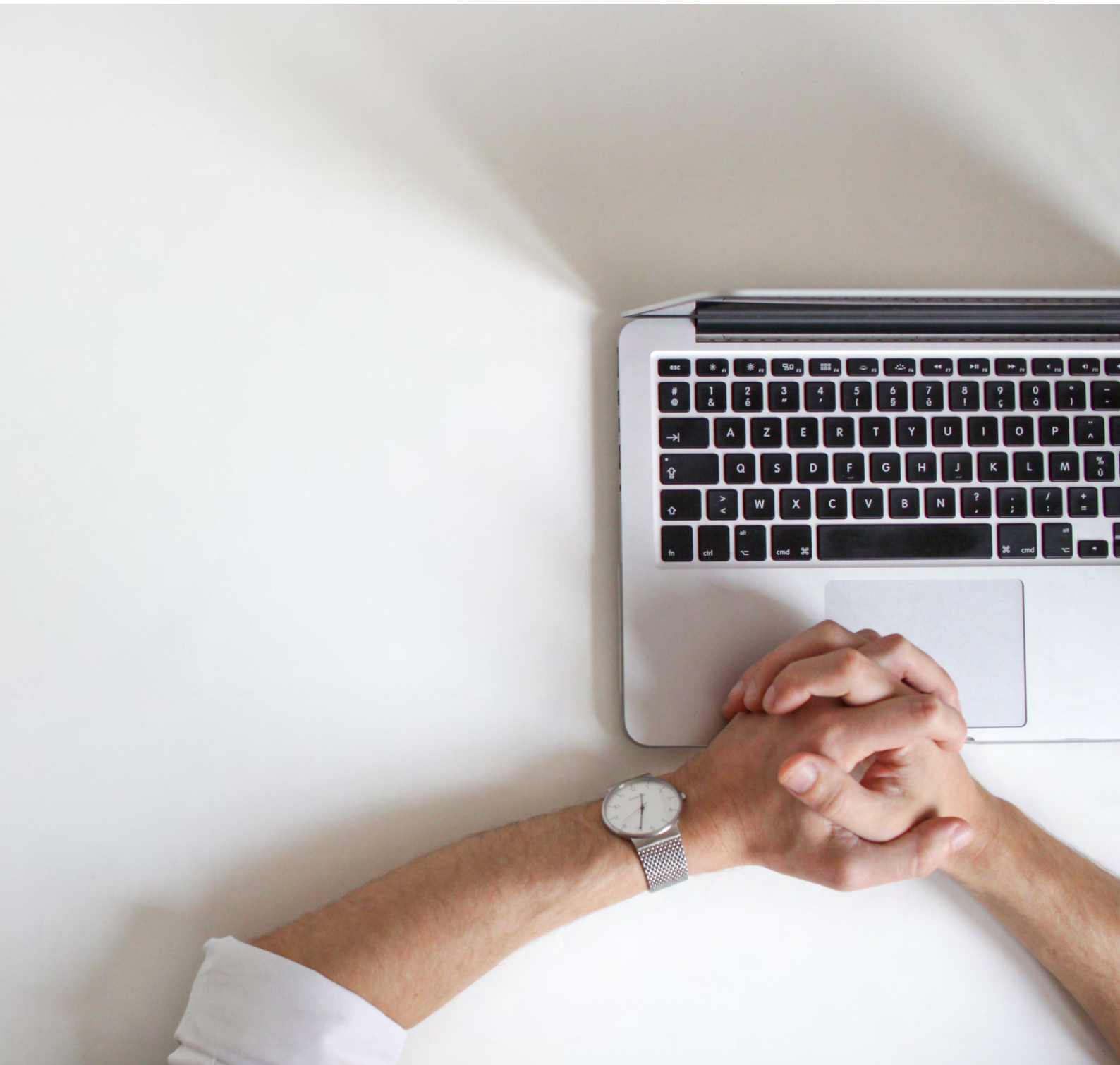


# Client Portal User Guide





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# Welcome to Pay Check's Client Portal User Guide

The client portal is user friendly and allows for secure data transfer within our payroll software system. The portal eliminates the need for data transfer between systems. For those interested in heightened security, 2 Factor-Authentication is available for both Client and Employee portals. Please reach out to your designated payroll manager if this is something you would like to implement.

