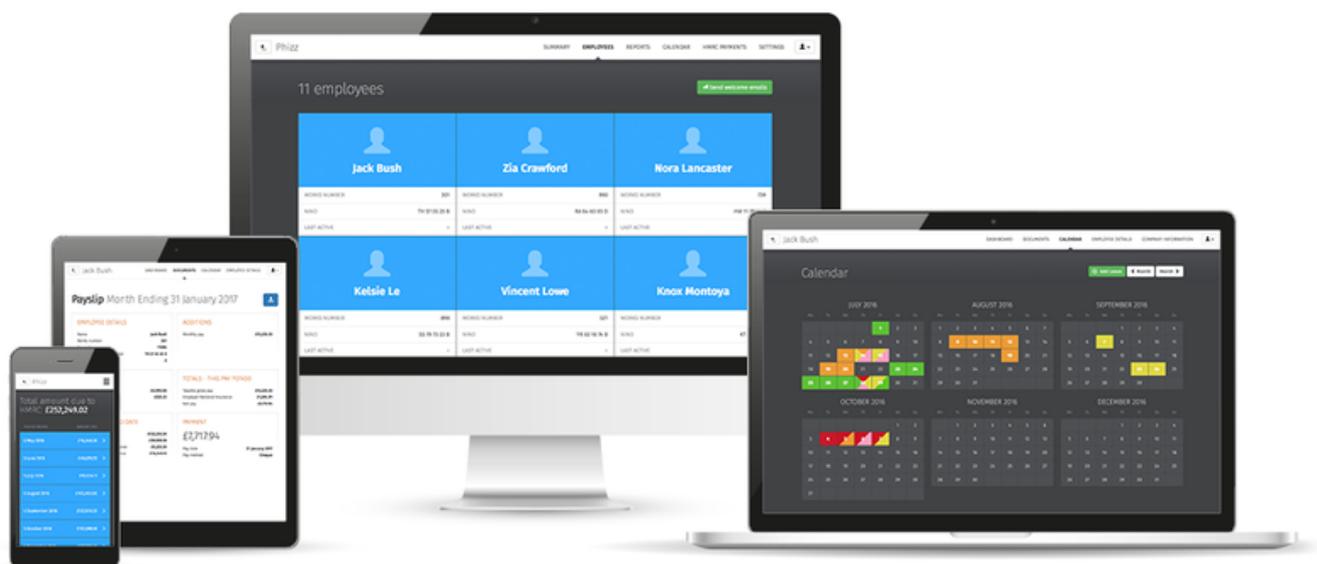




Bright Pay Connect User Guide for Employers

Contents

Signing in	<i>Pages 1 and 2</i>
Employees Section	<i>Page 3</i>
Viewing Employee Documents	<i>Page 4</i>
Employee Calendar	<i>Pages 4 and 5</i>
Reports Section	<i>Pages 5 and 6</i>
Calendar Section	<i>Page 6</i>
HMRC Section	<i>Page 7</i>
Documents Section	<i>Pages 7, 8 and 9</i>



