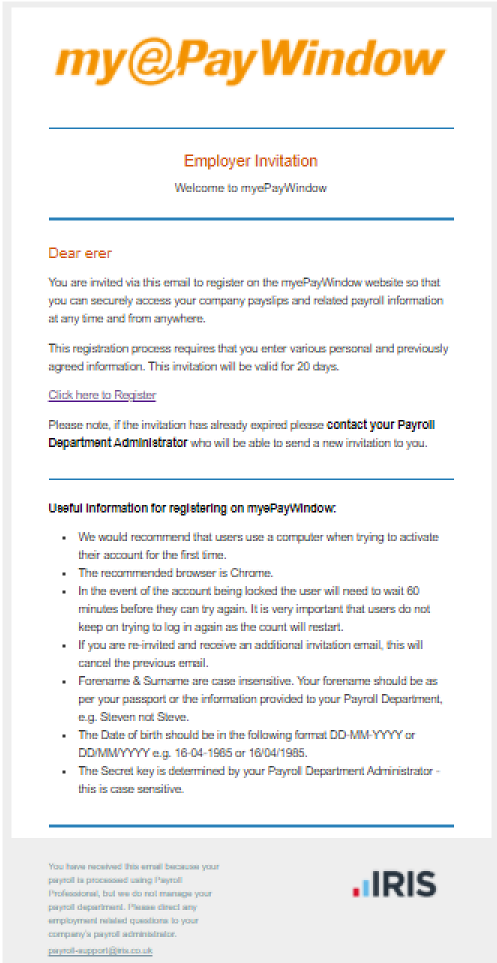
my@PayWindow

Portal Employer User Guide

Employer Registration

Once you, as an Employer user, have been connected and invited to the Portal from the Payroll Professional application; you will receive an email invitation with a 'link' that will take you to the Portal website to start registration. The invitation link within the email is valid for 20 days.


my@PayWindow

Employer Invitation

Welcome to myePayWindow

Dear erer

You are invited via this email to register on the myePayWindow website so that you can securely access your company payslips and related payroll information at any time and from anywhere.

This registration process requires that you enter various personal and previously agreed information. This invitation will be valid for 20 days.

Click here to Register

Please note, if the invitation has already expired please **contact your Payroll Department Administrator** who will be able to send a new invitation to you.

Useful information for registering on myePayWindow:

- We would recommend that users use a computer when trying to activate their account for the first time.
- The recommended browser is Chrome.
- In the event of the account being locked the user will need to wait 60 minutes before they can try again. It is very important that users do not keep on trying to log in again as the count will restart.
- If you are re-invited and receive an additional invitation email, this will cancel the previous email.
- Forename & Surname are case insensitive. Your forename should be as per your passport or the information provided to your Payroll Department, e.g. Steven not Steve.
- The Date of birth should be in the following format DD-MM-YYYY or DD/MM/YYYY e.g. 16-04-1985 or 16/04/1985.
- The Secret key is determined by your Payroll Department Administrator - this is case sensitive.

You have received this email because your payroll is processed using Payroll Professional, but we do not manage your payroll department. Please direct any employment related questions to your company's payroll administrator.
payroll-support@iris.co.uk

IRIS

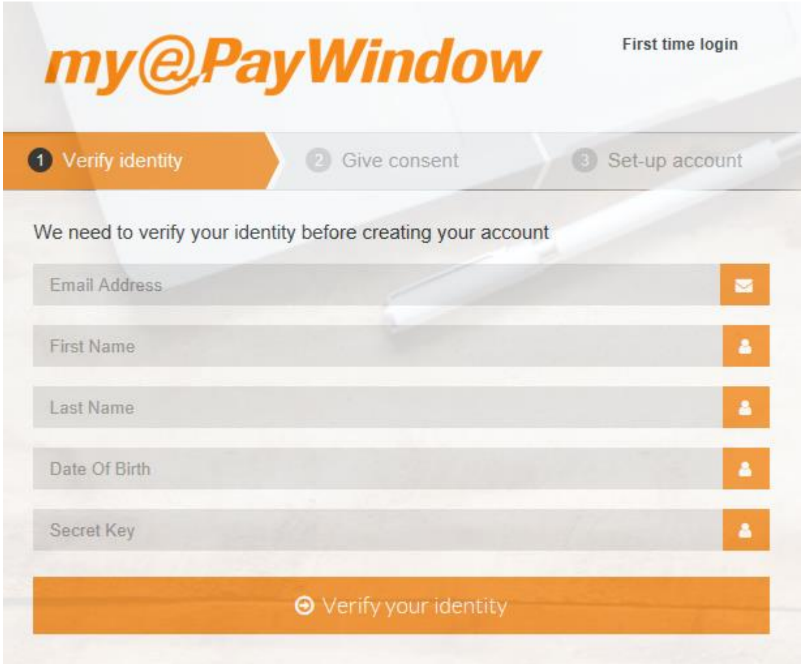
Note: The <u>text in the invitation email differs slightly between Employer users and Employee users</u> in that Employees are advised to have a previous payslip to hand when they go through the registration process as they will require their NI number to verify their identity (or passport number if they don't have an NI Number). We do not explicitly state the requirement for an NI number in the email for security reasons and Employees who do not have an NI number should be individually pre-warned of this registration requirement. Employer users registering will need to have prior knowledge of a 'secret' keyword pre-agreed with the Payroll department (see step 1 below)

Registration Step 1 – Verify Identity

The first step of registration is to verify that you are genuine. The details on this screen (see below) need to match your details set up in the Payroll software. All fields must be entered correctly to verify your identity and for the registration process to continue to step 2.

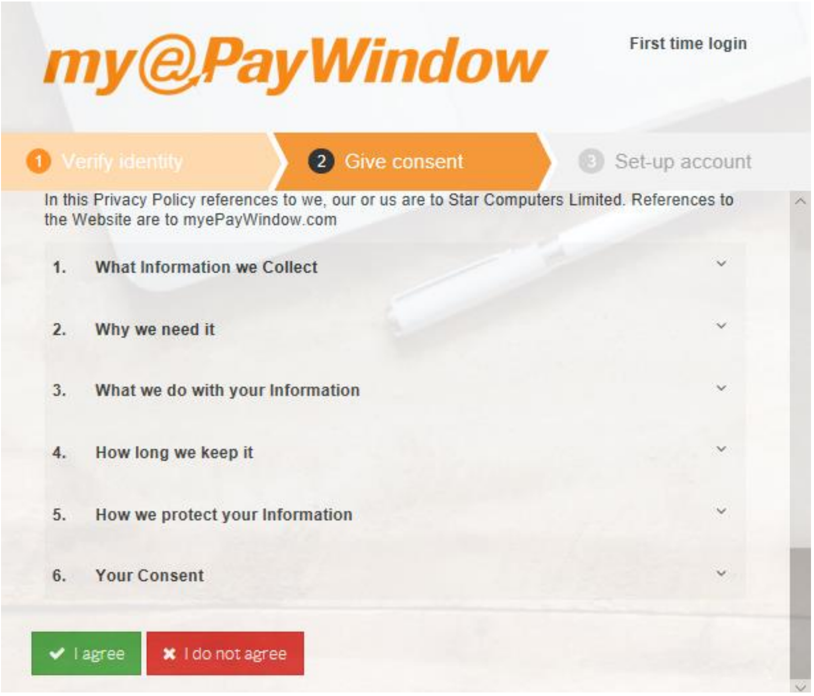
Note: First Name is as per the Payroll Employer or Employee record. If you have more than one name in this field, any one of the names can be entered. For example, if you are known as 'John James' either John or James can be entered in the First Name entry field.

Note: Secret key is a word you have agreed with your Payroll department, for example this could be a pre-existing report password.



Registration Step 2 – Give consent

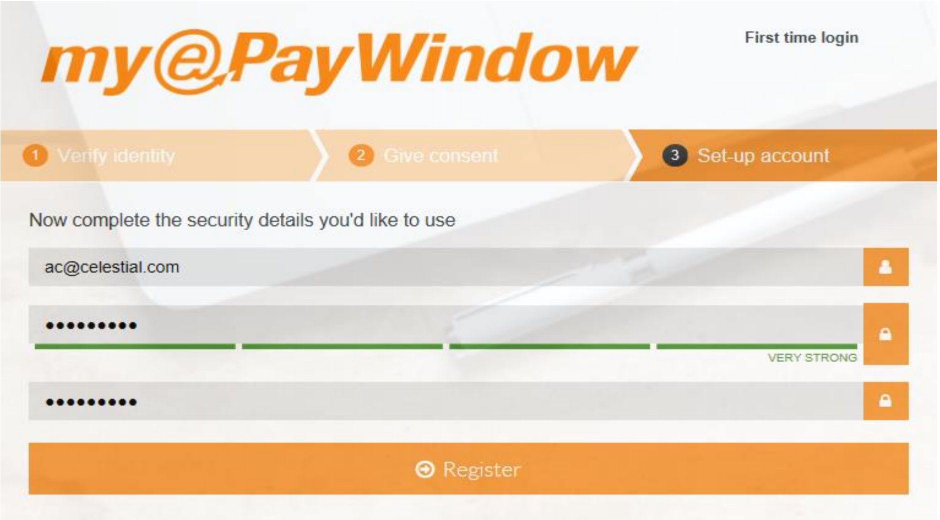
On completing Step 1 successfully, the registration process moves to Step 2, consent. By scrolling to the foot of the **Give consent** window and clicking the **'I agree'** button, the registration process moves to step 3.



Registration Step 3 – Set-up account

This step involves you setting up your Portal username and password:

- Username – minimum 6 characters – maximum 64 characters, an email address can be used if this more easily remembered. Password – minimum 8 characters – maximum 40, 1 upper case, 1 lower case, 1 special, 1 numeric. Note: an existing ePayslips password can also be used.

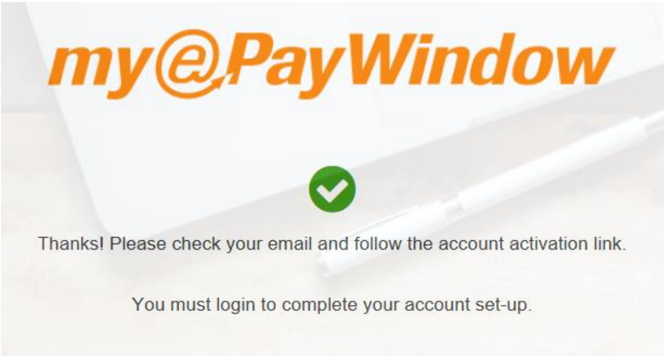


Note: A special character is a punctuation type character from your keyboard such as (!,?, %, =, *)

The password strength for any entered password is shown dynamically on screen, the password strength indicator will only change to green and very strong, when you have entered a password meeting the criteria.

The password will need to be entered a second time to verify it and you will not be able to register until they match.

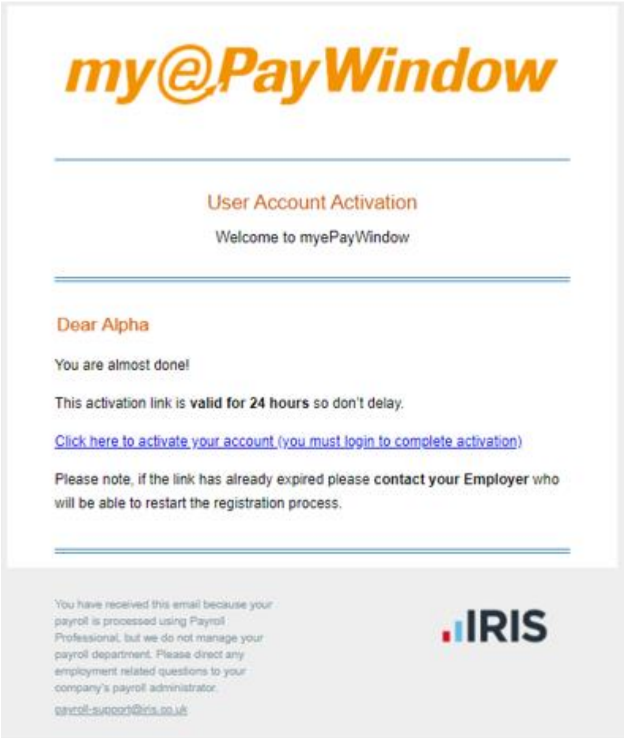
On clicking the **Register** button, the following message is displayed. You will then receive an email to activate your user account, so the full registration process is <u>not yet complete</u>.



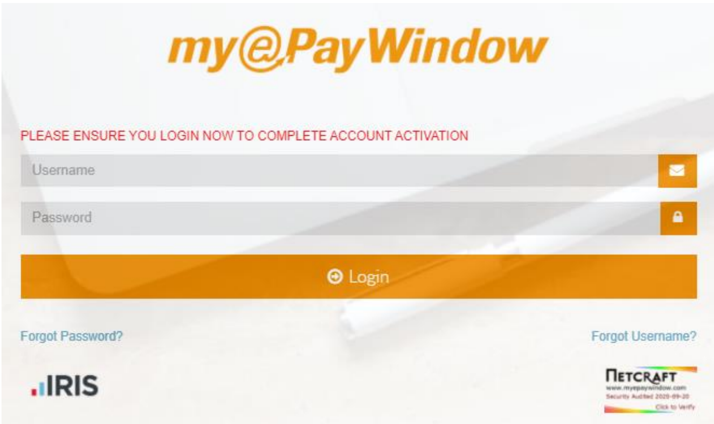
Registration Step 4 - Activate account

The final step in registration involves clicking the activation link in the email sent to you in Step 3, and then successfully logging in to the Portal.

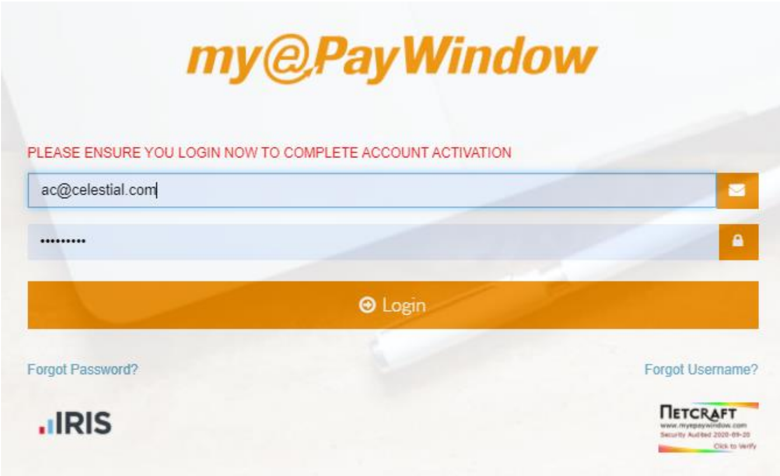
Warning – If the activation link is not used within 24 hours then the registration process will need to be re-started from the link in the initial invitation email if it is within 20 days. If more than 20 days have passed you will need to ask to be re-invited by your Payroll Department.