Additionally, we offer a dedicated employee portal where payslips P45s, P60s and P11Ds are shared. The portals are fully accessible on mobile and tablet devices, ensuring an optimal user experience. Should you encounter any resolution issues, they can be easily resolved by adjusting your browser settings to zoom out.



## Password Setup

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



Email <sup>\*</sup>

Password <sup>\*</sup>

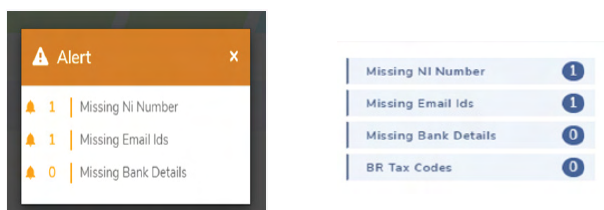
[Forgot Password?](#)

Login

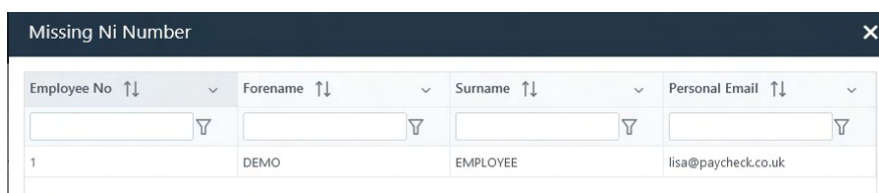


# Alerts

Upon logging in, a pop up will appear displaying any important information missing for your employees such as NI Number, Email Address and Bank Details. You can close this alert and you will then find the same information on the right-hand side of the screen.



By selecting an alert located on the right-hand side of the screen, a new pop up will appear showing you which employees have missing information. If any of your employee information is missing you can submit this with your next payroll submission.