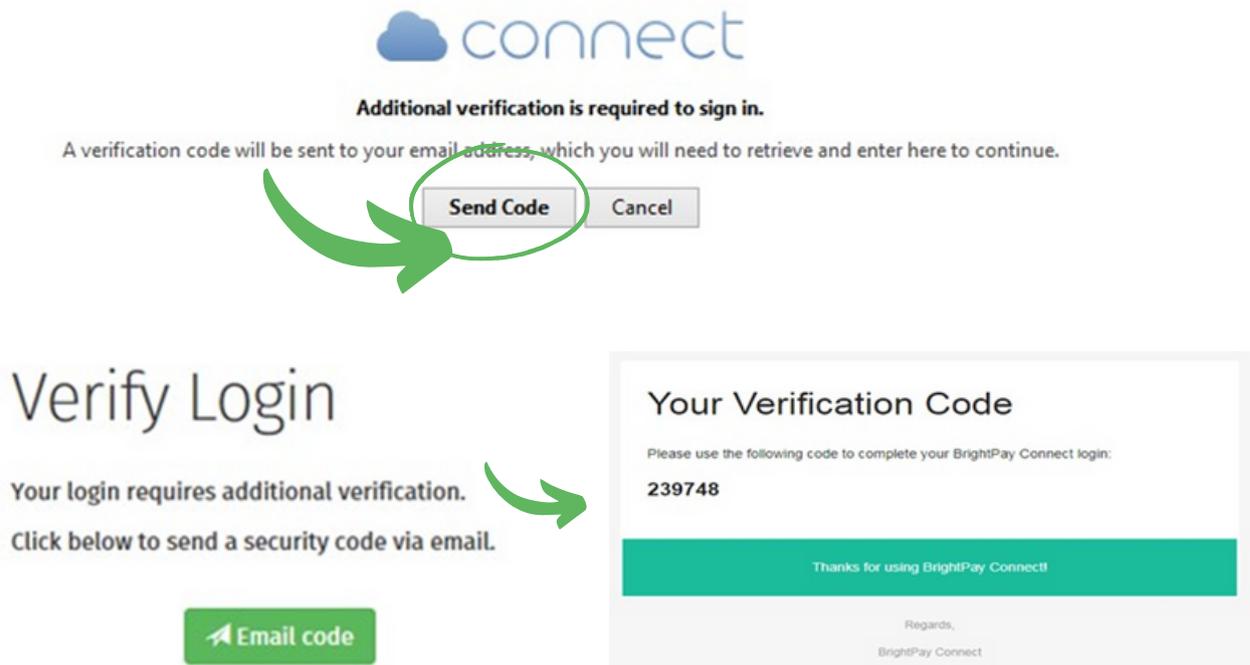
Employer Dashboard

Signing-in

For security, Two Factor Authentication is enabled for employers.

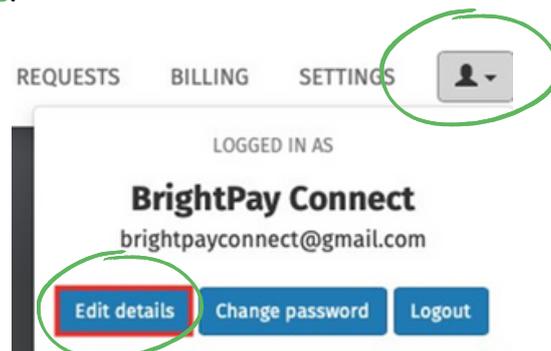
When a user signs into Connect they will be asked to send a security code to their email address that they will need to enter in the code on the login page for the extra security measure.

When they select 'Send Code by email', an email will be sent to the user with a 6-digit numeric code in it.



The user will have to enter the 6- digit numeric code in the **Enter Code field** and select **Verify**. Once the code is verified the user will be logged into their Connect.

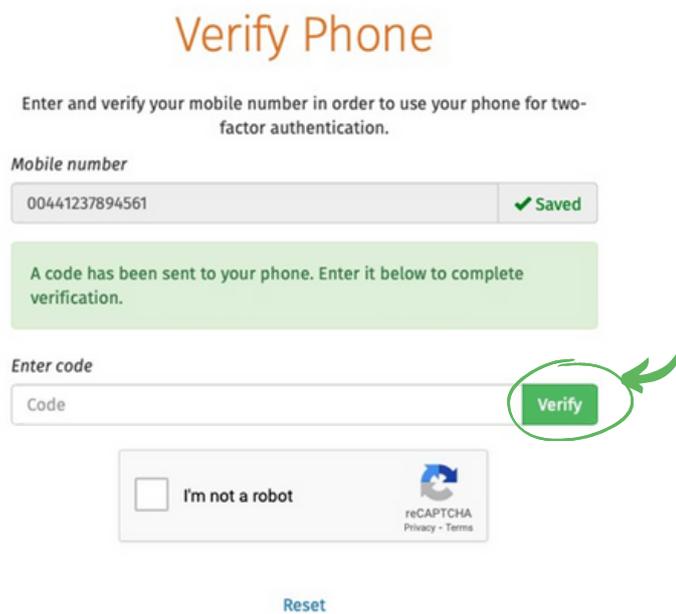
As an alternative method rather than email, there is an option to add a telephone number to a user's profile and have the code sent by text to the user as well as sent by email. When the user is logged into their Connect account, if they select the head icon in the top right hand side and select **Edit Details**.



The user can enter in their mobile number by selecting the option to **Click here**, to verify your mobile number.



The user needs to enter in the mobile number and select **I'm not a robot** and **Save**. A code is now sent to the mobile number in order to verify the mobile number. Enter in the 6-digit numeric code texted to the mobile number in the code field and select **Verify**.



The phone number is successfully verified.



When a user tries to log into Connect now they will see the two options – to **'Send code by email'** or to **'Send code by text'**.