On clicking the activation link you will be automatically directed to the login screen on the Portal where you must login to complete registration.



Enter the login details created during step 3 and click 'login', this will complete the registration process.



Additional authentication – 2SA/2FA

2 forms of optional user security authentication can be used in addition to the standard username and password:

- 2 Step authentication 2SA – Requires a user to set-up a memorable word from which they will be required to enter 2 random characters from this word each time they log-in to gain access to their account.
- 2 Factor Authentication 2FA – Requires a smartphone 'Authenticator App' (Google / MS /Authy/andOTP are some examples) Each time a user logs-in they will additionally need to enter a code generated by the authenticator app to gain access to their account.

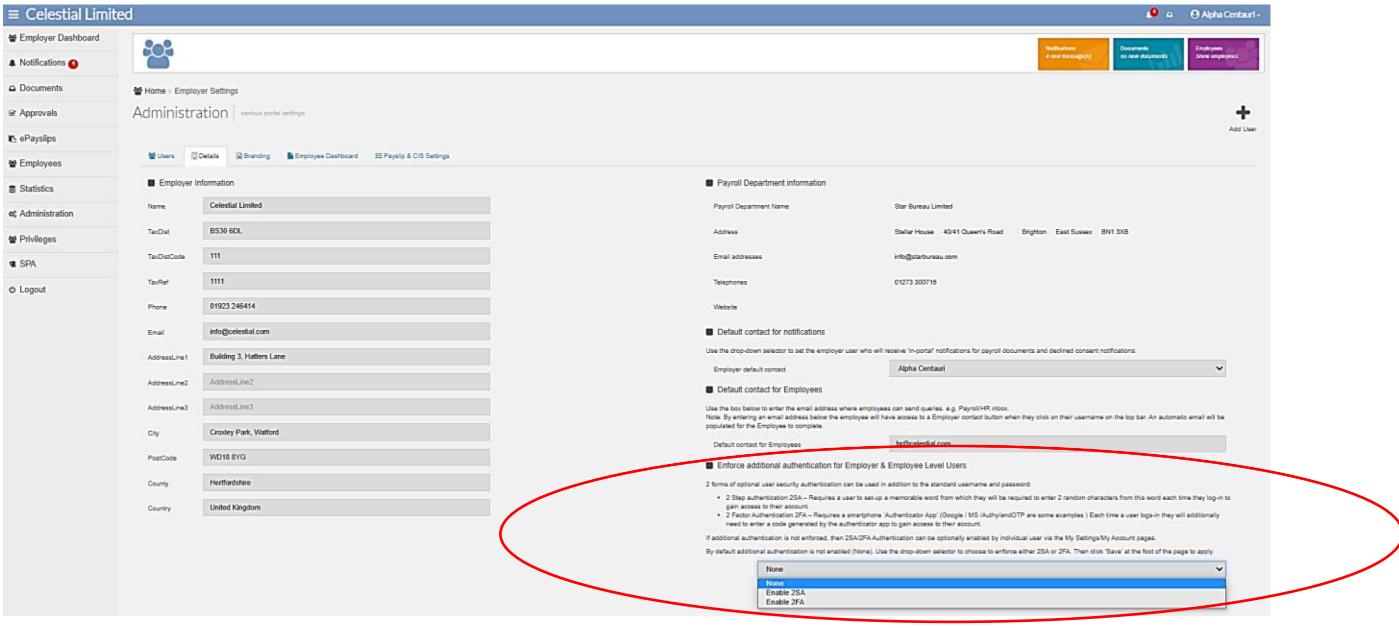
If additional authentication is not enforced, then 2SA/2FA Authentication can be optionally enabled by individual user via the My Settings/My Account pages.

By default, additional authentication is not enabled (None). Use the drop-down selector to choose to enforce either 2SA or 2FA. Then click 'Save' at the foot of the page to apply.

2 Step Authentication

If 2SA is enforced for your users, the user will be asked to create a memorable word. The Memorable word can only contain letters and digits and be between 6 and 12 characters in length

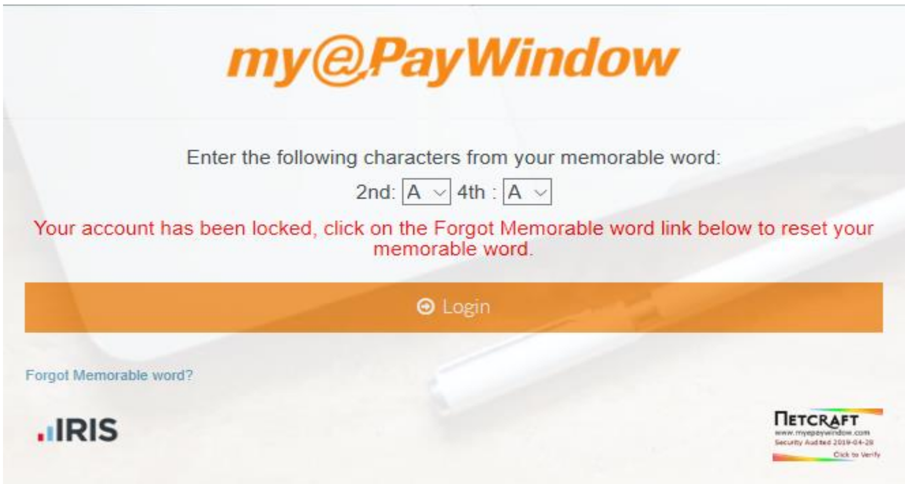
Clicking 'Submit' saves the memorable word to your user account



Once a username and password are entered a second page is displayed where the user must enter two random characters from their memorable word.

A message is displayed if incorrect characters are entered.

After 3 incorrect attempts the account will be locked.

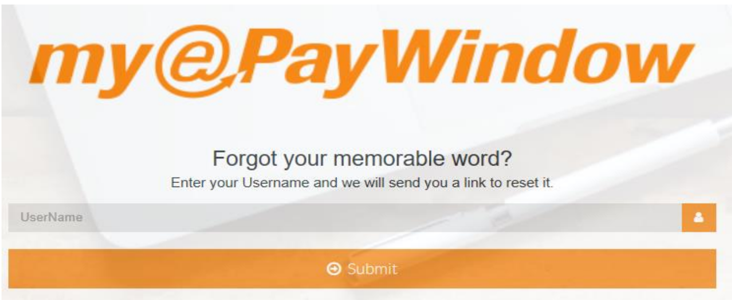


If the account is locked the user will need to wait an hour to re-enter the 2 characters from the memorable word or contact their Payroll department/Employer to unlock the account.

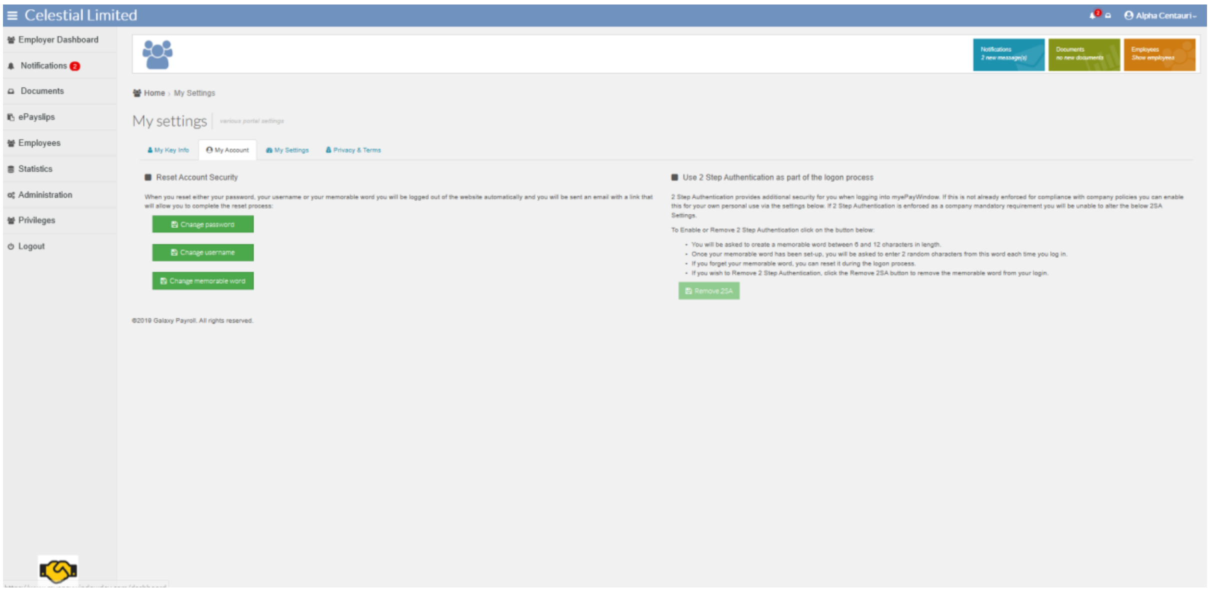
Forgot Memorable word reset during login

To reset the memorable word, click the 'Forgot Memorable Word' link

Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the memorable word and gain access to their account



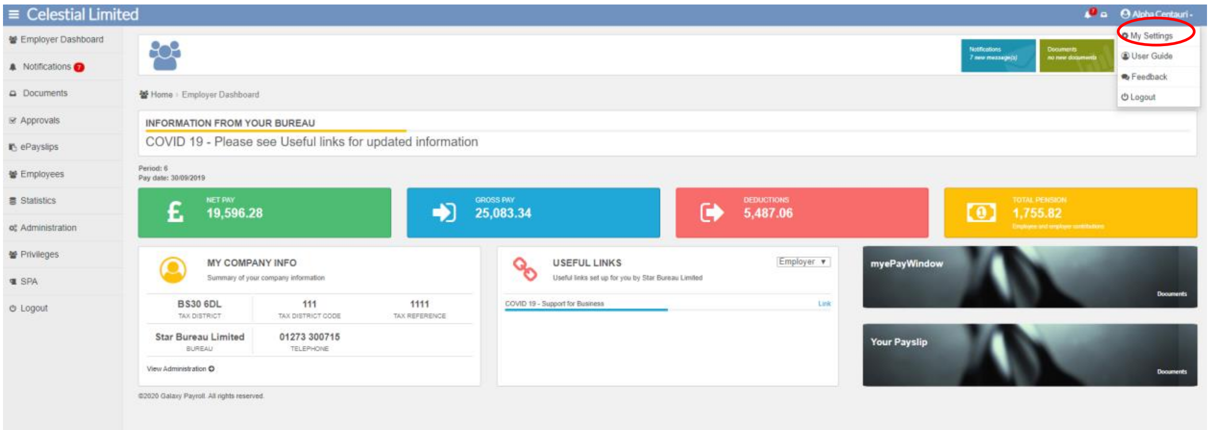
As 2SA has been enforced at company level the User will be unable to edit personal settings under My Settings/ My Account.



Individual User 2SA Activation

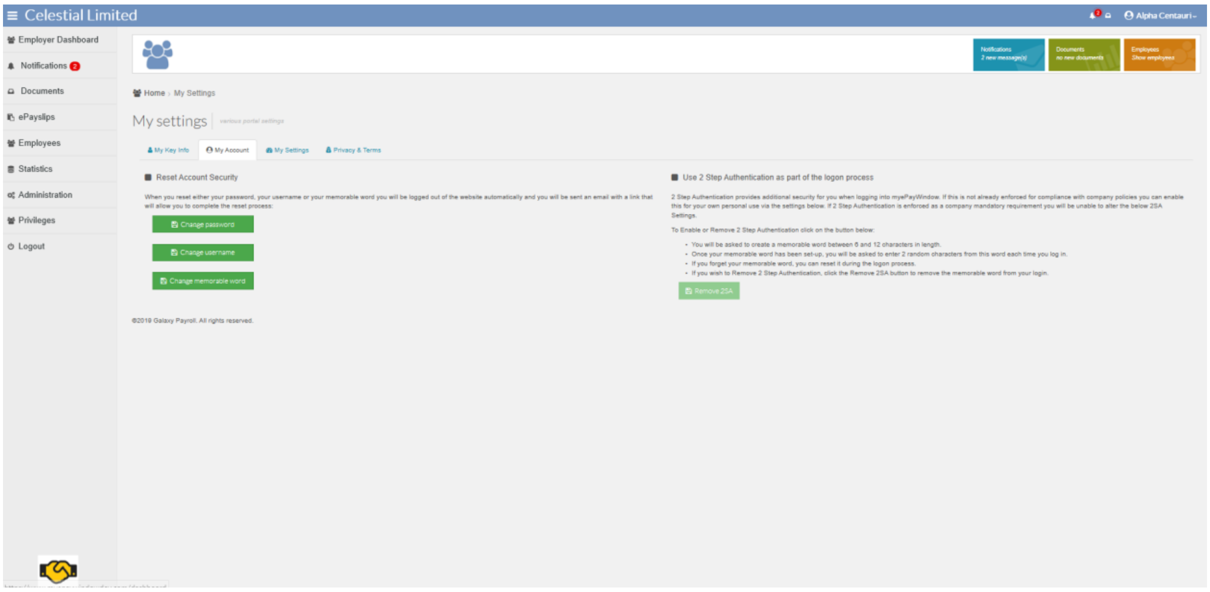
An individual can Enable 2 Step Authentication for their myePayWindow account provided that 2SA hasn't been enforced via Administration at Employer/Payroll department Level.

From the Top-bar click on the user name and My Settings.

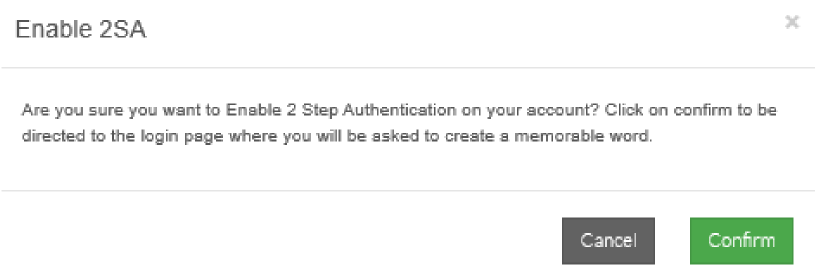


On the My Account tab, click the Enable 2SA button.

