



# The trusted payroll company

ePay Portal: Client HR User Guide

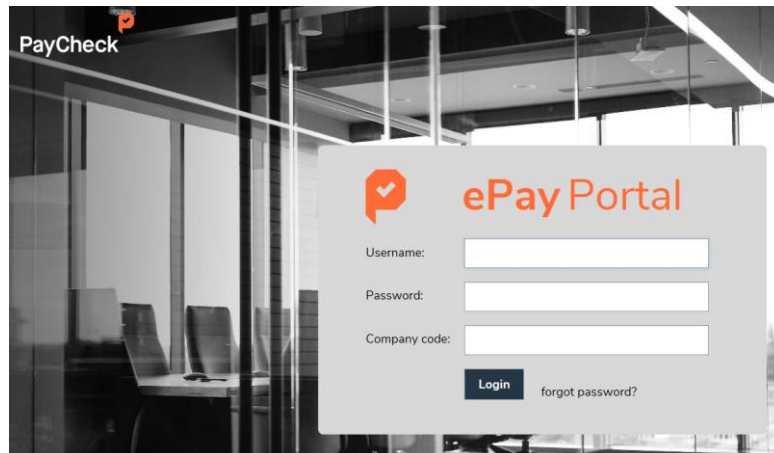


## Logging in:

Log into <http://portal.paycheck.co.uk>

Your initial welcome email will assist you in setting up your password and inform you of your username and company code going forward.

Your password must be a minimum of 8 characters with 2 non-alphanumeric characters, for example: ? or ! or \* or /

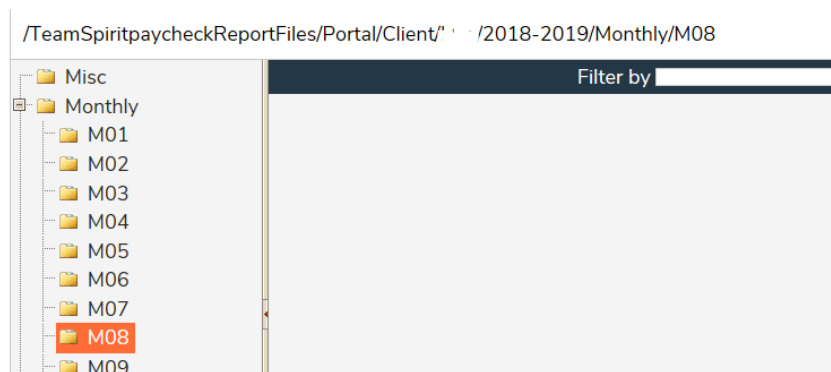


## To upload Payroll Instructions:

Select 'Client Input' on the Menu bar:

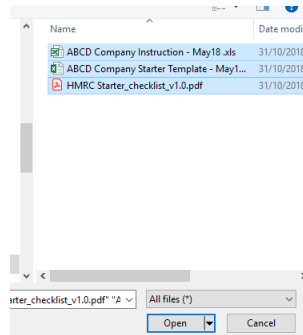


Click on the pay frequency (Monthly) and the pay period you are uploading instructions for (example M01 = April to M12 = March)

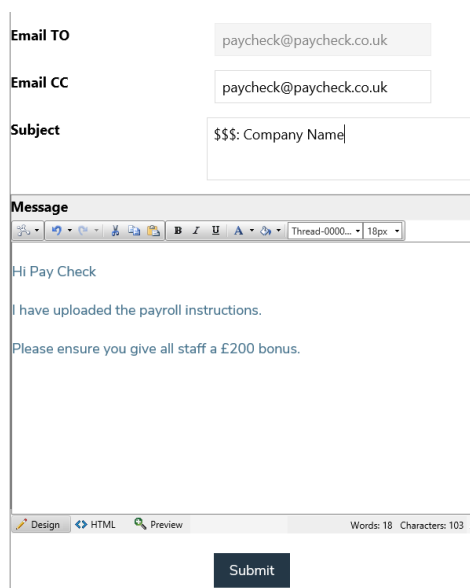


You can select more than one document to upload at one time, as long as the total file size does not exceed 10MB. You cannot upload Outlook emails – all text needs to be in a Word, Excel or PDF document.