If the user is logging into Connect through an internet browser on the login screen, when enter in the code there is a box for **'Trust this browser'**. The user can select this if they do not want to do the two-factor authentication each time they log into Connect via this internet browser. The browser will remember that this user logged in previously, using two-factor authentication

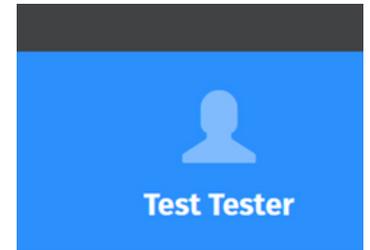
Employer Dashboard - Employees Section



The Employee page shows all your registered employees.

Click on an employee to navigate to their employee dashboard.

Your view of an employee's dashboard largely mimics what that employee will see when they use the employee portal: notifications, their details and calendar.



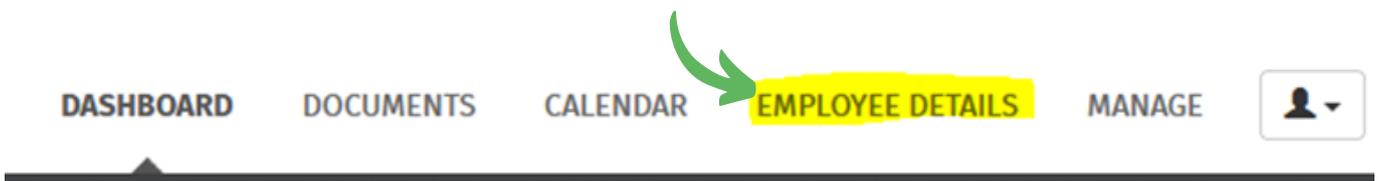
Please note: the '**Last Active**' date that is shown for each employee indicates the most recent time they logged in to **Self Service**, if applicable.

Making Changes to Employee Details

Once in the employee dashboard you can update employee details by clicking on '**update details**'

EMPLOYEE DETAILS	
ADDRESS	1 Park Road, Hampton Wick, Surrey, KT1 4AS, England
EMAIL	-
PHONE	-
NINO	PB340562C
WORKS NUMBER	1
EMPLOYER PAYE REFERENCE	123/456
Update details	

Or you can click in '**Employee Details**' in the top bar.

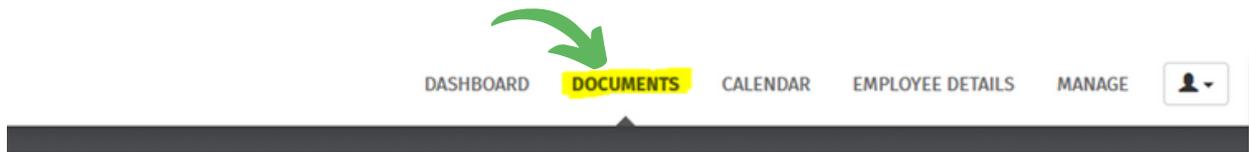


To add or change details, click the '**Change**' button next to each applicable field and enter or update the details as required. Click '**Save Changes**', when completed.

Any changes made here will automatically update the payroll information

Please note: Some important details that must be reported to HMRC such as date of birth, National Insurance number (NINO) and tax code cannot be changed here. For security, sensitive details (e.g. payment bank account information) are not displayed here either. Please contact dhpaysroll direct if any of these details need to be updated.

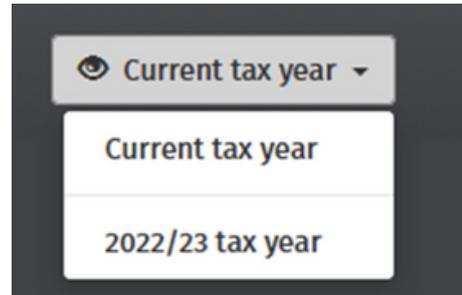
Viewing Employee Documents



Once you have opened an employee record you can select 'Documents' from the top bar menu to access:

- the employee's payslips
- the employee's P60s (if applicable)
- P45 (if applicable)

You can select which tax year you would like to view:



Select the document you wish to view. This will now be previewed on screen.

Click the 'download' button at the top right to save the document to PDF.