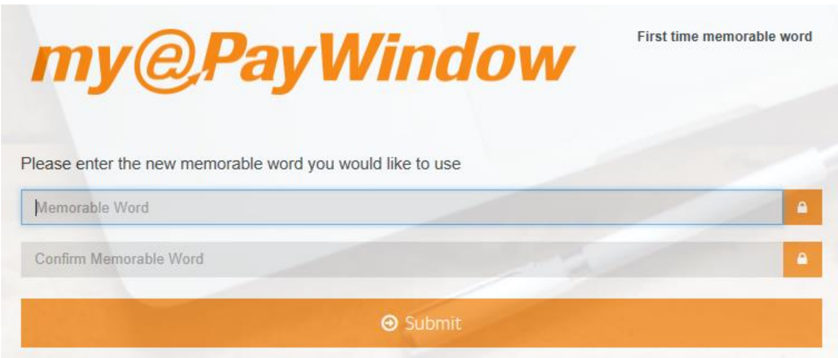
If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.



Click the confirm button to set-up your memorable word.

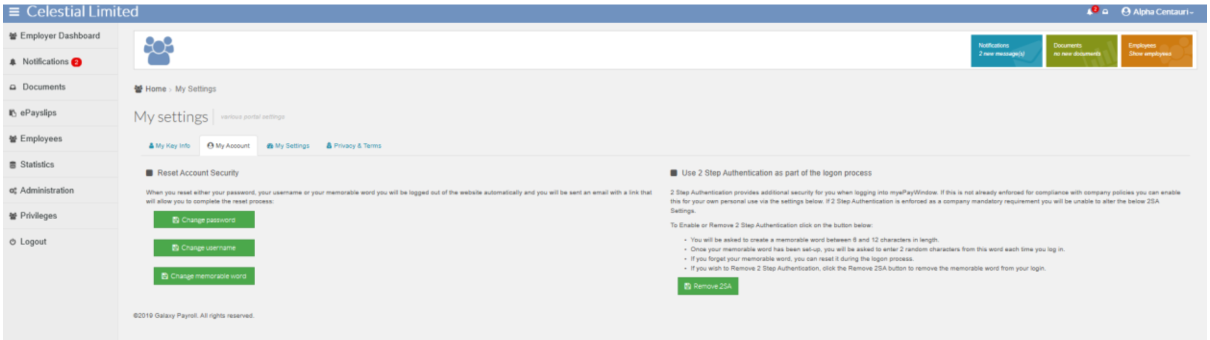


Users will be next asked to enter their username & password, after which they can 'set-up' the memorable word. The Memorable word can only contain letters and digits and be between 6 and 12 characters in length.

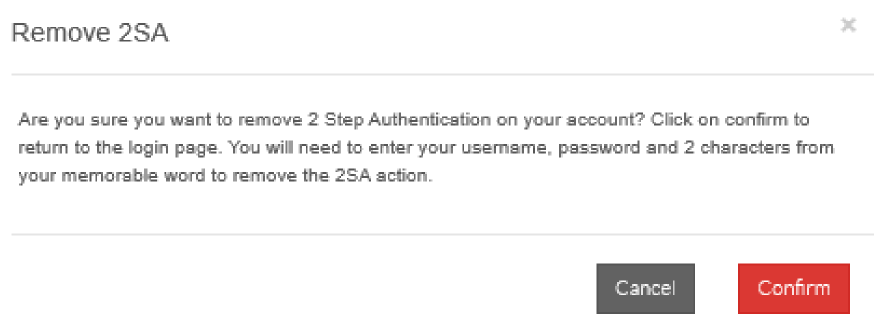


If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.

If 2SA is not enforced, a user can Remove 2SA from their account via My Settings/My Account and the Remove 2SA button.



Once a user has confirmed this action, they will be directed to the login page.

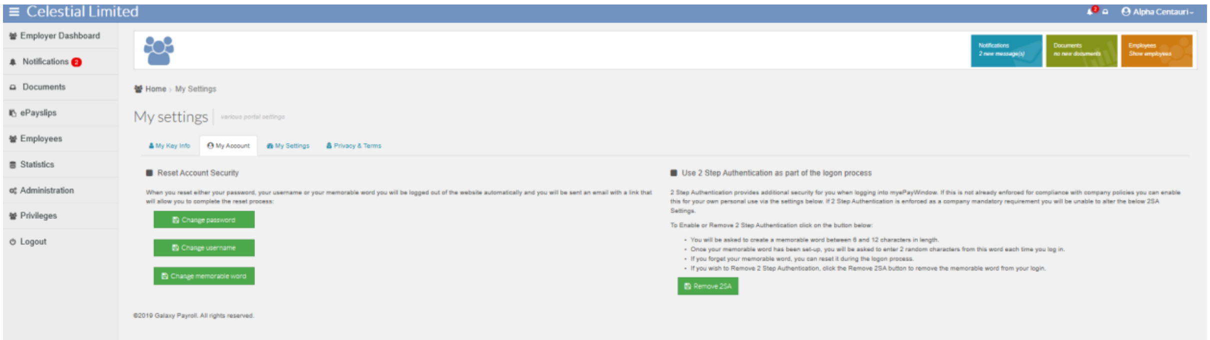


Enter the Username, Password and 2 characters from your memorable word to confirm the remove 2SA action.

Forgot Memorable word reset during login

To reset the memorable word, click the 'Forgot Memorable Word' link

Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the memorable word and gain access to their account



2 Factor Authentication

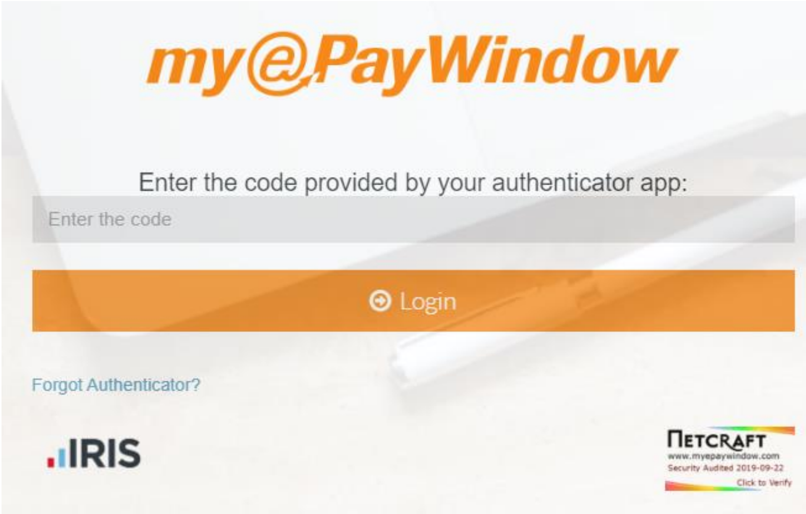
If 2FA is enforced for your users, the user will be asked to scan/enter a QR code,

Ensure you have your "authenticator app" installed on your smartphone.

Scan the code or enter manually to access your account.

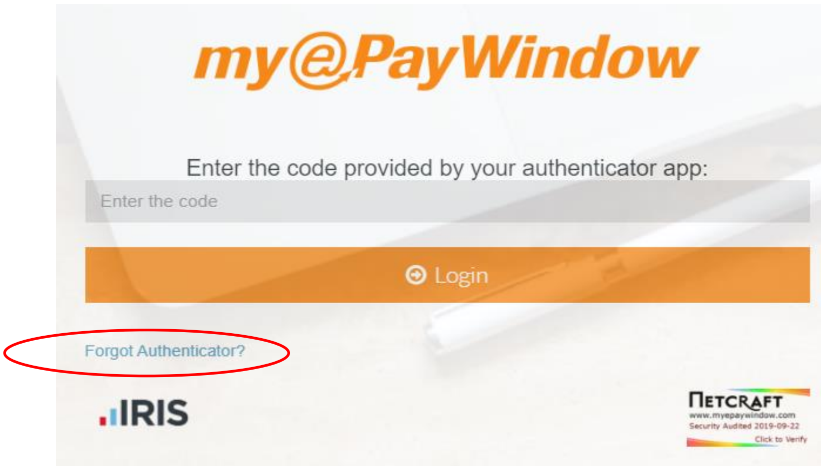
Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.



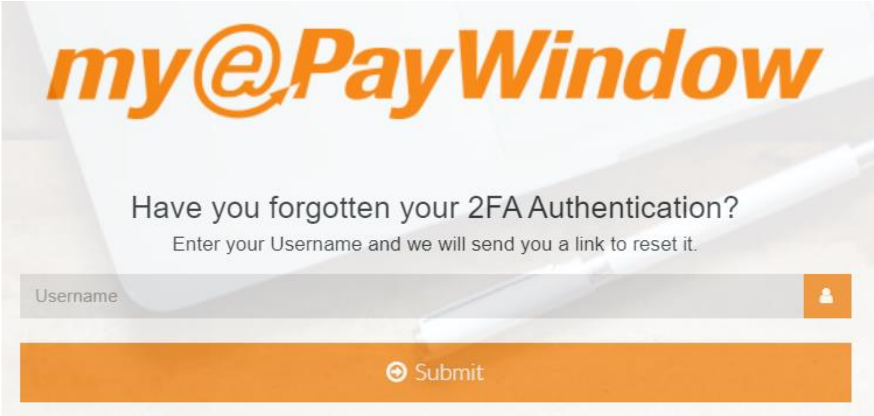
If the account is locked the user will need to wait an hour to re-enter or contact their Payroll Department/Employer to unlock the account.

Forgot Authenticator - reset during login

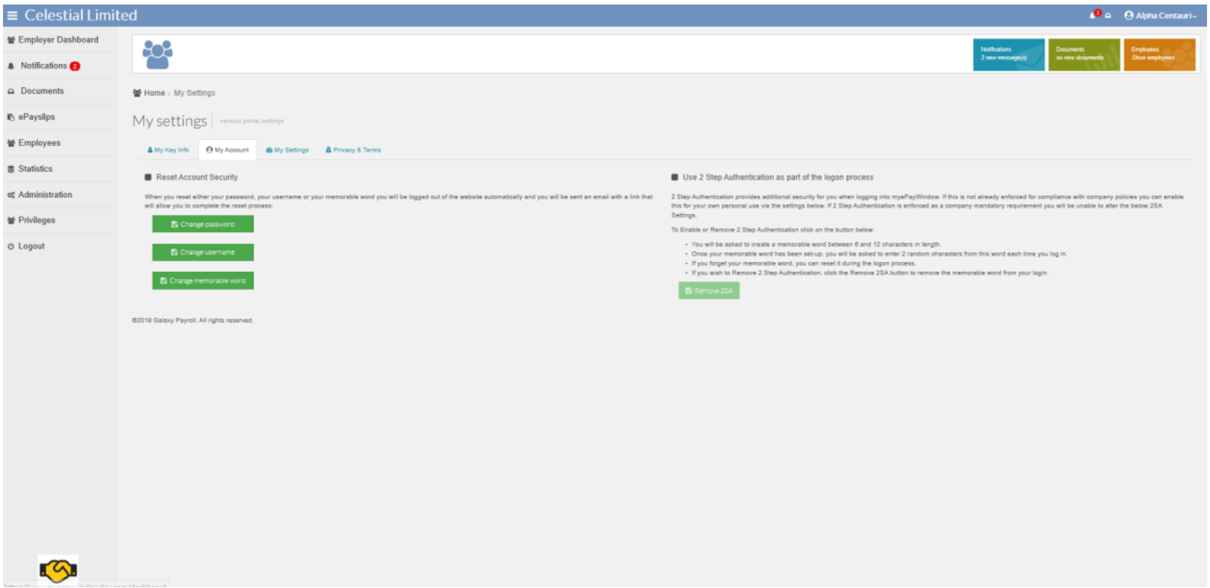


Click on forgot authenticator?

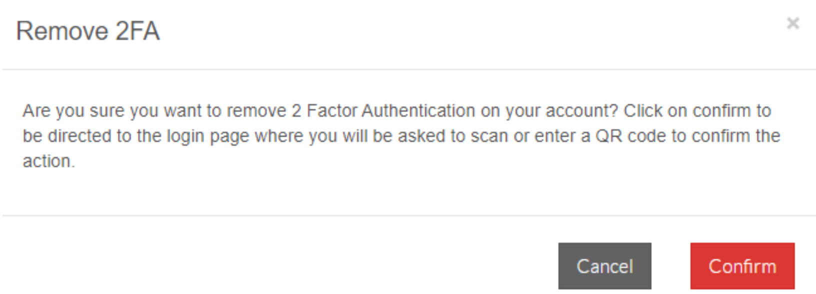
Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the authenticator and gain access to their account



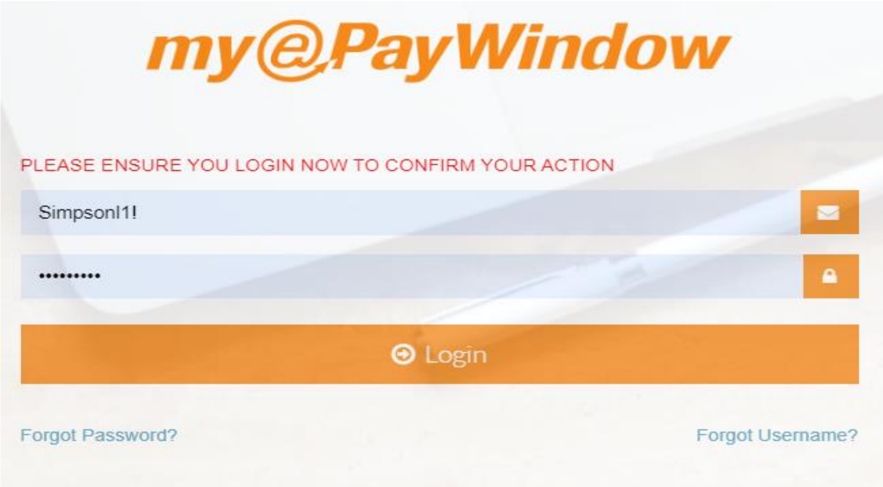
If 2FA is not enforced, a user can Remove 2FA from their account via My Settings/My Account and the Remove 2FA button.



