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

You will see a list of your previous uploads












- Dashboard
- Company Profile
- Employees
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- Payrolls
- PAYE
- Company Document**
  - Upload Document**
  - Download Document
  - Upload Document
  - Download Document
  - Employee Documents
- Historical Report



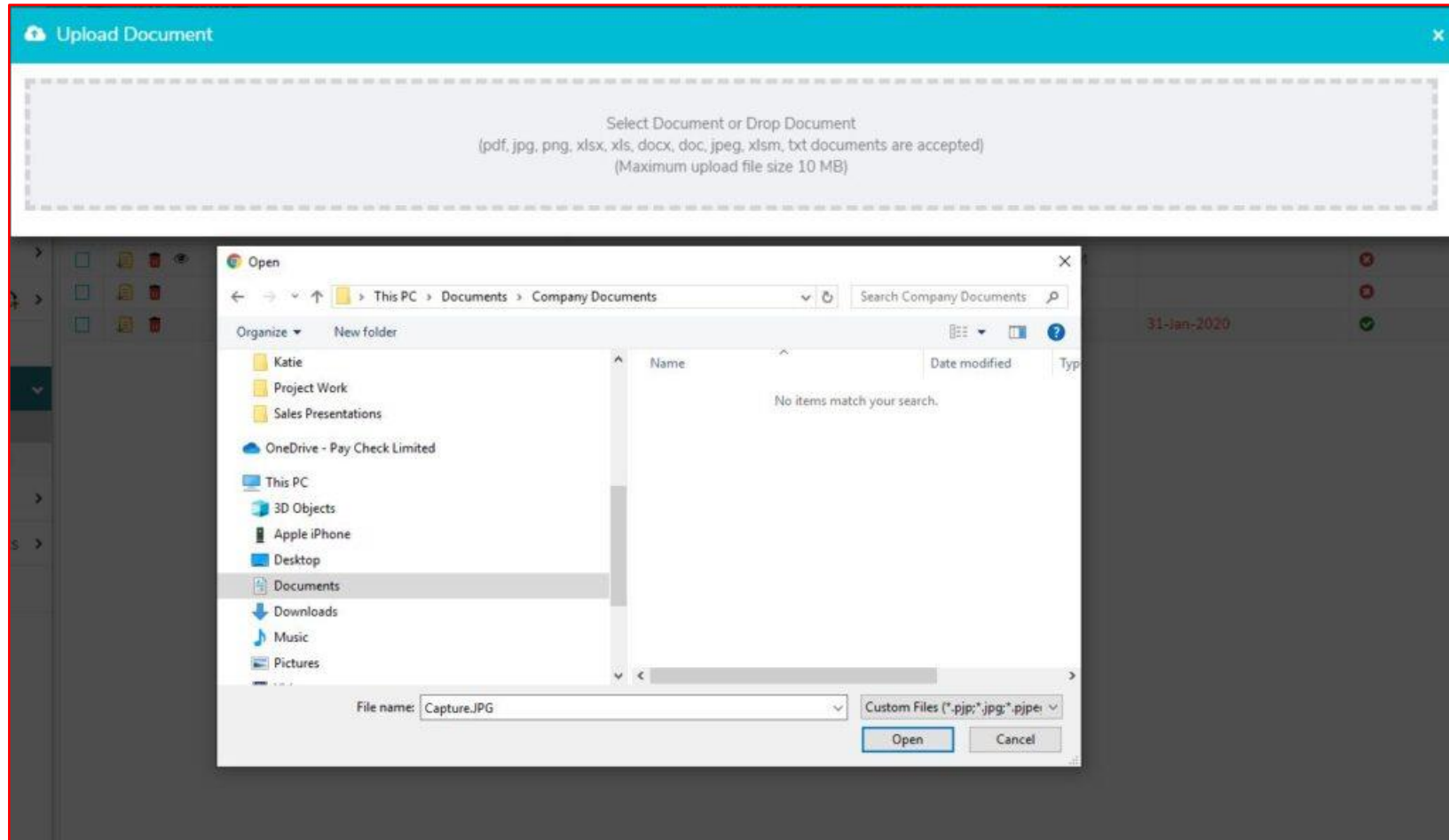
Company Document Download Document

### Upload Document

<input type="checkbox"/>	Action	Name	Type	Reference	Uploaded Date	Expiry Date
<input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>		
<input type="checkbox"/>	 	PAYCHECK-TIME TABLE-2020-2021 (1)	Payroll File	March	03-Mar-2020 10:21 AM	
<input type="checkbox"/>	  	Pay_Check_logo_white_orange_350	Payroll File		04-Feb-2020 02:37 PM	
<input type="checkbox"/>	 	BP Portal Details	Employee Information	new starter m10	28-Jan-2020 02:30 PM	
<input type="checkbox"/>	 	Pay_Check_Brochure	Payroll File	MONTH 10	17-Jan-2020 02:24 PM	31-Jan-2020

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

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.