Click 'Open' and click on the 'Upload' icon

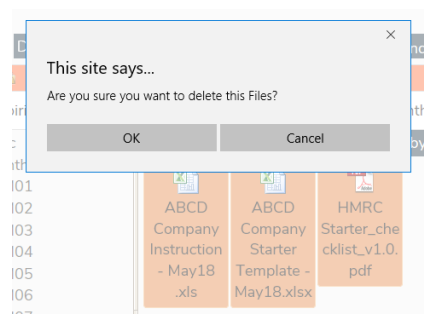


Select 'Send Email' icon to send Pay Check an email to notify the payroll instructions have been uploaded and any comments you wish to reference to them. Click 'Submit'



Pay Check will now process the payroll and let you know when reports have been uploaded.

If you need to delete a document/s select the documents and click on the delete icon. Select 'OK' for each document

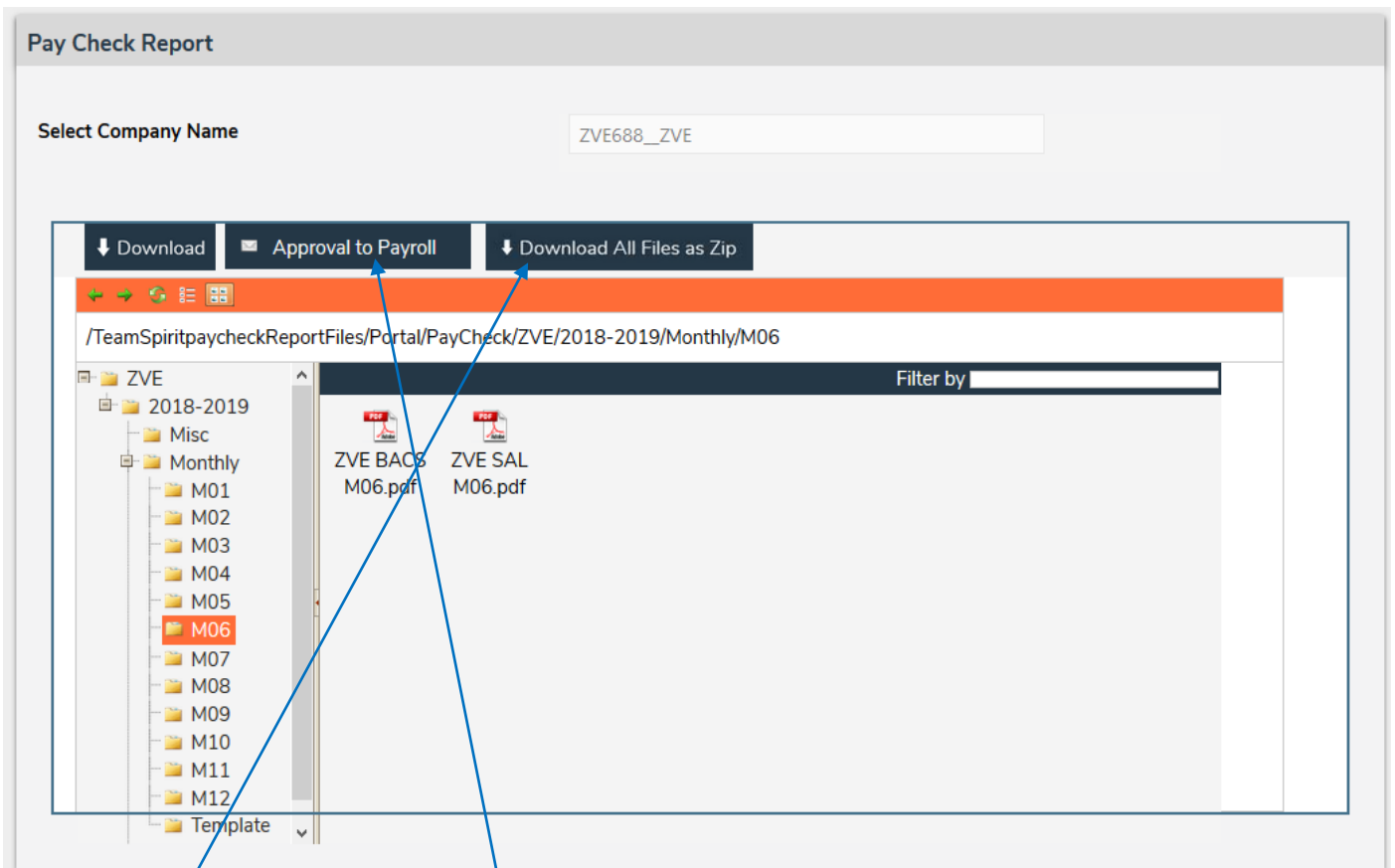


## View/check Pay Check payroll reports:

Select 'Pay Check Reports' on the Menu bar:

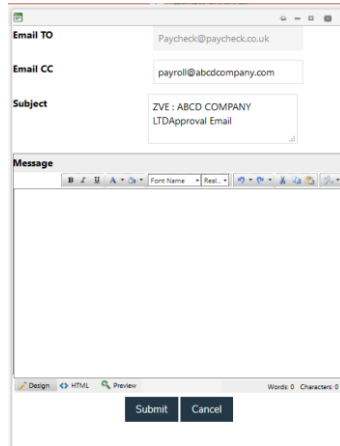


Select the tax year you wish to view '2018-2019' then the pay frequency 'Monthly', select the tax months you wish to view reports for:



You can **download** the reports to your PC, tablet or phone.

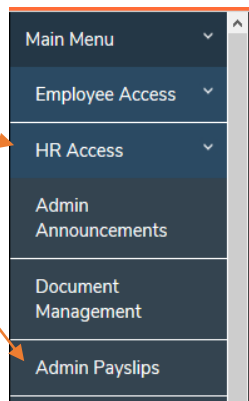
Once reviewed and checked one can **amend/action/approve the payroll** with a written message to your account manager:



## View/manage payslips:

Under the Main Menu select

1. HR Access
2. Admin Payslips



## Searching for the right employee(s): 2 options

Option 1: Fill in the criteria of the employee

Admin Payslips

### Admin Payslip Details

Select Pay Frequency:

Search Criteria:

Match Criteria:

Choose Year:

S.No	View/Print	Save PDF / Send mail	Employee Code	First Name	Surname	Employee Full Name	Department	Month	Year	Pay Period	Pay Frequency	Tax Period
1			1	JOE	BLOGGS	JOE BLOGGS		September	2018	28/09/2018	Monthly	6
2			1	JOE	BLOGGS	JOE BLOGGS		August	2018	31/08/2018	Monthly	5
3			1	JOE	BLOGGS	JOE BLOGGS		July	2018	31/07/2018	Monthly	4
4			1	JOE	BLOGGS	JOE BLOGGS		June	2018	29/06/2018	Monthly	3
5			1	JOE	BLOGGS	JOE BLOGGS		May	2018	31/05/2018	Monthly	2
6			2	JOHN	SMITH	JOHN SMITH		September	2018	28/09/2018	Monthly	6
7			2	JOHN	SMITH	JOHN SMITH		August	2018	31/08/2018	Monthly	5
8			2	JOHN	SMITH	JOHN SMITH		July	2018	31/07/2018	Monthly	4
9			2	JOHN	SMITH	JOHN SMITH		June	2018	29/06/2018	Monthly	3
10			2	JOHN	SMITH	JOHN SMITH		May	2018	31/05/2018	Monthly	2

Option 2: Use the search bar filters

This will narrow down the search

### To view and manage payslips:

Select the icon for the magnifying glass to **view** the payslip

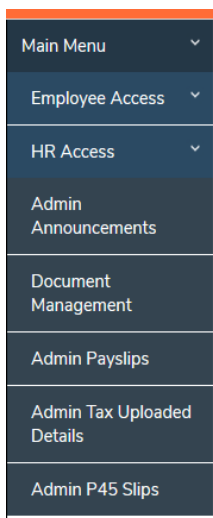
S.No	View/Print	Save PDF / Send mail	Employee Code	First Name	Surname	Employee Full Name	Department	Month
1			1	JOE	BLOGGS	JOE BLOGGS		September
2			1	JOE	BLOGGS	JOE BLOGGS		August
3			1	JOE	BLOGGS	JOE BLOGGS		July
4			1	JOE	BLOGGS	JOE BLOGGS		June
5			1	JOE	BLOGGS	JOE BLOGGS		May