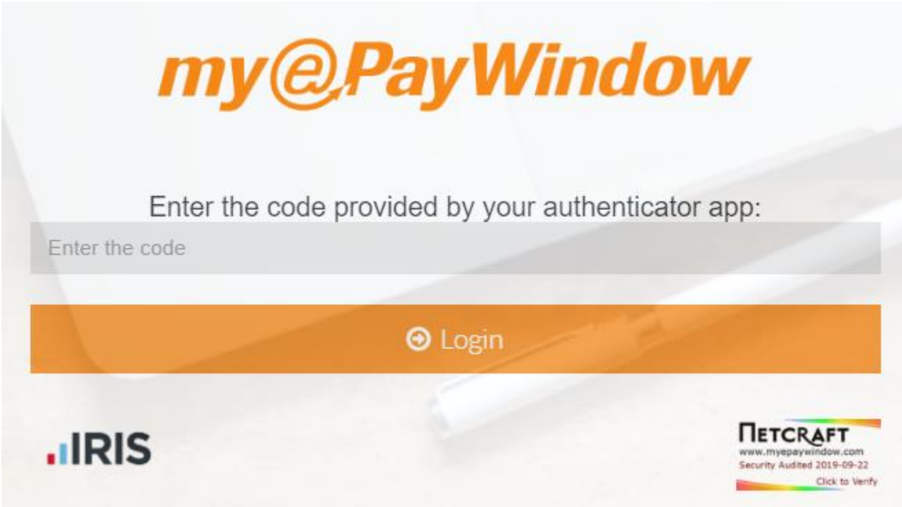
Once a user has confirmed this action, they will be directed to the login page.



Enter the Username and Password



Enter the code provided from the authenticator app to confirm the removal of 2FA



Individual User 2FA Activation

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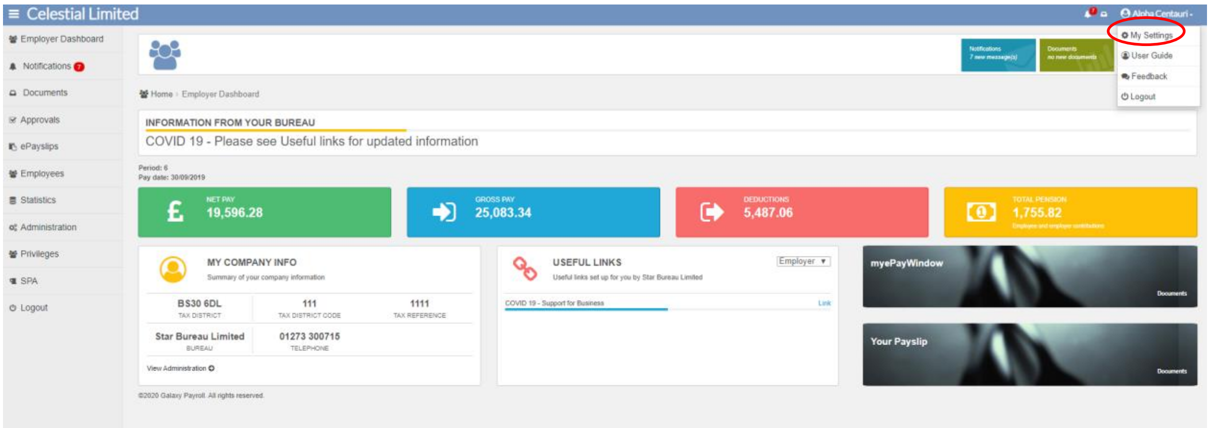
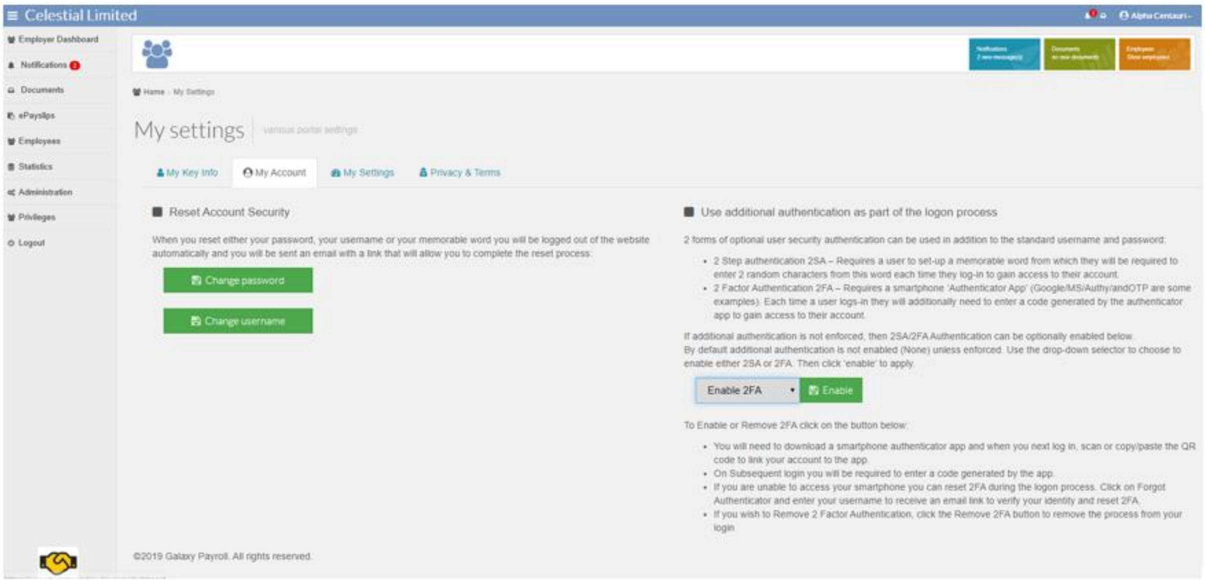
From the Top-bar click on the user name and My Settings.



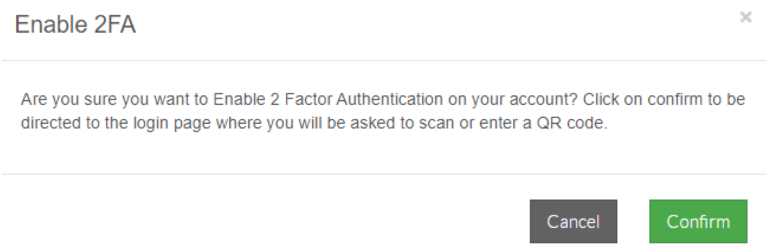
On the My Account tab, click the Enable 2SA button.

If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.

Click the enable button to set-up 2FA



Click on confirm



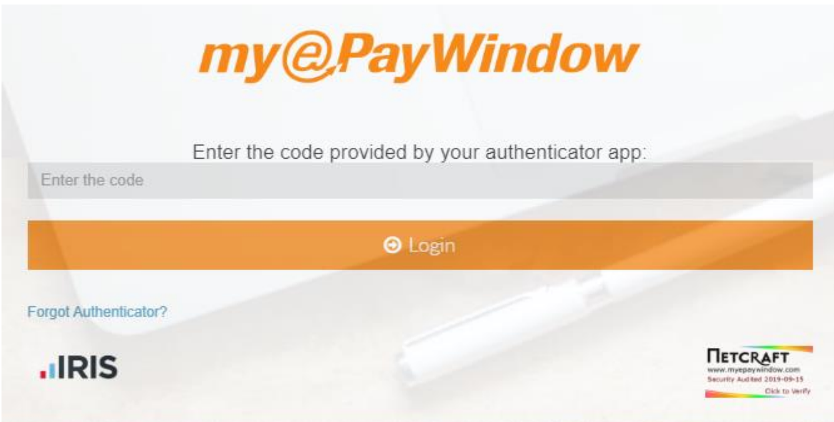
Users will be next asked to enter their username & password, after which they will be asked to scan the QR code or add manually using the authenticator app

Ensure you have your "authenticator app" installed on your smartphone.

Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.

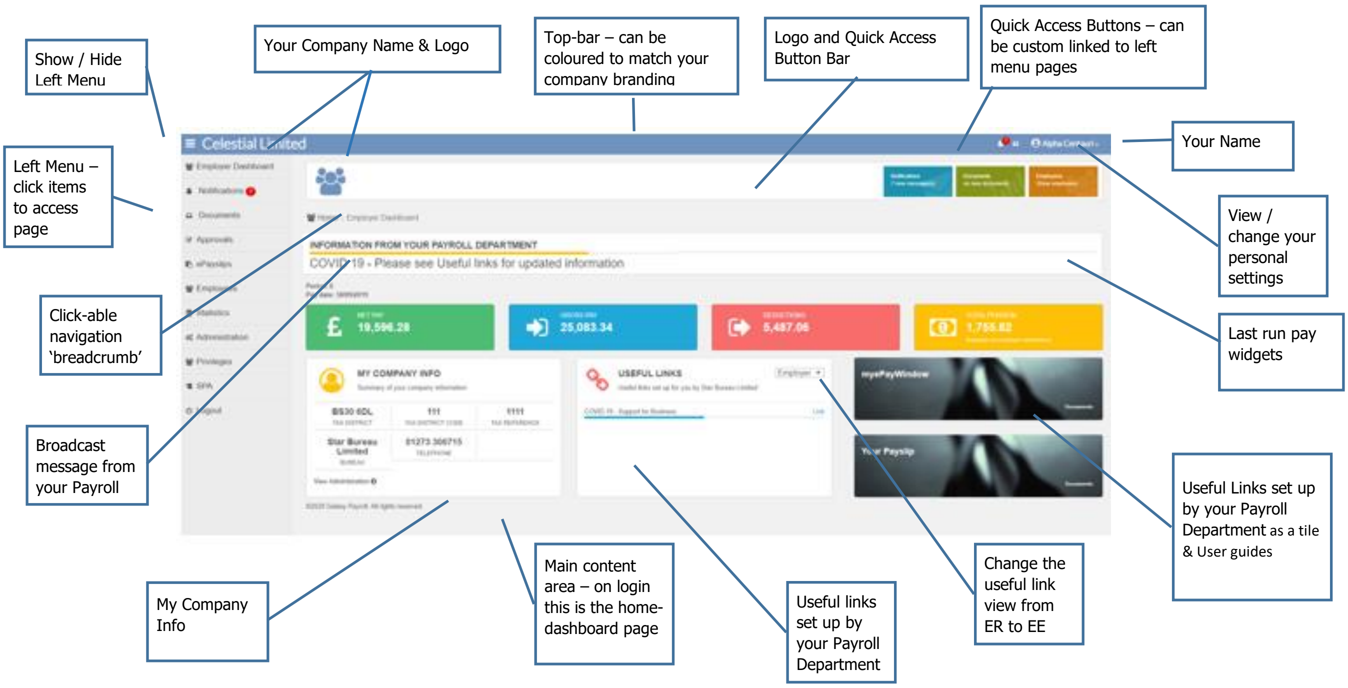
Enter the code provided



Using the Portal

myePayWindow user interface

The diagram below describes the main elements of the Portal site. The layout and options are essentially the same for all Portal users, the main difference being the options available in the 'Left-menu' and the contents of the home-dashboard page.



After logging in to the Portal you will arrive at your Home-Dashboard page from where you can access various menu options and Portal features:

- *Home-Dashboard* – Your home screen, provides data insights regarding your Payroll activity, last pay run, Company info and Pension contributions for the last pay run.
- *Notifications* – a list of various notifications regarding your Payroll, for example payslip and report delivery
- *Documents* – This area contains the reports, Macros sent to you from your Payroll department and any documents uploaded by you (and for them).
- *ePayslips* – Listing of all payslips, CIS Statements, P60s, P45s and P11Ds that have been sent to the Portal, payslips/statements for each period can be opened and viewed
- *Employees* – Listing of current, leaver & CIS employees. Current employees are displayed by default and a leavers/CIS view can be switched using the Current-Leavers-CIS drop-down selector
- *Statistics* – Population Statistics – A snapshot from the last month provides graphs by month or for a selected period
- *Administration* – This is the Portal Administration area for your Company and Employees for you as the Employer
- *Privileges* – This is where you can create Employee Groups based on the Analysis Groups held in Payroll Professional, add your Employees to, create roles, set custom Privileges and assign Employer Users.

- *My Settings* – This is where your personal Portal settings can be viewed and changed. This includes setting 2SA/2FA and enabling email notifications.

Top-bar

The **Top-bar** (see above) appears at the top of the Portal screen and can be coloured to match your company branding.

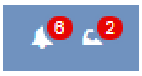
The information displayed on the **Top-bar** from left to right is as follows:

- *Burger icon* – hides/shows the Left Menu
- *Company name* - Your company name
- *Notification alert icon* – shows the number of new notifications
- *Documents alert icon* – shows the number of new documents
- *Logged in User Name* – Your name

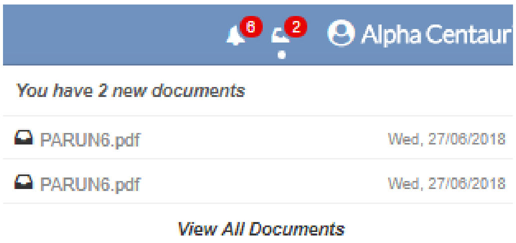
Burger Icon and Company name

The **Burger icon** next to the company name allows you to collapse the Left Menu, allowing the main Portal content to be maximised in the display area.

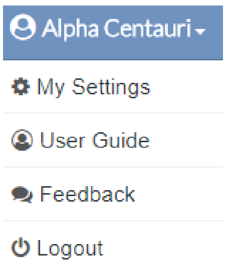
Notification and Document alert icons



The **Alert icon** badges show you the number of new items received for Notifications and Documents, clicking on either of the **Alert icons** will allow you to see summary of the corresponding new items and you can access them directly using the 'View All Documents/Notifications' link.



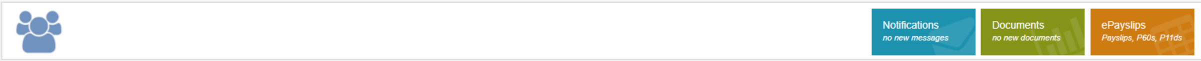
Logged in User Name (you)



By clicking your **User Name,** you can access the My Settings area, user guide and other options as per the dropdown list displayed.

Logo & Quick Access bar

The **Logo & Quick Access** bar is located directly under the **Top-bar**.



When a Logo has been set (see **Administration – Branding** section) it will display on the left hand side of the **Logo & Quick Access** bar.

Additionally, a Logo URL can set up so that when a user (Employer or Employee) clicks the Logo image (see above) they will be redirected to the web page specified.