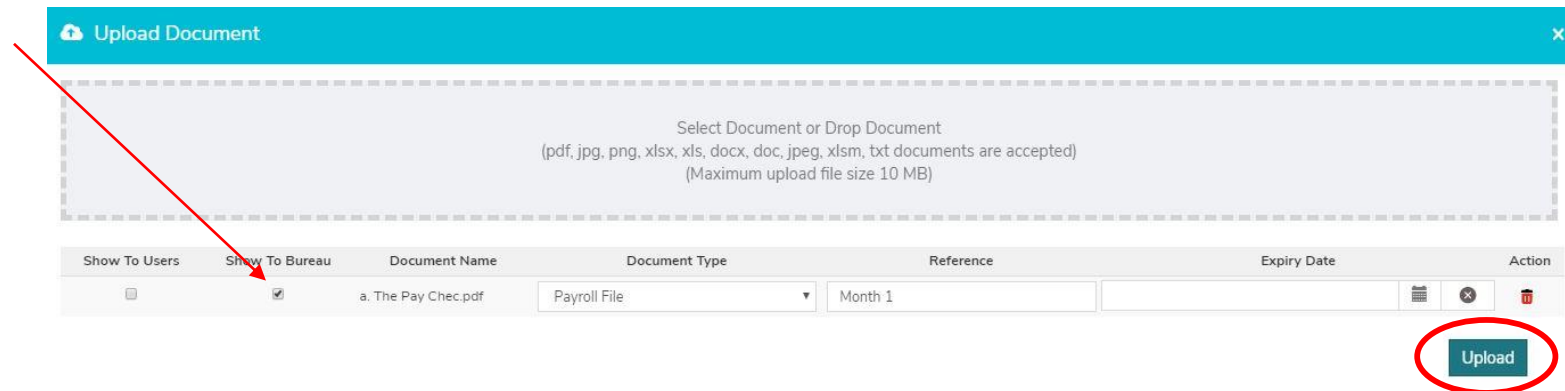
When you click Open you will be taken to an upload Menu

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

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)

**Click Upload**



Upload Document

Select Document or Drop Document  
(pdf, jpg, png, xlsx, xls, docx, doc, jpeg, xlsx, txt documents are accepted)  
(Maximum upload file size 10 MB)

Show To Users	Show To Bureau	Document Name	Document Type	Reference	Expiry Date	Action
<input type="checkbox"/>	<input checked="" type="checkbox"/>	a. The Pay Chec.pdf	Payroll File	Month 1		  

Upload

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

2 TAX 11/3
Tax Year 2020-2021 Search

Company Document Download Document

Upload Document Action

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


# Download


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

- Dashboard
- Company Profile
- Employees >
- Approval >
- Payrolls >
- PAYE
- Company Document** ▾
  - Upload Document
  - Download Document**
- Reports >
- Employee Documents >
- Historical Report

TAX 11/3 Tax Year 2020-2021 Search..

Company Document > Download Document


Download Document 

Action	Name	Type	Frequency	Tax Period	Number	Uploaded Date	Expiry Date
	MASTER STARTERS TEMPLATE	Payroll File	Monthly	3		19-Jun-2020 02:51 PM	

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

# Viewing Payroll Reports for Approval

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.















Client Test ...

- Dashboard
- Company Profile
- Employees
- Approval**
  - Detailed Approval
  - Employee Data Approval
  - Report Approval
- Payrolls
- PAYE
- Company Document
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- Historical Report

6 TAX 52/12 2019-2020 Search\_

Report Approval

Report Approval Frequency All Apply Reset Approve Reject

<input type="checkbox"/>	Action	Report Name	Type	Frequency	Period	Processed Stage	Bureau Comment	Generated On
<input type="checkbox"/>	 	Salary Report_Client Test User_Demo Client...	 PDF	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:56
<input type="checkbox"/>	 	Payroll Summary_Client Test User_Demo Cli...	 PDF	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55
<input type="checkbox"/>	 	Payment List All_Client Test User_Demo Clie...	 EXCEL	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55
<input type="checkbox"/>	 	Payroll Summary_Client Test User_Demo Cli...	 EXCEL	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55

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.

