







Introducing your new payroll portal



Welcome

We're going to show you all the benefits of your new payroll service using our cloud portal application. We're going to take you step-by-step through the process and show you what you can expect from your new, modern, payroll experience.

| | | |
|---|---|-------|
|  | Cloud payroll 10 benefits of a modern payroll service | 2-8 |
|  | The payroll process Introducing your new cloud portal | 9 |
|  | Step-by-step guide What happens next - getting familiar with everything | 10-12 |
|  | Video guide library A selection of short explainer videos | 13 |



You're going to love

Welcome to your new payroll experience.
It's modern, it's simple and it's secure.
Payroll has never been like this before.





10 benefits of cloud payroll

There are many advantages to managing your payroll in the cloud, here are the top ten benefits for your business.

1

Accessibility

Cloud applications are fast, they're easily accessible over any WiFi connection and they enable smart collaboration. We can now offer payroll in the cloud to support a new way to work with our customers.



Your Portal

2

Secure data

Working collaboratively on a cloud-based platform has many data security benefits as modern cloud platforms come with security 'baked-in'. With everything managed online, via secure portals, companies are no longer exposed to the risks that are inherent with uploading and downloading data.



3

User friendly interface

Our payroll portal is easy to use and easy to navigate. It looks and works like most other apps that you're used to using on a daily basis. You can access your portal via your phone, tablet, laptop or desktop any time and from any location where there is a WiFi connection.





@John can you send us your payroll changes for this month?



@Katie I've added everyone's hours now, thanks

4

Messaging area

There's a messaging centre in your cloud portal, so that you can leave messages and instructions for our bureau team, the way you would send an SMS or WhatsApp message. You can also upload files and images and everything gets stored

Great, thanks
@John, we'll run payroll now





Payroll approved!



Running Payroll

5

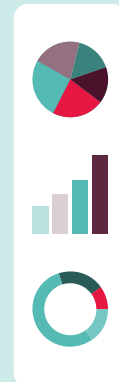
Step-by-step process

Our new cloud portal has a built-in payroll process management guide that tracks and manages processing deadlines from the data gathering stage, all the way through to running payroll and paying your team.

6

Online access to reports

It's easy to view all of your payroll reports online, there's no need to download them. Unless you want to of course and then that's easy too!





7

Email reminders

Get gentle nudges and reminders for your payroll processing deadlines. Timely email reminders help everyone stay on track, which helps to reduce payroll errors due to the last minute rush.

8

Payroll data archive

Our cloud platform includes a full audit trail of every action and activity related to each payroll processed, which gets stored with every completed payroll. This keeps everything in one place for easy access to saved information, if you need it later.





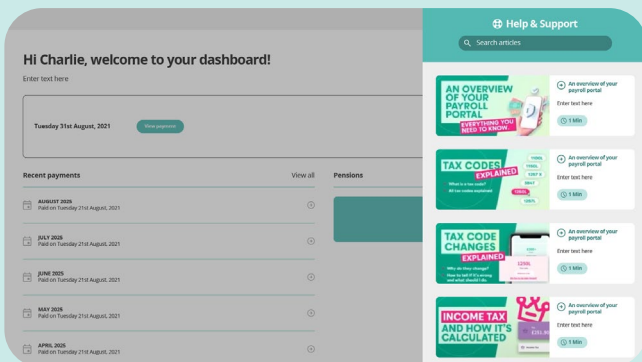
Employee portal

Every employee gets their own portal, which is unique to them and goes with them wherever they go, even if they leave your company. Employees can access their portal from any device, 24/7 x 365 days a year and it stores all of their payslip documents and other payroll and pension related documents. There's also an online payslip and handy stats to provide top level pay info at a glance.



Employee FAQs

The employee portal also comes complete with answers to questions around pay changes and tax code changes along with tips and advice when contacting HMRC. This helps people to understand their pay and, in turn, reduces the queries you might get from them.



The Payroll Process



Introducing your new cloud portal

Your new cloud portal is your company's own unique place to send and receive all of your sensitive payroll data. The steps below show you four simplified steps of the payroll process and how you can use your portal during each step.

1

Use your portal to send us your payroll data by your usual deadline. You can add instructions for us and you can also upload files and documents directly to your portal.