A Payroll Department logo can be set up to show on the base of the Employers left menu (See **Administration – Details** section)

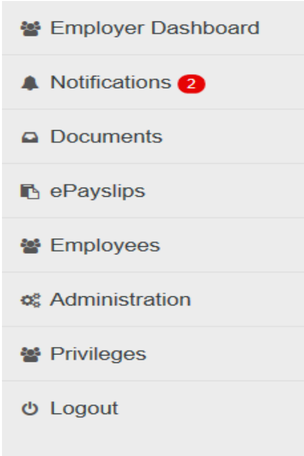
The **Quick Access buttons** appear on the right-hand side of the **Logo & Quick Access** bar. The quick access buttons can be customised so that they link to the left menu page options as required (see **My Settings – My Settings**)

Navigation 'Breadcrumb'

The **Navigation breadcrumb** shows the site location for the current page. You can click on the various sections within the **Navigation breadcrumb** to navigate to the page required (so in the example above by clicking 'Employees Listing' you will go back to the Employees Listing page)

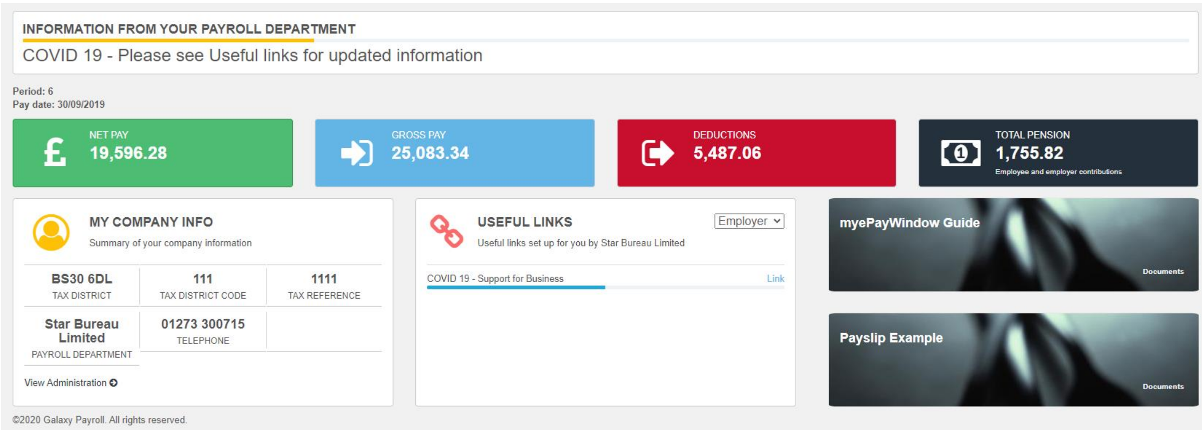
Left Menu

The Left menu allows you to access the main content pages within the Portal. For Notifications and Documents, the number of new items received is displayed in the menu in a red 'alert badge'.



The options available in the left menu vary according to your Portal User type. For example, Employees have no access to Employees or Administration and can only see their own information.

Home-Dashboard page



As the name suggests the Home – Dashboard page is your site home page and is where various 'dashboard' content is displayed.

Broadcast Message – Your Payroll Department can set up a Broadcast message that will show on all Employer dashboards. Employer users can set up Broadcasts for their employees by clicking on **View Administration** or accessing **Administration**/**Employee Dashboard** from the left menu. Please see the administration section for further guidance.

The Home-Dashboard is where various dashboard widgets can be displayed to show summary information relating to your payroll

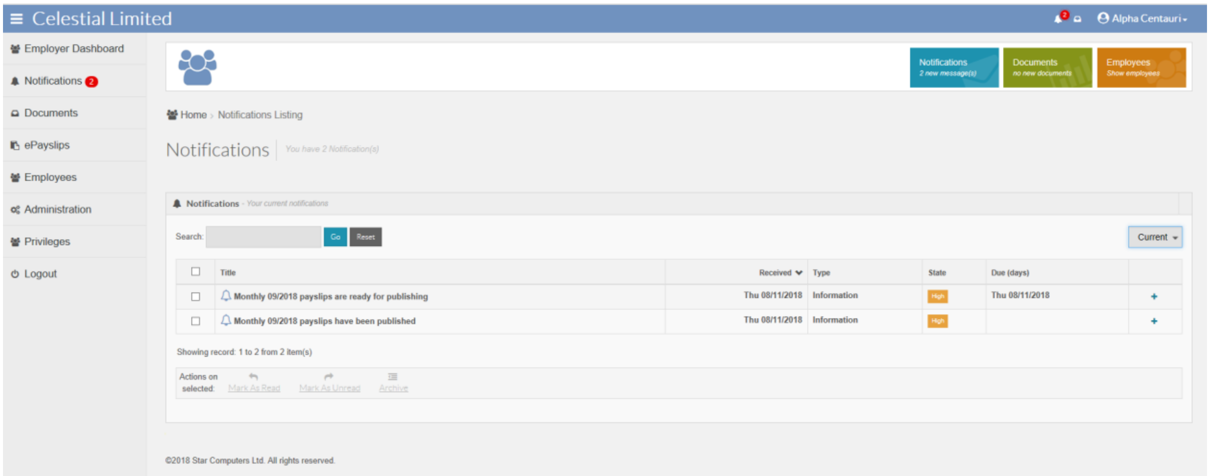
My Last Pay Run widget, this shows the breakdown for the last pay run, Period details, the Total Pay, Deductions, Net Pay & Total Pension contributions (ER & EE) these figures are a total for all employees paid in the period. The ePayslips can be accessed from this by clicking on the widget.

Note: If Employer Privileges are enabled and users **do not** have access rights to all information the **My Last Pay Run widget** will not show.

The **My Company Info** widget displays Employer Tax information – Tax district, Tax District code and Tax Reference. Your Payroll Department name and telephone number if relevant. You can access your company Administration settings by clicking on **View Administration**.

The **Useful Links** widget displays useful links that have been set up by your Payroll Department to display on the employer dashboard. You can create Employee useful links by clicking on **View Administration** or accessing **Administration/Employee Dashboard** from the left menu. See the Administration section for further guidance.

Notifications



The Notifications page shows various notifications that are sent to you. Notifications are a result of actions carried out in the Payroll Professional application or actions on the Portal. You can click to sort on the various column headings in the notification list.

To manage your notifications, you can mark them individually or collectively as 'read' and remove them from the 'current' view by archiving them. Use the **Current/Archive selector** at the top right-hand side of the notifications list to switch views.

As an Employer you receive Notifications after the following events:

- [1]Payslips are <u>ready for publishing – </u>Employees cannot see Payslips yet but you can review now in advance of the publish date
- [1]Payslips have been published – On the day when Employees are able to access their payslips
- [1]CIS Statements are <u>ready for publishing – </u>CIS contractors cannot see statements yet but you can review now in advance of the publish date
- [1]CIS Statements have been published – On the day when CIS contractors are able to access their statements
- [1] P45s have been published– when P45s are uploaded by your Payroll Department
- [1] [YearYYYY] P60s have been published for [X] Employees – when P60s are uploaded for X number of Employees by your Payroll Department
- [1] P11Ds are available for [X] Employees – when P11Dss are uploaded for X number of Employees by your Payroll Department
- Your Payroll Department has downloaded a document you have uploaded for them

- A new Payroll report / document /Macro or group report has been sent to you by your Payroll department – View notes attached to the document.
- Your Payroll Department has deleted a document – Most likely uploaded in error or superseded
- Advance warning that a document will be deleted in 10 days – reminder to download a copy if you want to retain a copy
- AE letters have been uploaded for [X] Employees – where X is the number applicable
- An Employee has declined consent to use the Portal either during or after Portal registration
- An Employee Leaver Portal account will be deleted in 10 days
- An Employer Leaver Portal account has been deleted
- Portal terms and conditions have been updated – myePayWindow usage terms have changed and you will need to confirm your agreement.

Notes:

[1] In the current Portal version, these notifications are only sent to the default Employer User, you define this user via **Administration - Details**
Archived notifications are automatically deleted by portal housekeeping routines 3 months after their 'due' date' or the 'received date' when there is no notification due date.

You can choose via **My Settings** if you want to receive an email reminder summary for new notifications received in the past hour.

Notifications have the following features:

- Title – Description of the notification
- Received date – the date the notification is received
- A 'Type' – either Pay run data, Starters and leavers, Other, Registration, Information
- A 'State' – High (needs attention), Moderate, or Low (most are High by default)
- Due date (Xd) – For documents sent by Employers, the accompanying notification will show the pay date for which the document applies and how many days (Xd) remain between now until this date (this will dynamically update)

Notification actions:

Click **'+ / -'** in the end column or anywhere on notification to expand or collapse view to see 'item actions'

- Mark as Read/Unread – this decrements/increments the Icon 'badge' in the menu and top bar and bolds/ un-bolds the entry in the listing
- Archive / Un-Archive – once read a notification can be moved to the archive list
- Download – for notifications that relate to documents
- Payslip – view the payslips/CIS Statements
- Multi-select Actions – by clicking the select tick-box you can select multiple notifications and apply actions from the actions shown at the footer of the notifications listing e.g. Archive or Mark as Read

Documents

The Documents page shows a list of all documents that have been sent to you by your Payroll department via Payroll Professional and any files uploaded by you for the attention of your Payroll department. Individual reports, Macros and group reports are shown in this listing. You can click on the column headings in the documents list to sort in ascending/descending order. You can manage documents by marking them as 'read' and can permanently delete them. You can switch between the current and deleted documents view by using the **Current/deleted selector** at the top right-hand side of the documents list.

Note: Documents will only be retained for a maximum time period of 3 months from the date of upload. After this time an automatic housekeeping routine will delete the documents. You will receive a notification 10 days prior to deletion for each item due to be deleted so it is recommended you download documents locally for your records. When you delete a document, it is permanently deleted. The deleted view is a 'reminder' view of your deleted documents. If you accidentally delete a document, ask your Payroll department to upload it again.

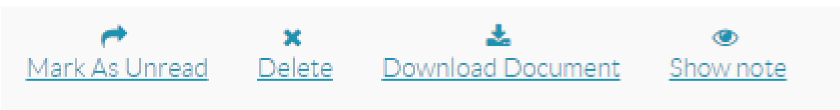
Documents have the following features:

- Name – The document name
- Received date – the date the document was received
- Size – the file size in kilobytes
- Type – usually Pay run data, Starters & Leavers, Macro, Report or Other
- Status – Published, Submitted, Received or Downloaded
- Submitted by – details of the user that submitted by

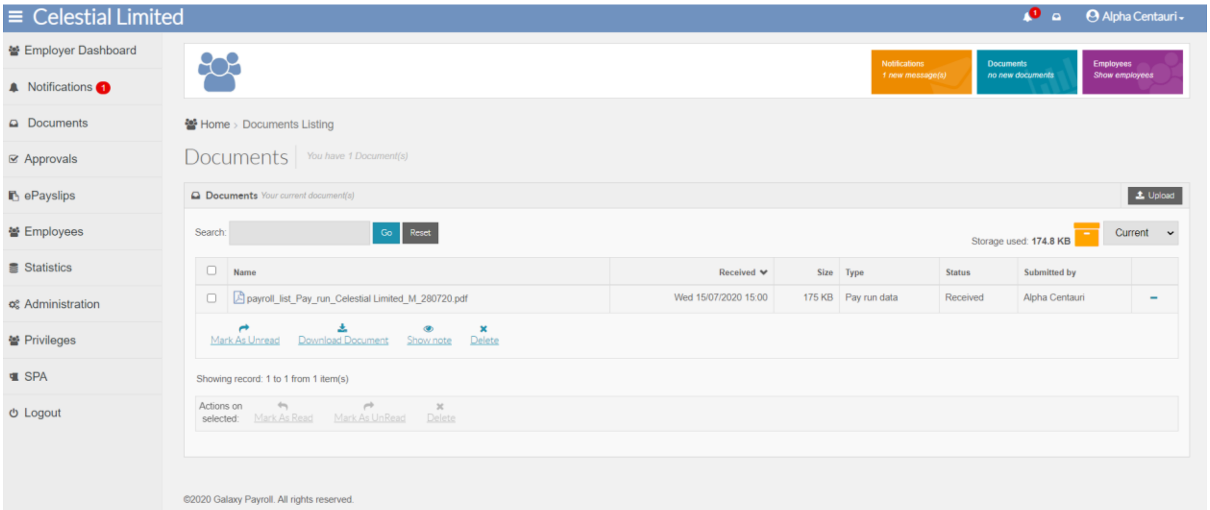
The status of a document sent to you by your Payroll department is initially shown as **Published**. When you download a copy of the document its status updates to **Downloaded**. The status of the documents you upload (see Uploading Documents section) have an initial status of **Submitted**, when you upload. Your Payroll department will receive a notification that you have uploaded a file and once they have downloaded the file the document status will update to **Received**. If you or another Employer user download the document first, before the Payroll department user, the status will be updated to **Downloaded** so you will know that only documents with the status of 'Received' have really been received by your Payroll department.

Document actions:

Click **'+ / -'** or anywhere on document to expand or collapse the view to see 'item actions'



- Mark as Read/Unread – this decrements/increments the Icon 'badge' in the menu and top bar and bolds/un-bolds the entry in the listing
- Delete – permanently deletes the document and creates an entry in the deleted view
- Download – downloads a copy of the document
- Show Note – View the note attached to the document
- Multi-select Actions – by clicking the select tick-box you can select multiple documents and apply actions from the actions on selected area at the footer of the notifications listing e.g. Mark as Read/Unread or Delete



Uploading Documents

As an Employer user, you can upload documents to the Portal for you and your Payroll department via the **Documents** page. To upload a document, use the **Upload** button located at the top right-hand side of the documents listing. Documents are sent securely and encrypted while stored on the Portal to ensure a safe end to end process.

The **Upload** button opens the **Upload Document** page from where you can specify the type of file you wish to upload.

You must first choose the **Type of data** from the following options:

- Pay run data
- Starters & leavers
- Other

For Pay run data and Starters & Leavers you will need to set the Pay run **Frequency** relevant to the data you are uploading.

The **Pay Date** field allows you to set the pay date for the data being uploaded.

By clicking **Choose File**, you can browse your computer and select a file for upload. Only the following file formats are allowed:

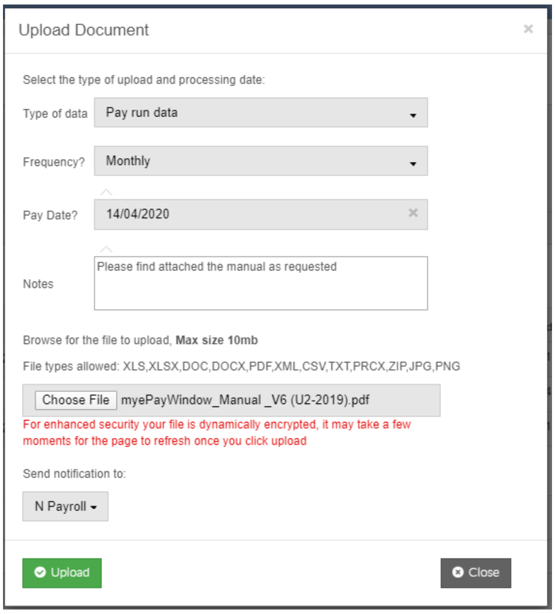
- XLSX, XLS
- DOCX, DOC
- PDF
- XML
- CSV
- TXT
- PRCX
- ZIP
- JPG
- PNG

Using the ‘send notification to’ drop-down you can specify to which Payroll department user a notification will be sent. Only change the default setting if this has been previously agreed with your Payroll department.