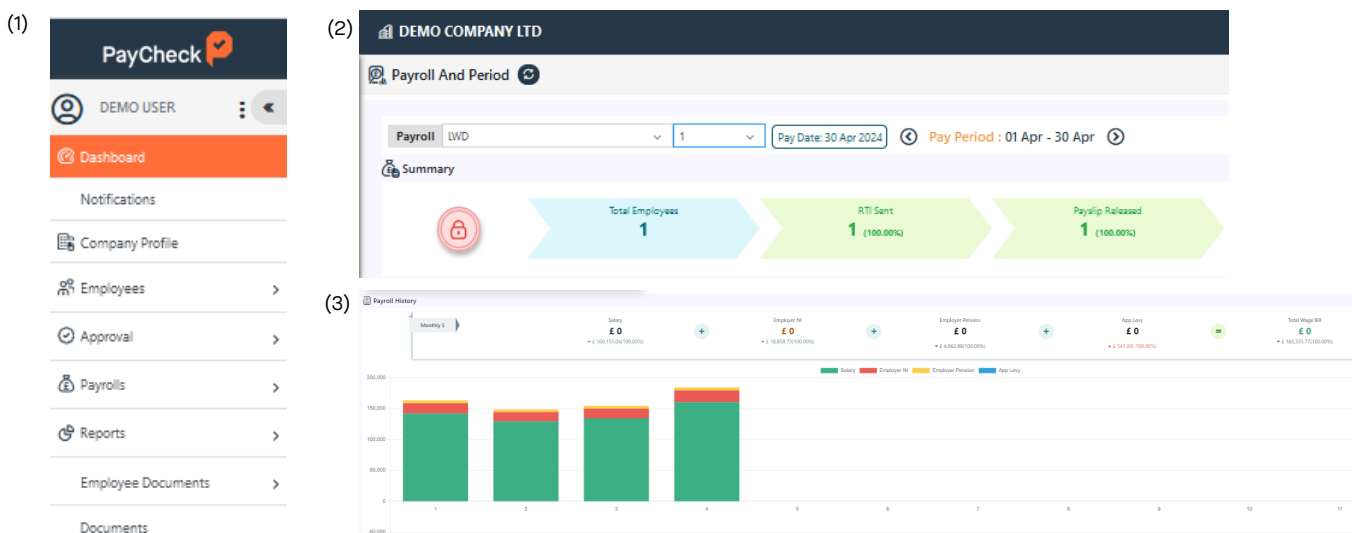


# Portal Dashboard

(1) When logging in, the first page you will see is your Dashboard.

(2) If you operate a payroll with multiple frequencies being processed, you can select the pay frequency you want to display the information for here, you can also change between pay periods. This screen displays a summary of the payroll for the selected period for example if your RTI has been sent to HMRC and payslips released to employees. As each stage is completed it will turn to green.

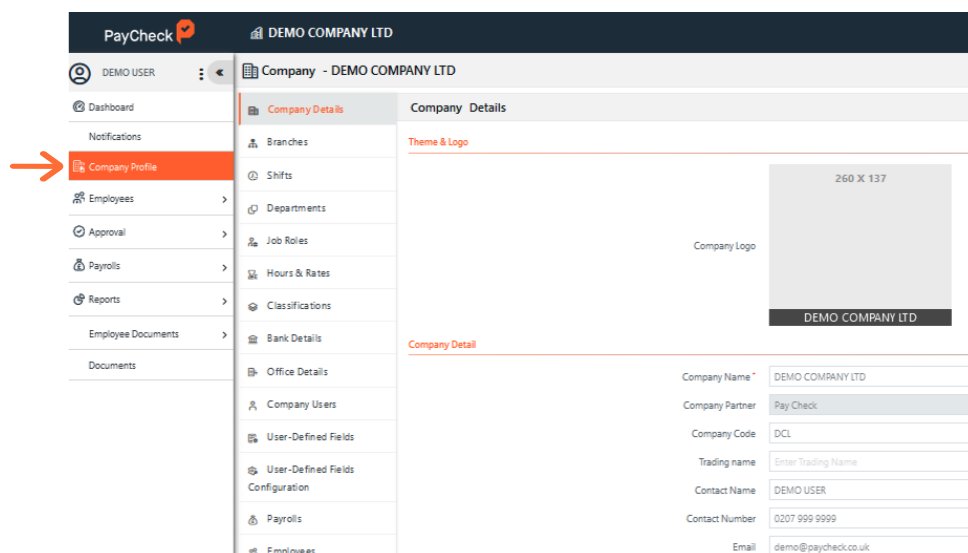
(3) Just beneath this you can see an overview of your employer costs for the month. There is also a handy bar chart displaying your costs for previous periods.





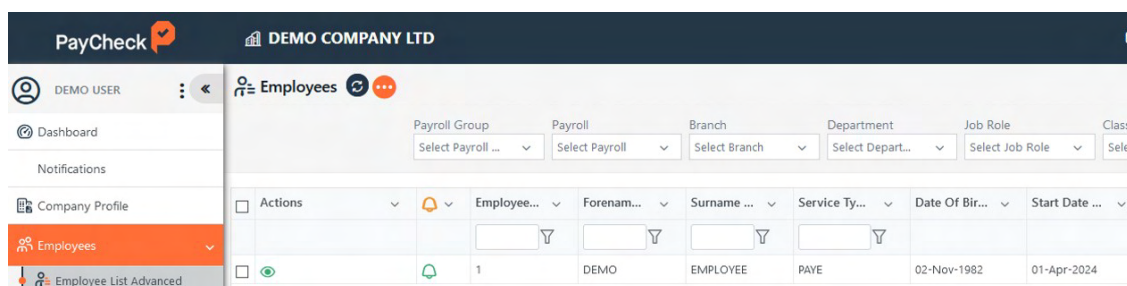
# Company Profile

Under 'Company Profile' you can see all the information we hold for your company such as your address, HMRC reference numbers and those who are set up as 'Company Users' to access the portal. If you need any information in this section updated, please send the updated details with your next payroll submission.