2

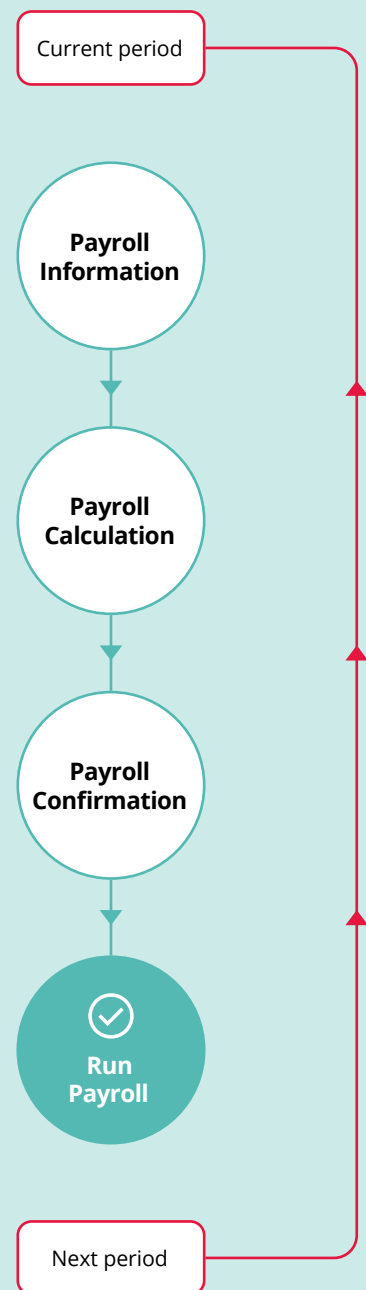
We will process your payroll and create draft reports for you. These will be in your portal waiting for you and we will send you a notification when they are ready to let you know that they're there.

3

Once you've reviewed your payroll calculations and reports, you can let us know whether you're happy with everything or if you want to make some revisions. You can do all of this directly in your portal.

4

When you've confirmed that everything is correct, we will finalise your payroll and perform all of the usual tasks and activities. We will let you know when everything is complete so that you can go to your portal to access all of your final payroll information.



Step-by-Step guide

Here's a guided tour of your new payroll portal, with explanations and videos, so that you can start to get acquainted with your new environment. You can familiarise yourself with your portal's features and also with your employee's portal experience too.

Your payroll on Paycircle

1

Registering for your portal

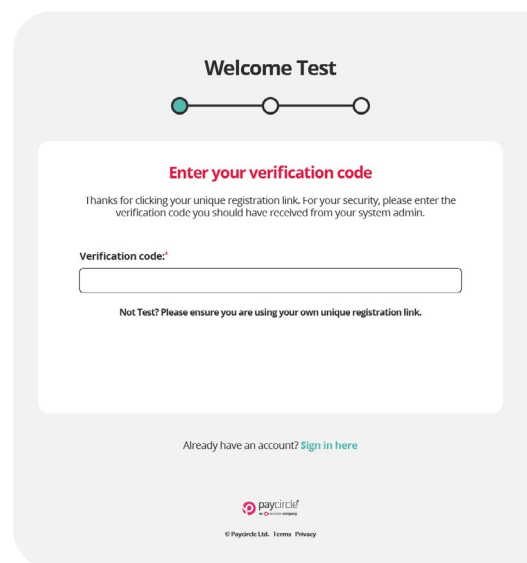
Once your company's payroll data has been fully migrated to our new cloud platform, you will be sent an invitation to register for your own 'Employer Payroll Portal'.

[Registering for the Employer Payroll Portal](#)

For new users to the Payslip Portal

[Existing Employer Payroll Portal User](#)

You will be prompted to log in using Access Identity and create an account if you don't already have one.



2

Finding your way around

Once you've registered you will be able to take a look around your portal and familiarise yourself with what's there.

[Watch the video to look around your portal](#)

3

Adding Notes and @mentions

When you want to let us know what changes you're making to your payroll, you're probably used to sending an email or making a phone call.

You can now use your payroll portal to give us your instructions. This is a much more secure way of sharing sensitive information about your employees. It also keeps everything in one place, which has the added benefit of reducing errors as everyone has a clear picture of what's happening.