Note: Your Payroll department does have the ability to choose additionally to receive an email notification to a central mail account (i.e a specified mail account they choose) whenever you upload a document. This will allow them to have oversight in the event your normal payroll contact is not available.

The maximum file size that can be uploaded is 10MB.
A message will appear, and the upload button will be unavailable if the file is over 10MB

Once a file has been selected click on **Upload** and the document will be uploaded to your documents area. A notification is sent at the same time to the Payroll department user specified.



You (The Employer user) will receive a notification when the Payroll department user has downloaded the document.

If the Payroll department deletes a document you will receive a notification to tell you.

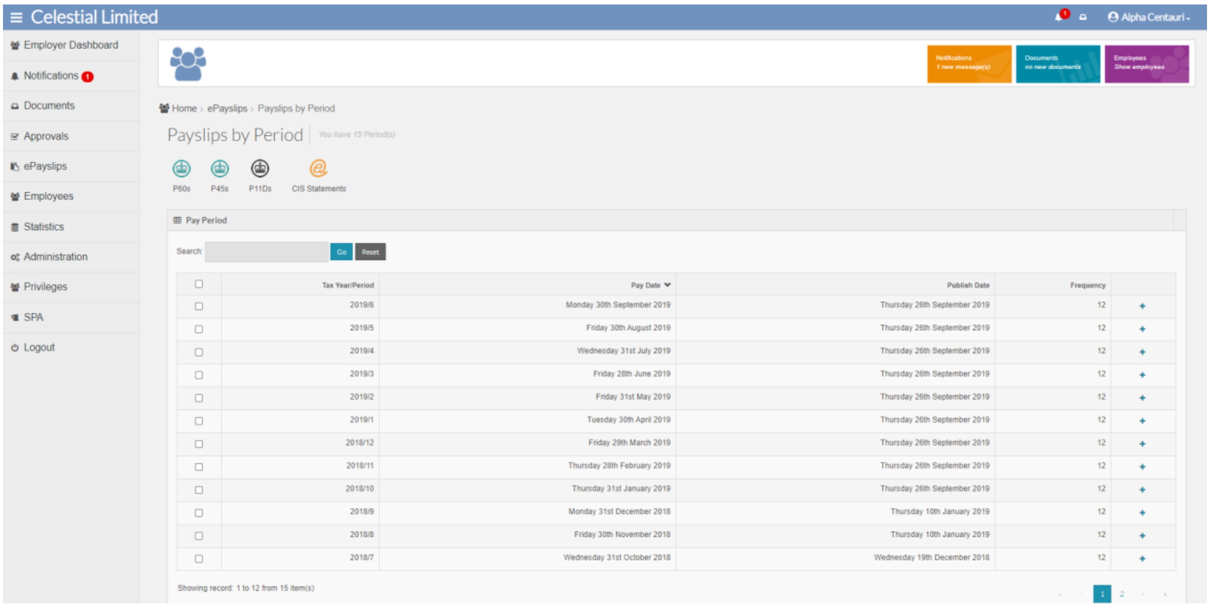
Note: The Document uploaded to the Payroll department will be renamed based on the File name, Report, Client name and the date.

ePayslips

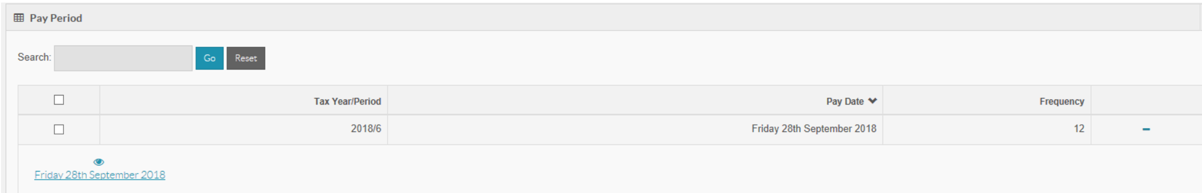
Payslips by Period

The ePayslips left menu option displays the Payslips by period page. For each period in the list payslips are available to either view or download for all employees that were payroll processed.

The data grid details the Pay Date and Publish Date for reference.

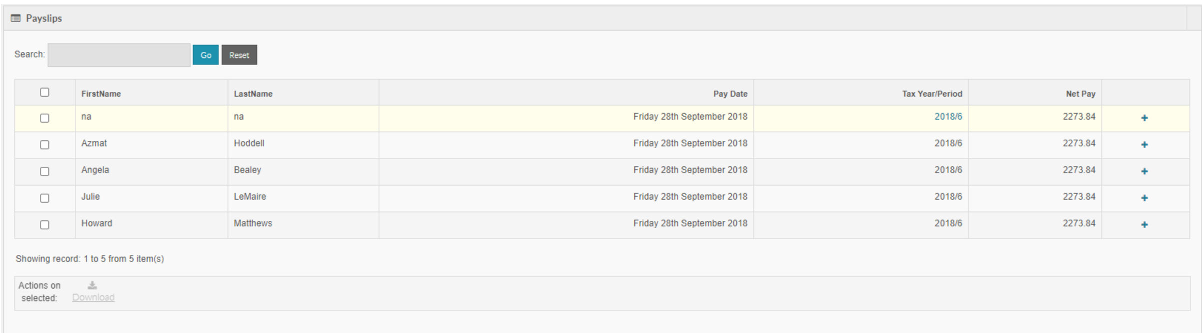


Click on a period in the listing to expand the entry and access the 'View' action:

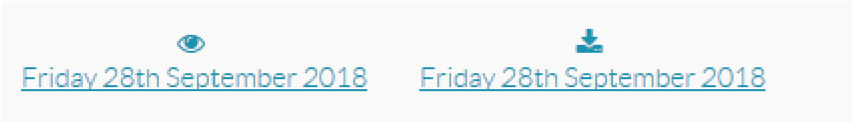


Click the **view action** for the Pay period chosen:

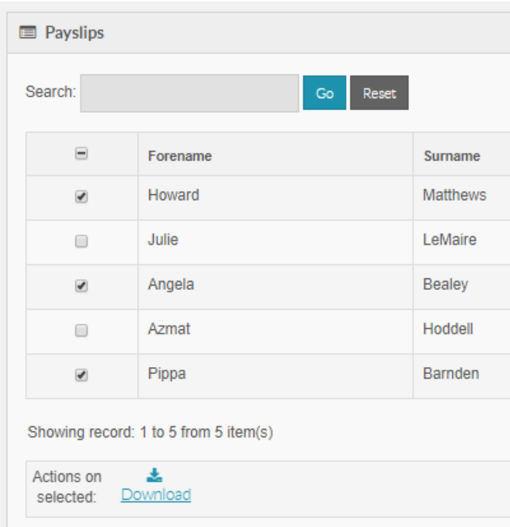
This will open a page listing of employees.



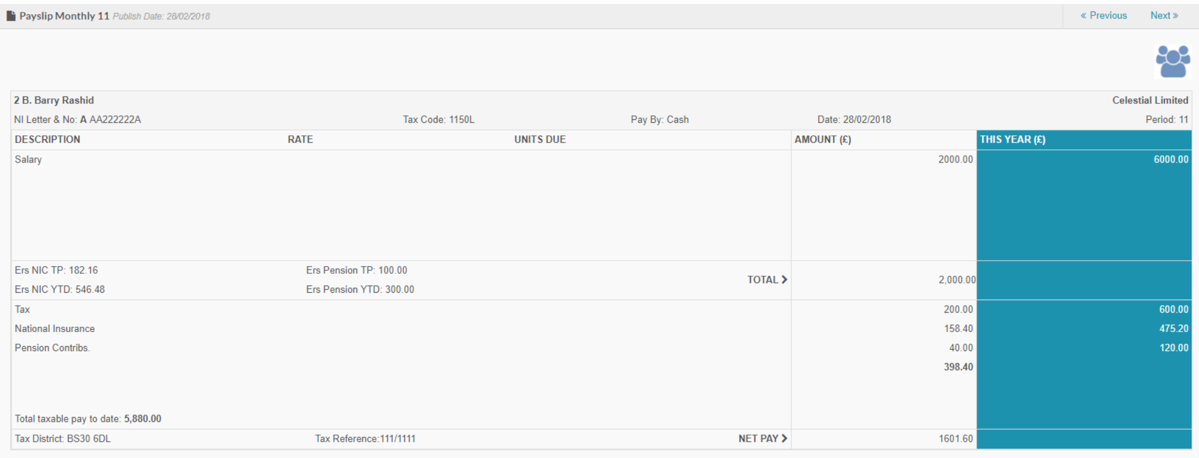
Click on any Employee name to access actions to either **view** or **download payslips** as required.



To download payslips for all employees use the check-box in the header of the first column to select all, or selectively set the check-box against required Employees and then at the footer of the Employees list click **Actions on selected**: **Download**



When viewing an online payslip, you can use the **Previous** and **Back** buttons to scroll through each employee's payslips in the selected period. The payslip layout will display according to the template you have set (see **Administration-payslip settings**)



CIS Sub-Contractors

Sub-contractors are set-up in Payroll as a specific type of Employee (refer to Payroll professional help file)

The following information needs to be completed prior to inviting a sub-contractor to register and create an account on the portal: -

- Email address
- First Name
- Surname
- DOB
- NI Number or Passport Number (If actual NI Number or Passport number is not available, enter a chosen word in the passport number field so the Sub-Contractor can register successfully).

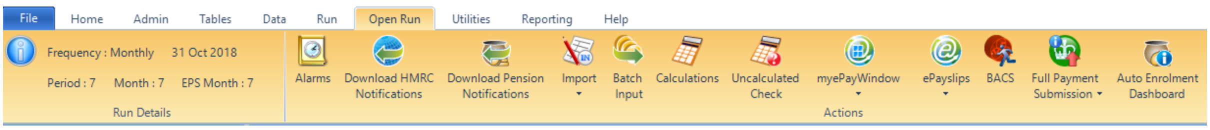
Once this information has been added, the sub-contractor can be invited as per regular employees (refer to myePayWindow user guide).

Creating & uploading CIS Statements

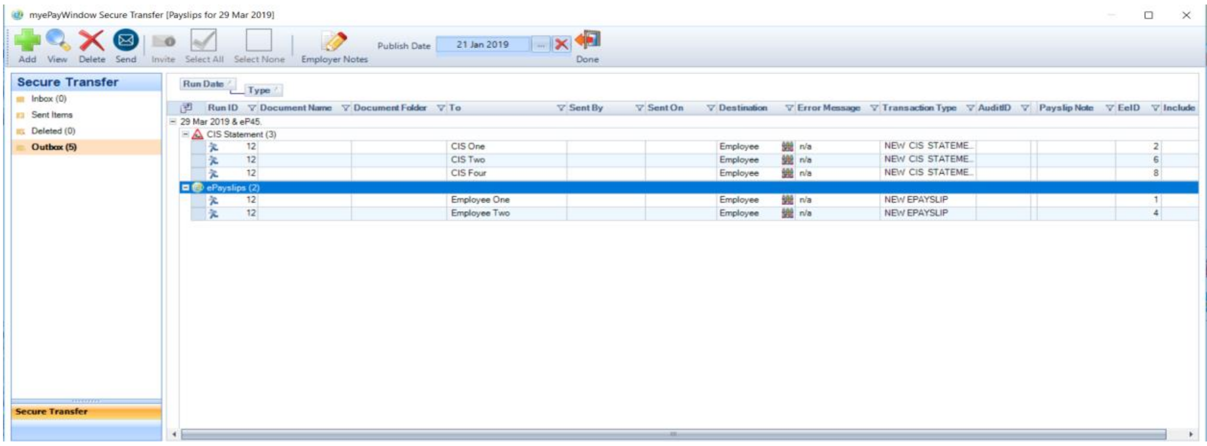
When a pay run has been completed, CIS Statements based on PASCSTAT/PSSCSTAT will automatically be sent to the **myePayWindow Open run,** Secure Transfer Outbox.

If you wish to print paper CIS Statements, please run the reports prior to sending the CIS Statements to the Portal.

To send CIS Statements to the Portal (Employer & Employee per period), go to **Open run**, **myePayWindow**, secure transfer outbox.



From the **Outbox**, you can 'expand' the date stamped CIS entry to see its details. In the example below, you can see both CIS Statements and ePayslips (x) where x is the number of statements/payslips to be sent to the Portal.

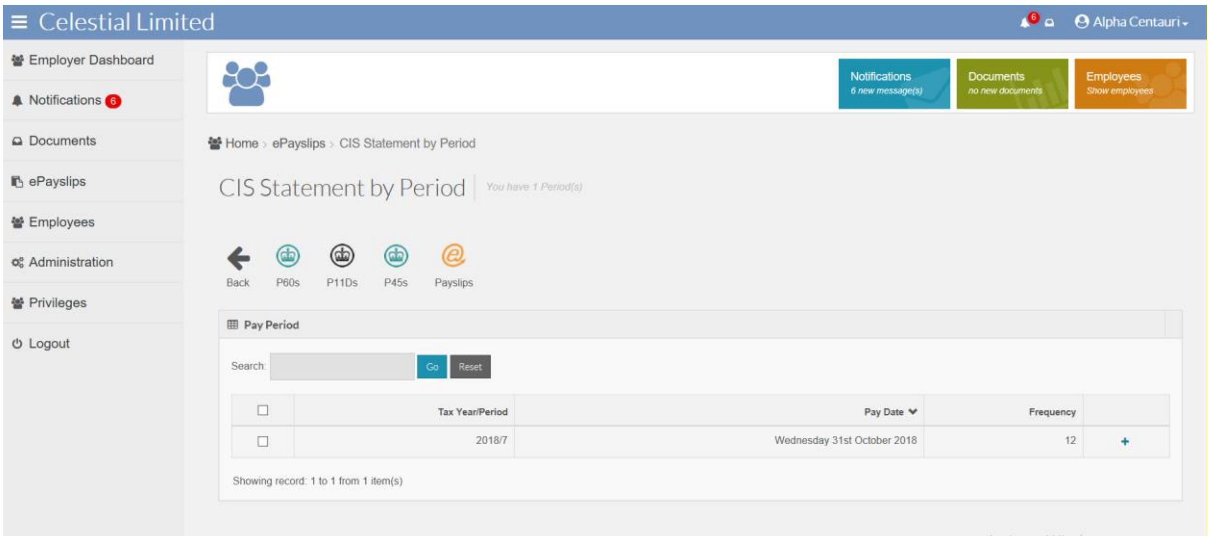


CIS Statements by Period

From the Payslips by Period page click the CIS Statements icon to view your CIS Statement (as available & when uploaded by your Payroll Department)

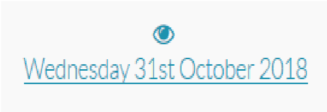
Click icons to switch view to P60s, P11Ds, P45s or Back to Payslips by Period

For each period in the list CIS are available to either view or download for all CIS Contractors that were payroll processed.