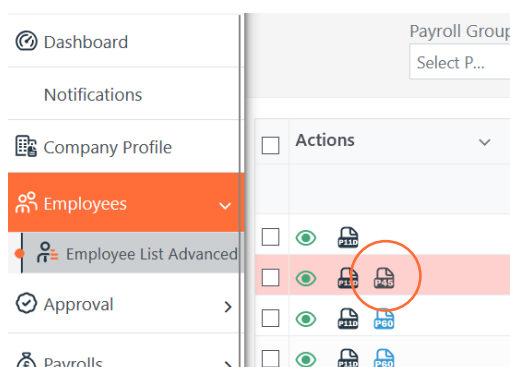


# Employee Details

Under the 'Employee' tab you can find a list of your employees. You can search via Employee Number, Forename, Surname or even filter by Department or Branch.

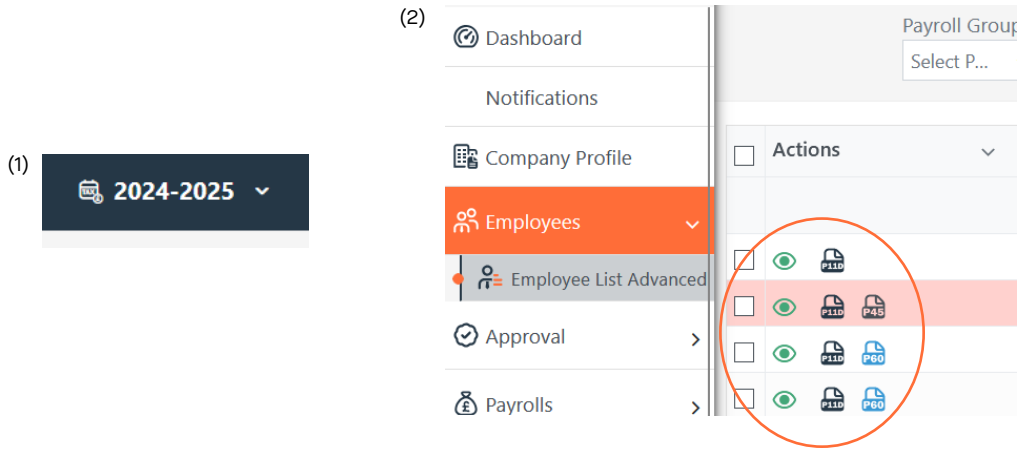


Leavers will appear in pink, and you can view and download their P45 under 'Actions' by selecting the icon as circled below.