Payslip Month 9 (ending 31 December 2023)



Employee Calendar

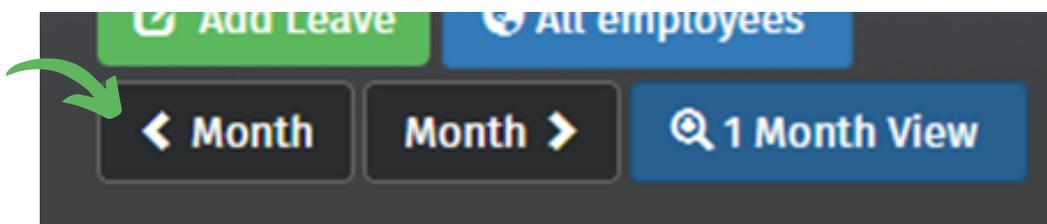
The current month will be displayed on the employee's dashboard, showing any leave that the employee has taken/due to take.



This will provide an overview of the employee's calendar events as follows:



Use the 'back' and 'forward' navigation buttons to move through the year:



To add leave select 'Add Leave' or scroll to the bottom of the page (below calendar)

Add Leave

From	To	Type	Amount
<input type="text" value="26/02/2024"/>	<input type="text" value="26/02/2024"/>	<input type="text" value="Annual Leave"/>	<input type="text" value="7.5 hours"/>
<input type="button" value="Add"/>			
Additional information			
<input type="text"/>			
<input type="button" value="Submit"/>			

Select the Date, Type of Leave, and number of hours. Enter any additional information, if required.

Click 'Submit' or click 'Add Day' to add further leave days.

If leave needs to be corrected, enter the dates and select type 'Cancel Leave Entry' from the drop-down selection

The employee's calendar will be updated and payroll will be notified.

Employer Dashboard - Reports Section



Employer Dashboard

The Reports page will show all your payroll reports. The Payroll Summary report contains all the payroll information (like the current 'wages book').



Accessing Reports

- 1) Simply click on the report you wish to access.
- 2) Select the 'from', 'to' dates and which employees you want to include and click 'Run Report'.

Payroll Summary

From
Month 9 (ending 31/12/2023) ▾

To
Month 9 (ending 31/12/2023) ▾

Employees
Include all applicable employees ▾

Run Report

The report selected will now be displayed on screen.

3) To modify the report, click '**Modify**' and amend the selected dates etc.

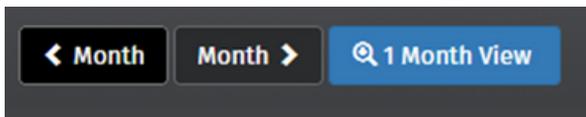
4) To export the report to PDF or CSV, click '**Export**' followed by '**Download as PDF**' or '**Download as CSV**'.



Employee Calendar - Calendar Section

The Calendar page shows the calendar for all employees and all types of leave and is updated when payroll is processed.

Use the '**back**' and '**forward**' navigation buttons to move through the year



Different leave types will be colour coded differently in the calendar:

Overview

This page shows your calendar events, coloured as follows:

■ Annual leave	■ Compassionate Leave
■ Unpaid leave	■ Time Off In Lieu
■ Absence	■ Jury Service
■ Sick leave	■ Medical Absence
■ Parenting leave	■ Training
■ Study Leave	

Dates with multiple types of events are dotted with the relevant colours. To see the breakdown, simply move your mouse over the date.

Or click on a date on the calendar and a dropdown window will show all the leave details.

Employer Dashboard - HMRC Section



The HMRC Payments page displays the payments due to HMRC for the tax year.

Total amount due to HMRC: £5,104.64

PERIOD ENDING	TAX	NIC	AMOUNT PAID	AMOUNT DUE
5 May 2016	£1,254.00	£1,974.20	£3,228.20	£0.00
5 June 2016	£1,203.20	£1,961.30	£3,000.00	£164.50
5 July 2016	£898.60	£1,440.98	£0.00	£2,504.08

1) Click on a payment to view the full P30 (similar to current Monthly Summary), which shows the full breakdown of how the amounts are calculated.

2) Click the 'download' button at the top right to save the P30 to PDF. 

3) To help keep on top of your payments to HMRC, at the bottom of the page you can enter the amount and date paid for each tax period.

ENTER PAYMENT DETAILS

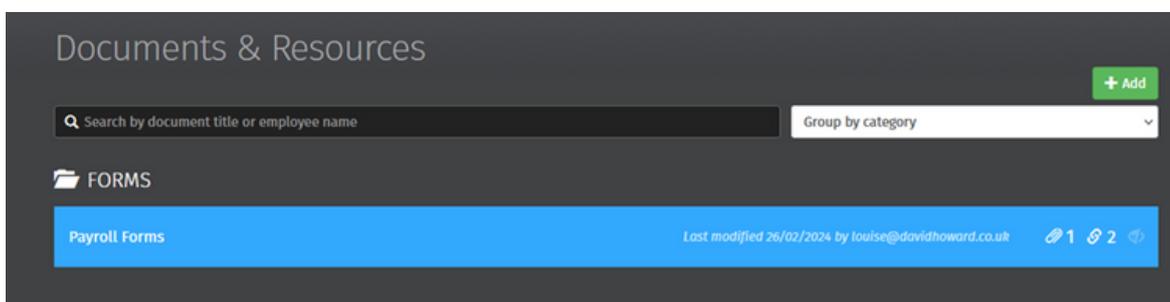
Please enter the total amount paid to date for this tax period.