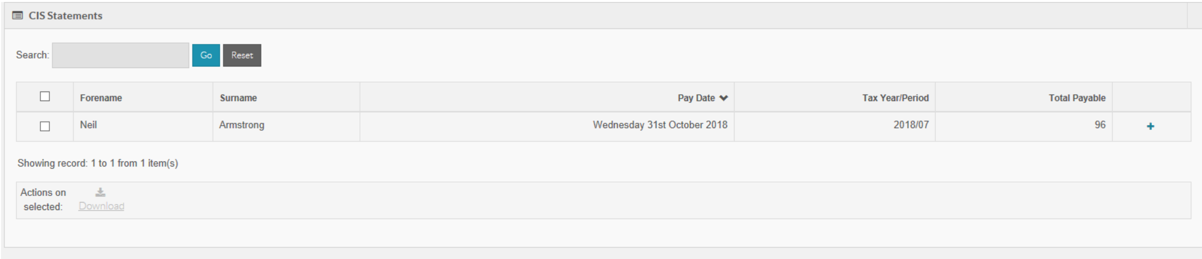


Click on a period in the listing to expand the entry and access the 'View' action:

Click the **view action** for the Pay period chosen:

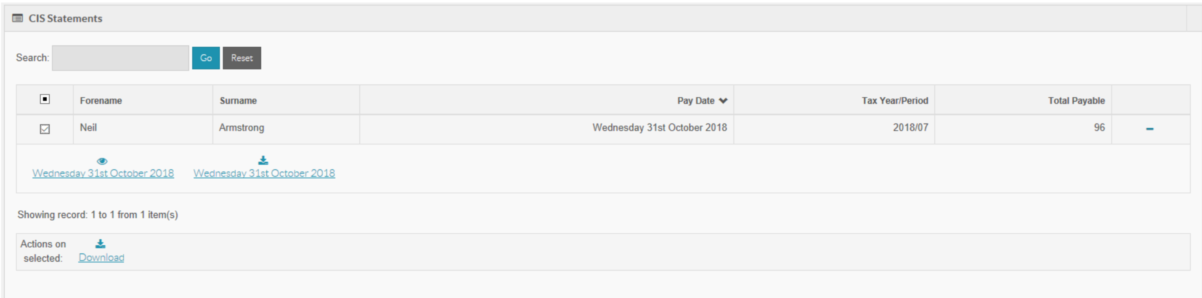


This will open a page listing of CIS Contractors



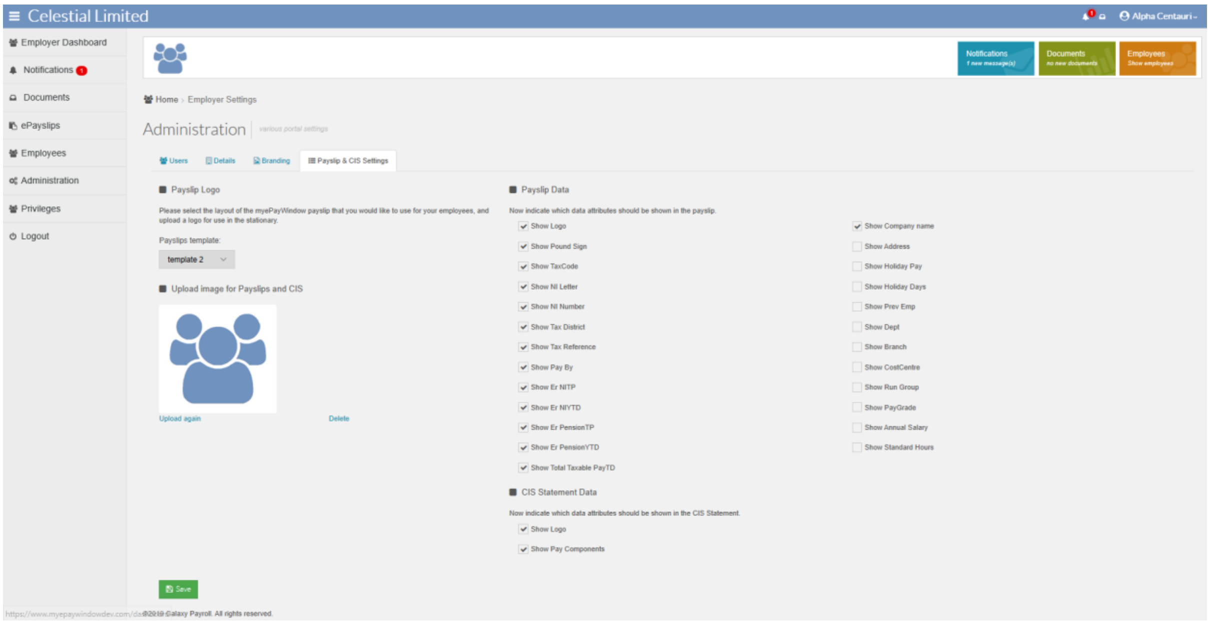
Click on any CIS Contractor name to access actions to either **view** or **download CIS Statements** as required.

To download CIS Statements for all contractors use the check-box in the header of the first column to select all, or selectively set the check-box against required Contractors and then at the footer of the list click **Actions on selected**: **Download**

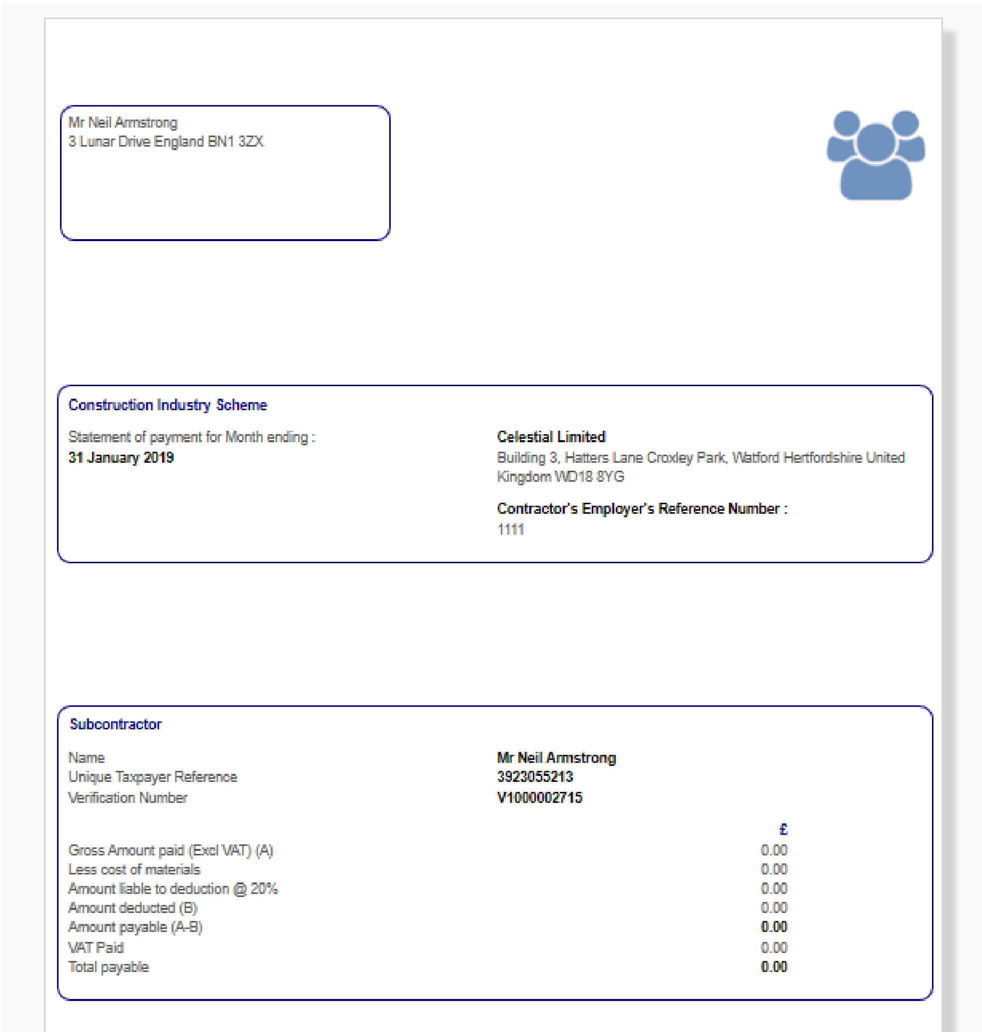


When viewing an online statement, you can use the **Previous** and **Back** buttons to scroll through each CIS Statement in the selected period.

The CIS Statement settings can be changed under the Administration menu on the left, click on the Payslip & CIS Settings and tick CIS Statement data box to show the Pay Component data on page 2 of the statement. Click on show logo to show the logo on the CIS Statements.



The layout for page 1 of the Statement will display as below: -



Mr Neil Armstrong
3 Lunar Drive England BN1 3ZX

Construction Industry Scheme

Statement of payment for Month ending :
31 January 2019

Celestial Limited
Building 3, Hatters Lane Croxley Park, Watford Hertfordshire United Kingdom WD18 8YG

Contractor's Employer's Reference Number :
1111

Subcontractor

Name	**Mr Neil Armstrong**
Unique Taxpayer Reference	**3923055213**
Verification Number	**V1000002715**

	£
Gross Amount paid (Excl VAT) (A)	0.00
Less cost of materials	0.00
Amount liable to deduction @ 20%	0.00
Amount deducted (B)	0.00
Amount payable (A-B)	**0.00**
VAT Paid	0.00
Total payable	**0.00**

Page 2

Mr Neil Armstrong

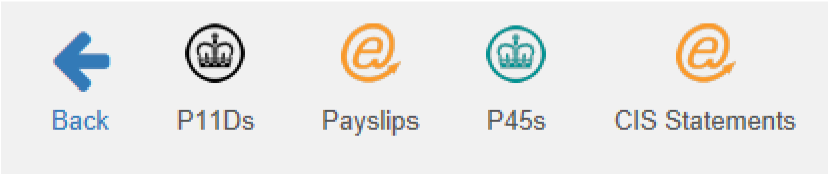
Pay Component Breakdown

Labour	Units	Rate	Due
Hours	0.00	15.00	0.00

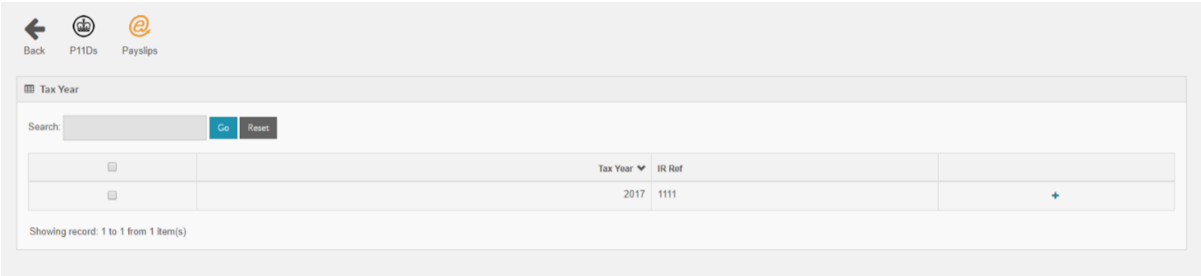
P60s and P11Ds

From the Payslips by Period page click the P60s or P11Ds icons to view your P60s or P11Ds by Period (as available & when uploaded by your Payroll Department)

Click icons to switch view to P11Ds, back to Payslips by Period, P45s or CIS Statements



Search for P60s by Tax Year, click column heading to sort ascending, descending, click '+ / -' or anywhere on the entry to expand or collapse the view to open the view icon.



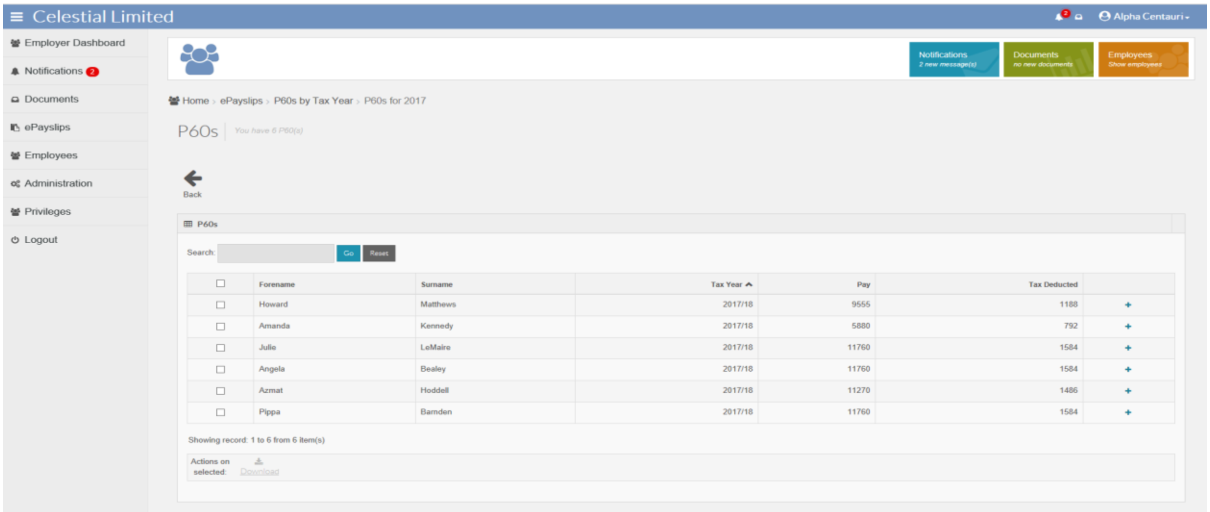
To view P60s for Tax year, click on the view icon for the selected Tax Year.

You can search P60s in the listing by Forename, Surname, Tax Year, Pay, Tax deducted (click column heading to sort ascending / descending).