Client Test ...

- Dashboard
- Company Profile
- Employees
- Approval**
  - Detailed Approval
  - Employee Data Approval
  - Report Approval
- Payrolls
- PAYE
- Company Document
- Reports
- Employee Documents
- Historical Report

TAX 52/12 2019-2020 Search..

Report Approval

Report Approval Frequency All Apply Reset Approve Reject

<input type="checkbox"/>	Action	Report Name	Type	Frequency	Period	Processed Stage	Bureau Comment	Generated On
<input type="checkbox"/>		Salary Report_Client Test User_Demo Client...	PDF	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:56
<input type="checkbox"/>		Payroll Summary_Client Test User_Demo Cli...	PDF	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55
<input type="checkbox"/>		Payment List All_Client Test User_Demo Clie...	EXCEL	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55
<input type="checkbox"/>		Payroll Summary_Client Test User_Demo Cli...	EXCEL	Monthly	3	Draft	Please review for approval	29-Mar-2020 17:55

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 Employees -> Employee List A(dvanced) from the Main Menu

The screenshot displays the 'Employee List A' page in the PayCheck system. The top navigation bar shows the current tax year as 2019-2020 and includes a search function. Below the navigation, there are filters for Payroll Group, Payroll, Branch, Department, Job Role, and Classification. The main data table lists employee records with the following columns: Actions, Employment ID, Forenames, Surname, Date of Birth, Start Date, Leaving Date, NI Number, Tax Code, and NI Category. The last row, representing James XYs Federer, is highlighted in pink, indicating a leaver. A red circle highlights a black P45 icon in the Actions column for this employee, with a red arrow pointing to the following text.

Actions	Employ...	Forenames	Surname	Date Of Birth	Start Date	Leaving Date	NI Number	Tax Code	NI Category	Aut
	4	Tesa	Tester	01-Jan-2000	01-Jan-2020		JJ333333C	1250L	M	Can
	3	s	Smith	16-Sep-1965	04-Apr-2017		JT147742D	1250L	A	Elig
	2	A	Smith	16-Sep-1965	04-Apr-2017		JT147742C	1250L	A	Enre
	1	James XYs	Federer	16-Sep-1966	04-Apr-2017	30-Apr-2019		1250L	A	Elig

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

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.

Client Test ...

- Dashboard
- Company Profile
- Employees >
- Approval >
- Payrolls**
  - Process Pay
  - Payslip**
- PAYE
- Company Document >
- Reports >
- Employee Documents >
- Historical Report

2019-2020 Search

Payrolls Payslip

Payslip  
 Payroll Group: Monthly  
 Payroll: LWD  
 Branch: Select Branch  
 Department: Select Department  
 Frequency: Monthly  
 Tax period: 12 checked **Apply**

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.

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	Tax code: 1250L	Branch: -
National Insurance Number: JT147742D	Tax Basis: Cumulative	Department: -
National Insurance Category: A	Tax Month No: 2	

Payments				Deductions				Year to Date		
Description	Units	Rate	Total	Description	Units	Rate	Total			
Basic	1.00	£ 2864.25	£2864.25	PAYE Tax			£ 652.60	Taxable Gross Pay	£ 8473.62	
Overtime	37.50	£ 17.63	£661.12	Employee NI			£ 415.16	Niable Gross Pay	£ 8473.62	
Overtime1	1.00	£ 20.00	£20.00					PAYE Tax	£ 1305.20	
First Aid	1.00	£ 77.00	£77.00					Employee NI	£ 830.32	
Pay adjustment	1.00	£ 456.00	£456.00					Employer NI	£ 970.90	
Holiday	1.00	£ 158.44	£158.44							
<b>Total</b>				<b>Total</b>				<b>Net Pay</b>		<b>£ 3169.05</b>
			<b>£ 4236.81</b>				<b>£ 1067.76</b>	<b>Payable by Cash</b>		<b>£ 3169.05</b>

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

Taxable Gross Pay	£ 4236.81
Niable Gross Pay	£ 4236.81
Employer NI	£ 485.45

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](#)



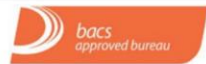
## Support

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