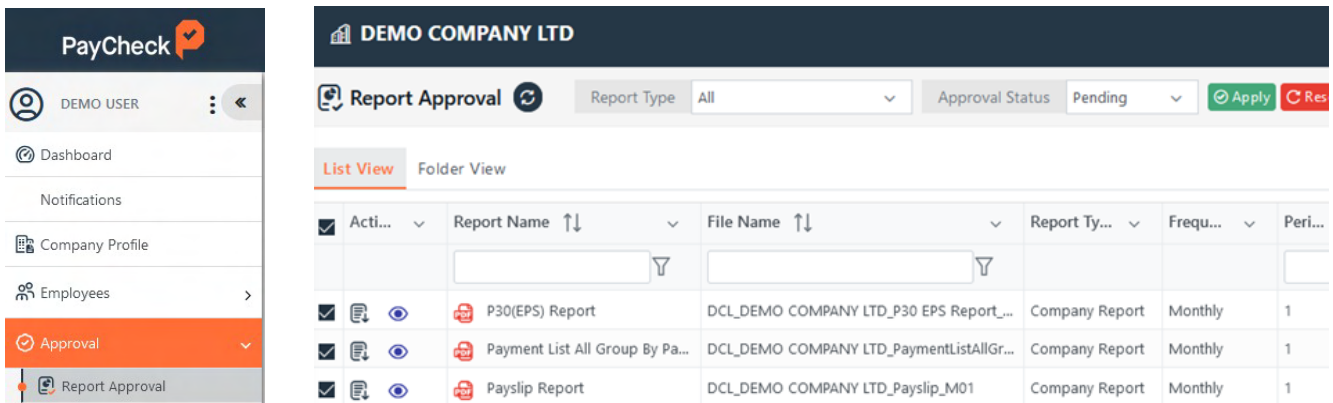


(1) To find P6Os and P11Ds first you must change to the relevant tax year from the top centre of the page as shown. (2) Under this section you can view and download individual P11Ds and P6Os under 'Actions' by selecting the icon as circled below.

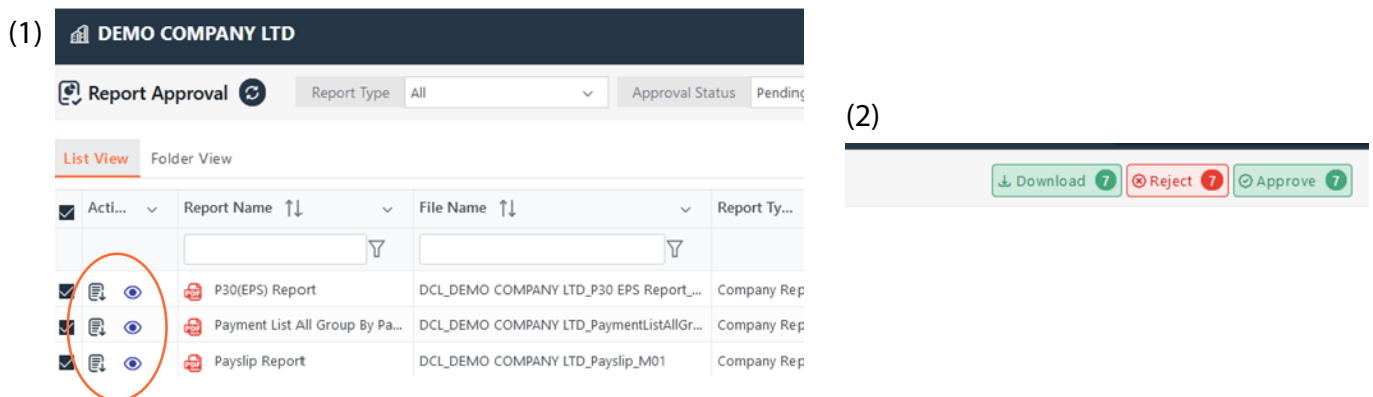


# Report Approval and Rejections

When your payroll has been run and your payroller has uploaded the reports they will appear under Approval – Report Approval. When the approval status filter shows as 'Pending', reports pending approval will show.



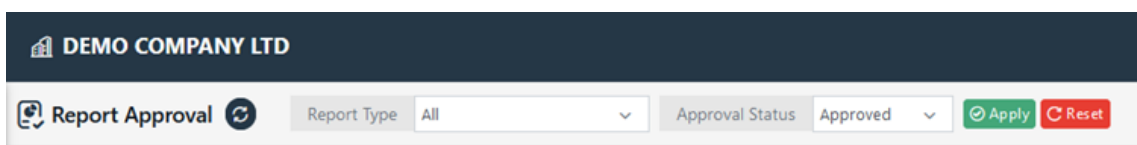
(1) Here you can download files for checking. (2) You can also select multiple files to download, Approve or Reject accordingly.





If you select 'Reject' you will see a box as shown below where you can enter comments relating to the changes required. Please refrain from entering any personal details such as addresses, bank details, salary details etc.

Once you have approved or rejected your reports, an automated email is sent to your payroller including any comments made. After the reports have been approved or rejected you can view them by adjusting the 'Approval Status' filter.