To **download** the payslips to PDF select the save icon

### View/manage P45's:

Under the Main Menu select

1. HR Access
2. Admin P45 Slips



## Searching for the right employee(s): 2 options

Option 1: Fill in the criteria of the employee

Admin View P45 Details

Select Pay Frequency: All

Search Criteria: Employee Code

Match Criteria: Anywhere

Choose Year: --Select Month-- -- Choose Year --

View Download

S.No	View/Print	Save PDF/Send mail	Employee Code	First Name	Surname	Employee Full Name	Department	Month
1			2	JOHN	SMITH	SMITH JOHN		September

Option 2: Use the search bar filters

This will narrow down the search

### To view and manage P45's:

Select the icon for the magnifying glass to **view** the P45

Admin View P45 Details

Select Pay Frequency: All

Search Criteria: Employee Code

Match Criteria: Anywhere

Choose Year: --Select Month-- -- Choose Year --

View Download

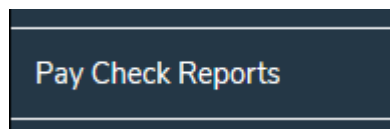
S.No	View/Print	Save PDF/Send mail	Employee Code	First Name	Surname	Employee Full Name	Department	Month
1	🔍 🖨	📄 ✉	2	JOHN	SMITH	SMITH JOHN		September

To download

the payslips to PDF select the save icon

## View/manage Payroll Template Instruction:

Select 'Pay Check Reports' on the Menu bar:



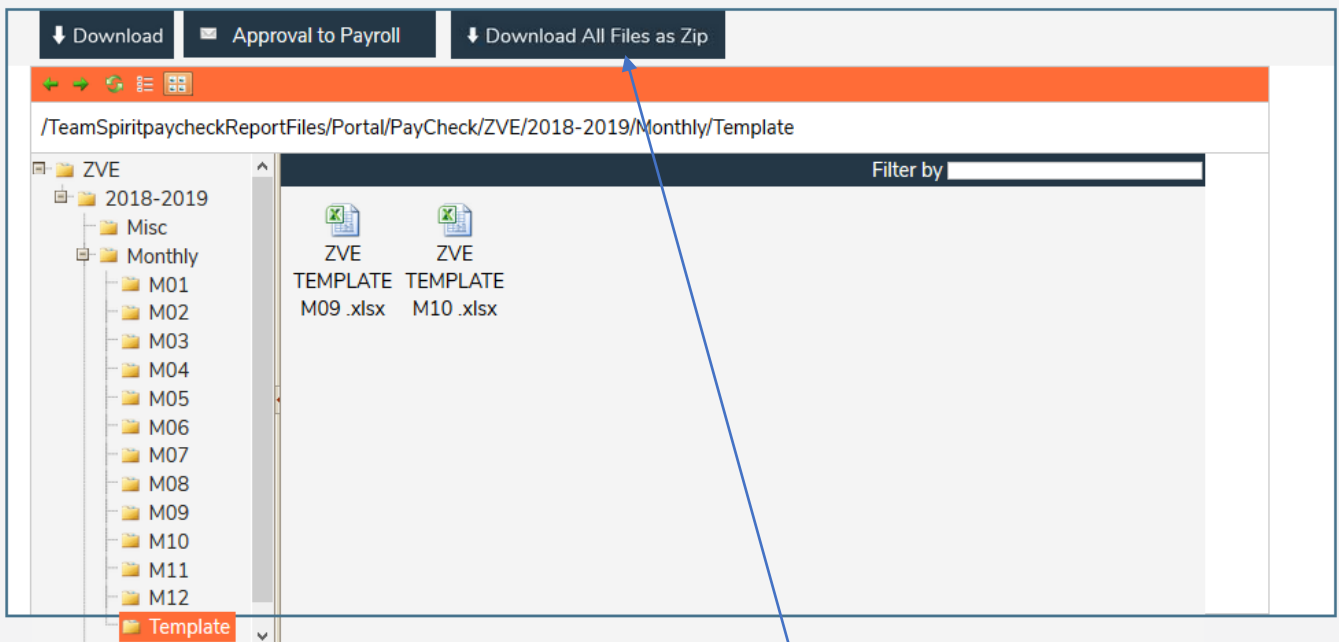
Select the tax year you wish to view '2018-2019' then the pay frequency 'Monthly', select the 'Template' folder



## Pay Check Report

Select Company Name

ZVE688\_ZVE



You can download the template required by selecting the 'Download All Files as Zip'

Your template will be uploaded at the start of each tax month