Amount paid auto-fill Date paid

Employer Dashboard - Documents Section



Here you will find pre-loaded links to timesheet submission and starter forms. If you can't see these on your portal, please let us know so we can add them.



ATTACHMENTS



Starter Form - Non-Managed.docx

Uploaded 26/02/2024 - 76 KB

Upload file...

LINKS



New Starter

<https://www.cognitofrms.com/DavidHowardLtd/passtarterformnonmanaged2>



Monthly Timesheet

<https://www.cognitofrms.com/DavidHowardLtd/timesheet>

Add link...

The **documents** section can also be used to store employee contracts of employment or other information such as training certificates.

All resources that are uploaded can be made available to one or more employees, as required, which employees can then access through their own self-service portal.

Adding a new resource

1) Within Documents, click the green 'Add' button to add a new resource

2a) Under Details, enter the name of the resource you wish to upload and a description, if required.

2b) Select the Category you wish to place the resource under from the drop down menu and choose what Priority it is to have.

Name
Staff Handbook

Description
Company Handbook, updated October 2017.

Category
Company Handbook

Priority
High

Staff Handbook.pdf
Uploaded 02/10/2017 - 294 KB

Upload file...

LINKS
No links have been added.

Add link...

3a) Under **Attachments**, click on **Upload File** and browse to the location of the document you wish to upload.

3b) Select the file in question and click **Open** to complete the upload.

4a) Alternatively to upload a link (e.g. to a website) under **Links**, click **Add Link**.

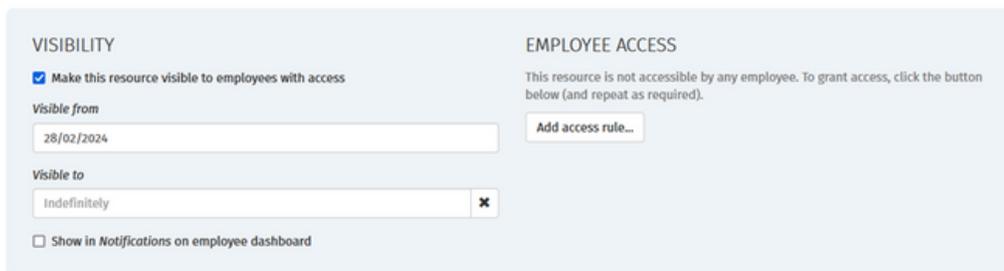
4b) Enter the Label you require and the associated URL. Click **OK**.

5a) Under **Visibility**, tick or untick whether you would like to make this resource visible to employees with access.

5b) If you wish to make the resource visible, enter the date you wish to make the resource visible from and how long you wish it to be visible for.

5c) Tick the field provided if you would like to notify the employee(s) of the document upload on their employee dashboard.

5d) Alternatively, untick to make visible and only the employer will be able to view.



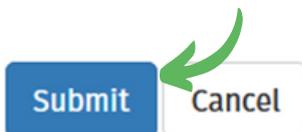
The screenshot shows a settings panel with two main sections: **VISIBILITY** and **EMPLOYEE ACCESS**.
Under **VISIBILITY**, there is a checked checkbox for "Make this resource visible to employees with access". Below it are two input fields: "Visible from" with the date "28/02/2024" and "Visible to" with the value "Indefinitely" and a clear button (X). At the bottom of this section is an unchecked checkbox for "Show in Notifications on employee dashboard".
Under **EMPLOYEE ACCESS**, there is a text description: "This resource is not accessible by any employee. To grant access, click the button below (and repeat as required)." and a button labeled "Add access rule..."

6a) Under **Employee Access**, click **Add access rule...** to grant access to one or more employees.

6b) Select the applicable employee, department or 'all employees' option as per your requirements and click **Add rule**.

6c) Click **Add access rule...** again to grant access to a further employee or department.

7) When ready, click **Submit** to save your settings



The resource will now be added to the **Documents & Resources dashboard**, where it can be accessed at any time.