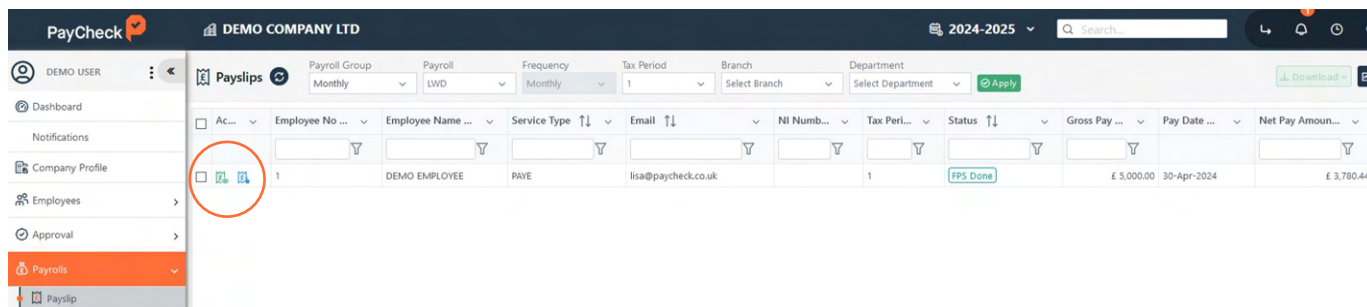
The second tab 'Folder View' stores all final approved reports in one easy location.

Folder Name	Uploaded On
Report (7 Files)	12-Aug-2024 11:00 AM
Monthly (7 Files)	12-Aug-2024 11:00 AM
1 (7 Files)	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_P30 EPS Report_M01	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_PaymentListAllGroupByPaymentMethod_M01	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_Payslip_M01	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_SAL_M01	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_Job Sheet Report_M01	12-Aug-2024 11:00 AM
DCL_DEMO COMPANY LTD_STARTER_M01	12-Aug-2024 10:59 AM
DCL_DEMO COMPANY LTD_SAL_M01	12-Aug-2024 10:59 AM

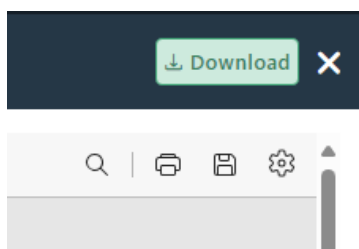


# Payslips

Payslips for all employees can be viewed under the 'Payrolls' tab. You can view the payslips in the browser by selecting the icons below.

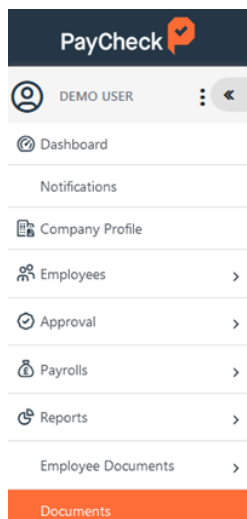


When the payslip is open, you will see an option in the top right to download the file.



# Documents

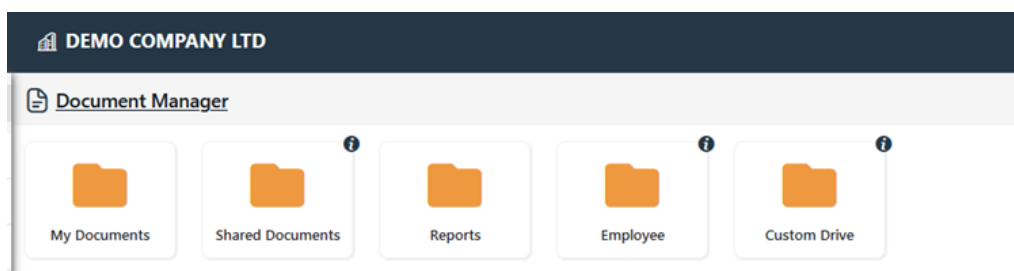
The 'Documents' section allows you to upload payroll documents to us and also to locate documents we have sent back to you. Pension Files and SMP Schedules are examples of documents you may find shared with you here.