It's really easy to leave notes and instructions, it's a bit like using text messages or WhatsApp. Watch the video to see how leave instructions and make changes

[Watch the video to see how leave instructions and make changes](#)

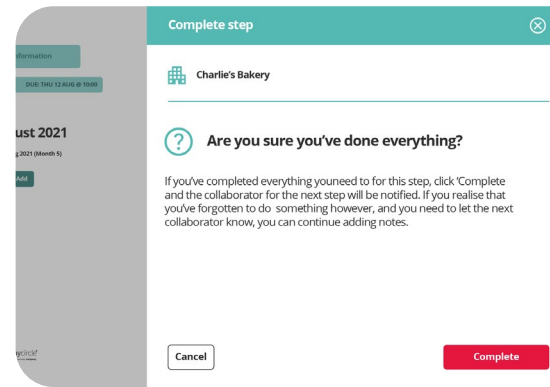
4

Your activities

We will have set up your payroll with certain dates and deadlines to enable us to keep track of your company's payroll process and make sure that everything happens on time. There will be some activities for you to do too.

These activities include things like making sure that you've given us all the information and instructions relating to payroll by a certain deadline. You will also need to sign off on the draft payroll calculation and authorise payroll by specific dates in order to run the payroll on time.

[Watch the video to see activities and deadlines](#)

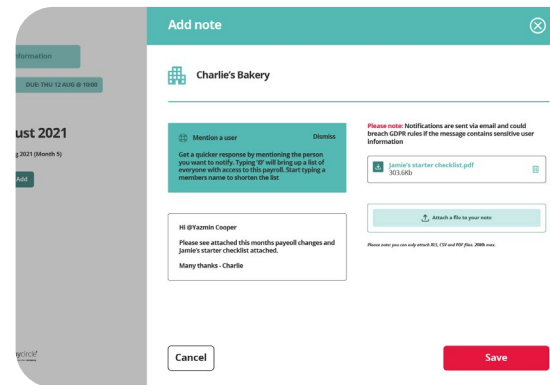


5

Uploading documents and files

If you want to upload spreadsheets, documents or images of any kind, instead of attaching them to an email or logging into a separate portal, you can upload them directly to your own payroll portal, where our bureau team can access them directly. Again, this is much quicker and definitely more secure than using email or a separate portal.

[Watch the video to see how to upload files](#)



6

Adding changes via the 'Changes Table'

In some cases, we will give companies access to a 'Changes Table' designed especially for your company. This table will include a list of your employees and it will also include the types of changes that you regularly make to your payroll - like overtime and expenses etc.

This is for you to complete instead of uploading a spreadsheet or writing everything down in a note for our bureau team. It's a personal preference and we can decide whether it's something your company would like to use.

[Watch this video to see how the changes table works](#)

7

Accessing and downloading draft reports

Once we have collected all of your payroll data and have performed all of the calculations and compliance checks, we will prepare your draft payroll along with your draft reports for you to review and either sign off on or make further changes to.

[Watch this video to see how to access your draft reports](#)

8

Approving your payroll

Sometimes you will be able to confirm your payroll after the first draft and sometimes it might take more than one loop through the process. Once you're ready you can confirm that everything is correct and give your authorisation to finalise your payroll and make the relevant submissions to HMRC and your pension provider, if you have a workplace pension.

[Watch this video to see how to approve your payroll](#)

9

Accessing your final reports

Once everything is complete and all of your submissions have been made, you can access your finalised payroll reports. Here you can see how much you need to pay your team and other payroll related costs such as HMRC and your workplace pension provider, if you have a workplace pension.

[Watch this video to see how to access your finalised payroll reports](#)

That's all there is to using your payroll portal to work with us, securely and collaboratively. The next thing that happens is that your employees will get notified that their payslip is ready and waiting for them in their portal.

[Here's what your employee's will see when they log into their Paycircle portal](#)

[And here's a quick preview of what the employee registration process looks like](#)

[And if anyone forgets their log in details, here's what the process to reset passwords looks like](#)

If you want to let your employee's know a bit in advance that there's a new portal for them to access their payslips, There is an 'employee welcome pack' which can be requested and we would be happy to send you.