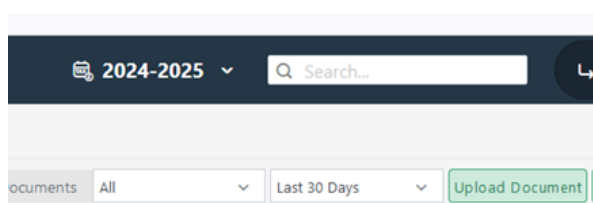




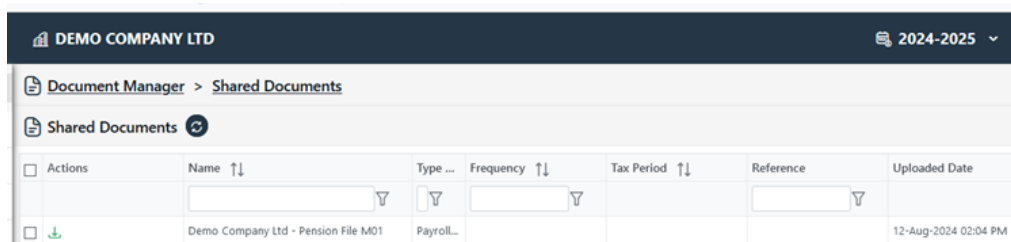
Documents are separated out into folders as shown below.



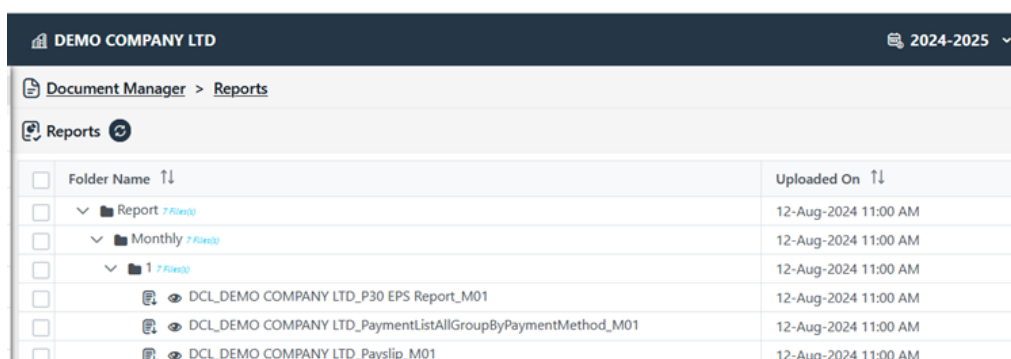
'My Documents' shows documents you have loaded to us at Pay Check. You can also upload new documents to us from here.



The 'Shared Documents' folder will house documents we have shared with you.



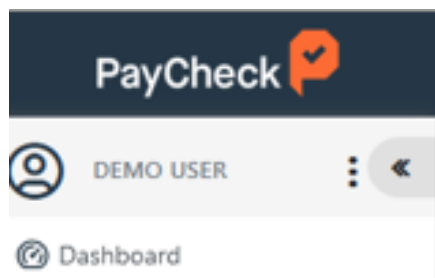
The 'Reports' folder will house all of your final approved reports. This replicates the final reports found in the 'Folder View' of the 'Report Approval' Section.



The 'Employee Documents' section will contain any documents your employees have shared with you via the portal. The 'Custom Drive' section is not a feature in use.



To log out of the portal you can select the 3 dots in the top left of the page which will then bring up several options. Simply select Logout. Here you can also change your password.



# Frequently Asked Questions

## **How long do my employees have access to the portal after leaving the company?**

Your employees will have access to the portal for two months after leaving the company.

## **I need to add or remove a user from the portal, how do I action this?**

Please contact your designated payroll contact to update user access information.



## **Thank you** for reading our Client Portal User Guide

For a more in-depth view please contact your designated payroll manager for further support.