Managed Demo Ltd

July 2024 £33,376.09 total cost

June 2024

Pay day: 28 Jul 2024 (Month 4)

[Add](#) [Payslips](#) [Reports](#)

| | | |
|---|--|--|
| Salaries £22,182.77 <small>Pay day 28 Jul 2024</small> | HMRC £9,398.76 <small>Due on Aug 2024</small> | Workplace pension £1,794.56 <small>Paid by Direct Debit</small> |
|---|--|--|

WARNING: These are draft reports. Please do not pay your team or HMRC using the data in these reports.

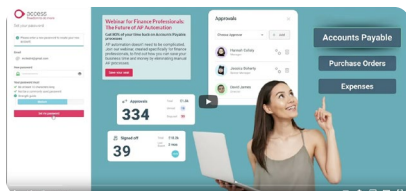
| | |
|-----------------------------------|-------------------------------|
| Paycircle Detailed Journal Report | Paycircle Detailed P22 Report |
| Paycircle Journal Report | Paycircle P22 Report |
| Paycircle Payroll Report | Paycircle Pension Report |
| Standard Payroll Summary Report | Standard Pension Report |



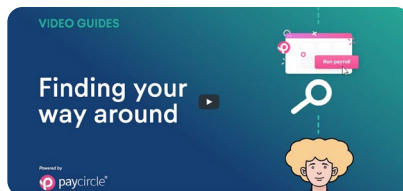


Video guide library

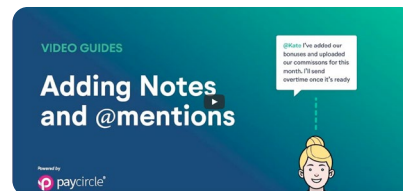
Here is a library of all of the video guides in the previous section. These videos are also available in your payroll portal so that you can refresh your memory any time.



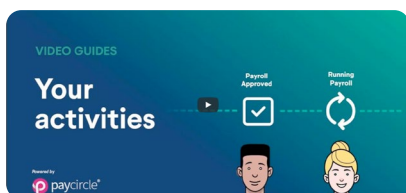
[Registering for your portal](#)



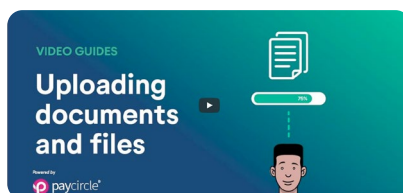
[Finding your way around](#)



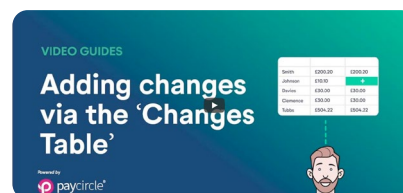
[Adding Notes and @mentions](#)



[Your activities](#)



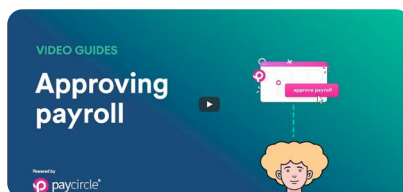
[Uploading documents and files](#)



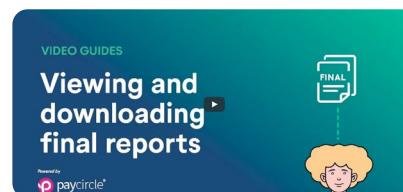
[Adding changes via the 'Changes Table'](#)



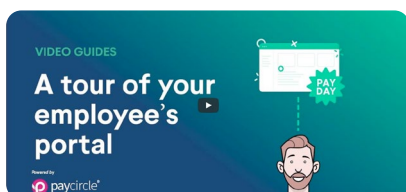
[Accessing and downloading draft reports](#)



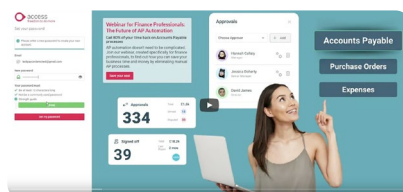
[Approving your payroll](#)



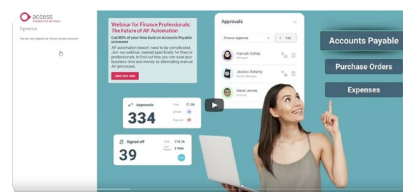
[Accessing your final reports](#)



[A tour of your employee's portal](#)



[Resetting forgotten passwords](#)



[Changing your Password](#)