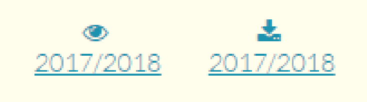
To 'select all' use the checkbox at the top of the first column, this allows a multi-select download action. Clicking 

will download P60s for Employees selected.

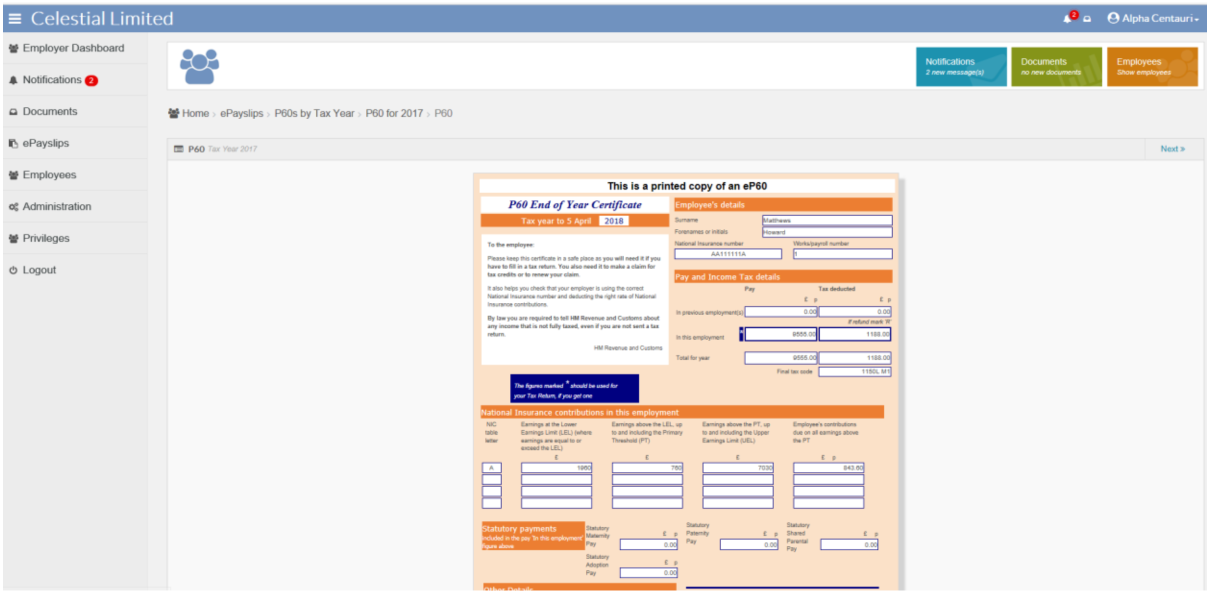
Click '+ / -' or anywhere on Payslip entry to expand or collapse view, to view or download



P60 actions for period by employee; **View** or **Download**



Click on the Navigation Breadcrumb to go back to P60 listing by Employee or Tax year or (or Home etc.)



Note: P60's should be run at the appropriate time of distribution e.g. At year end to ensure that any leavers that left during the year are removed from the P60 upload. You are unable to delete P60s from the secure transfer box once uploaded.

You are able to export the P60 report as a document and upload to the portal

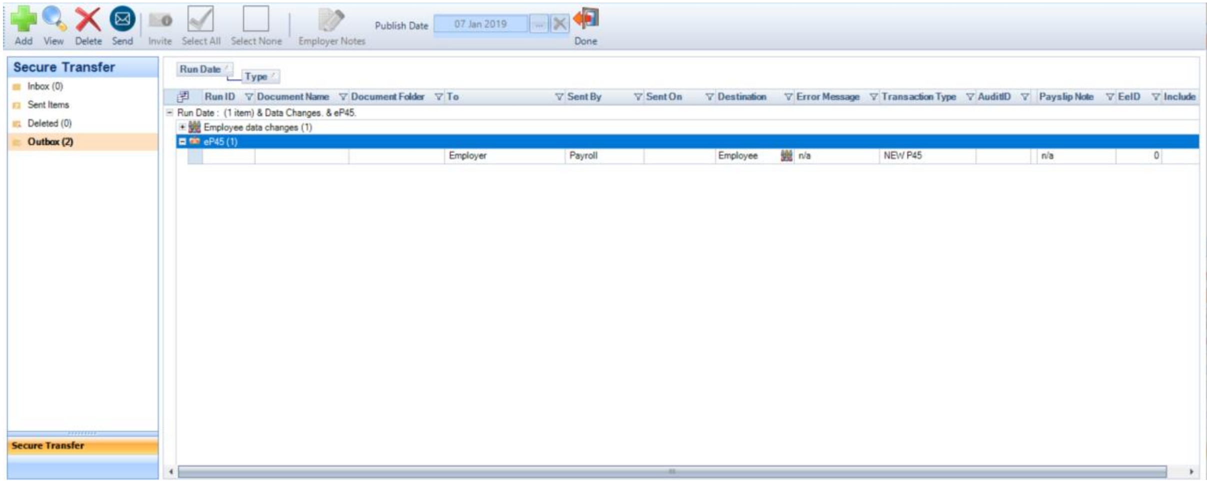
P45s

Note: Parts of the Payroll program may not be applicable to an Employer user unless they process their own payroll.

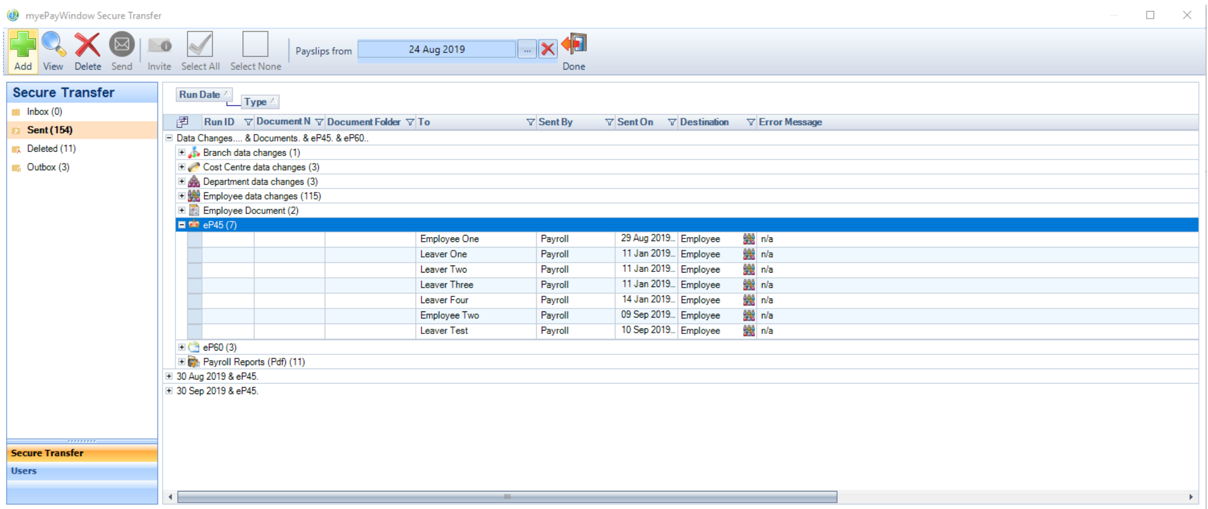
The leaver tick box needs to be entered against the Employee record in Payroll Professional in order for the Employee to be shown as a 'leaver' in the Portal Employees listing. This can be via the leaver tick box or when you close the period.

To create the P45, a leave date must be entered in Payroll Professional and also a Full Payment Submission needs to be successfully completed before the eP45 is automatically generated and sent to the **Open Run**, **myePayWindow**, Secure transfer outbox.

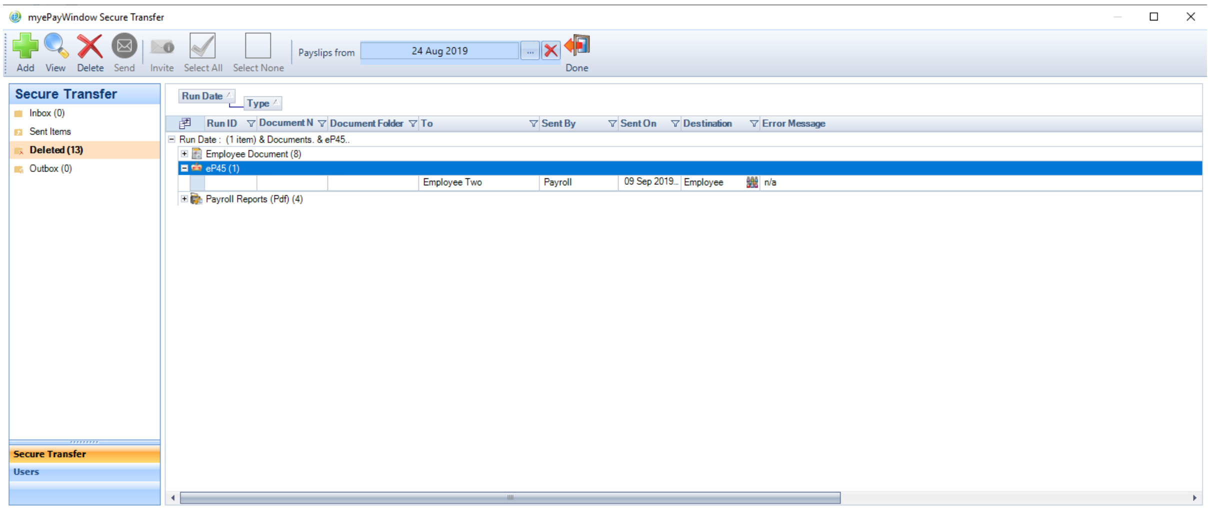
From the **Outbox**, you can 'expand' a date stamped entry to see its details. In the example below you can see eP45 (x) where x is the number of P45s to be sent to the Portal. Click Send.



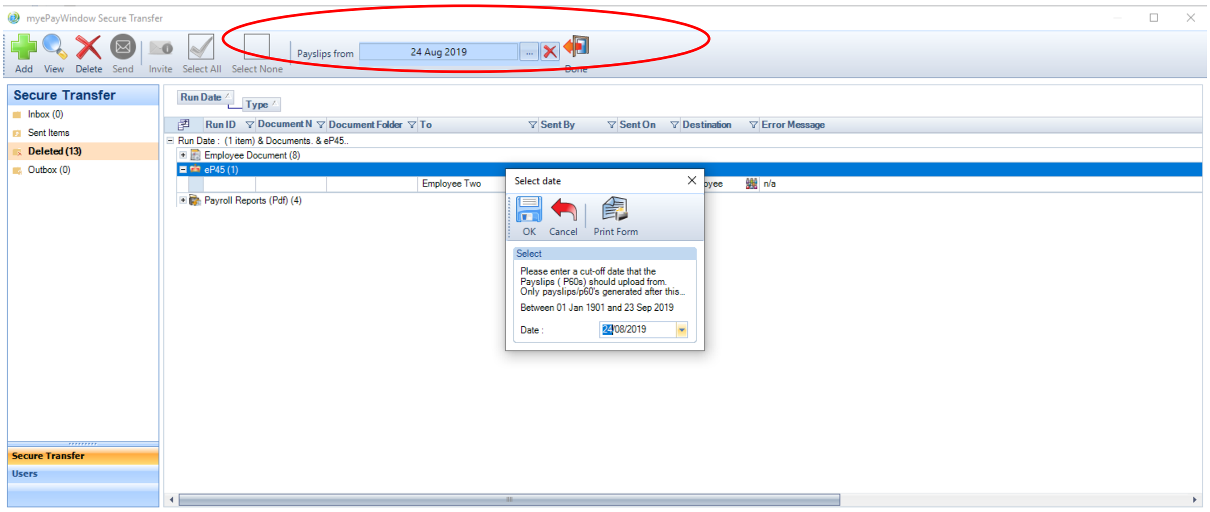
Click on the sent items to view sent P45s and further information on name and what date sent.



Click on delete items to view deleted P45s.



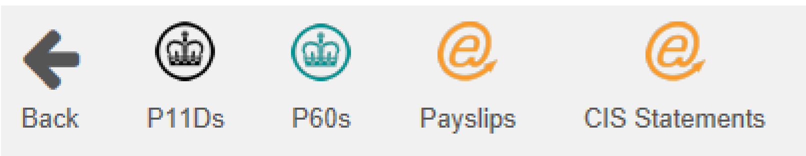
Note: If you wish to see historical items, ensure that the payslips from date box on the top tool bar reflects the period you require.



P45 View in myePayWindow

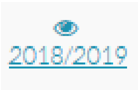
From the ePayslips by Period page click the P45s icons to view your P45s by Period (as available & when uploaded by your Payroll Department)

Click icons to switch view to P11Ds, P60s, CIS Statements or Back to Payslips by Period



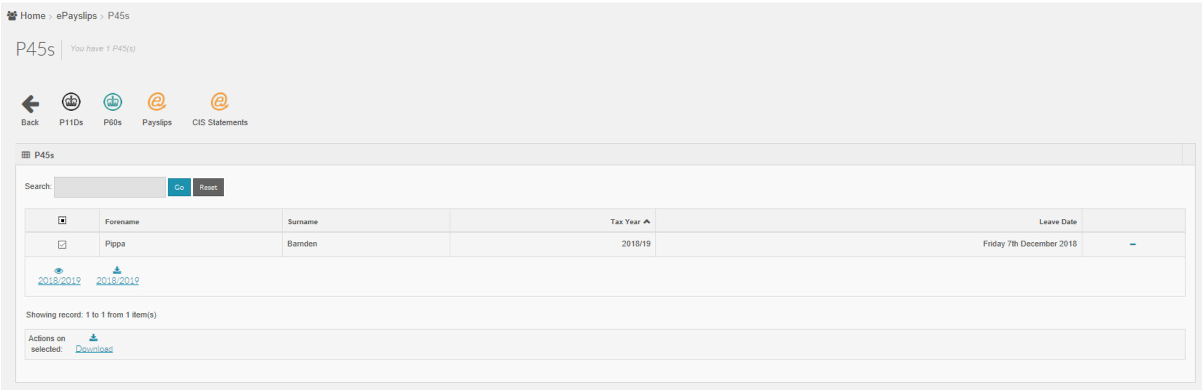
Search for P45s by name or leave date, click column heading to sort ascending, descending, click '+ / -' or anywhere on the entry to expand or collapse the view to open the view icon.

To view P45s, click on the view icon for the selected Tax Year.

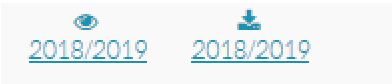


To 'select all' use the checkbox at the top of the first column, this allows a multi-select download action. Clicking 

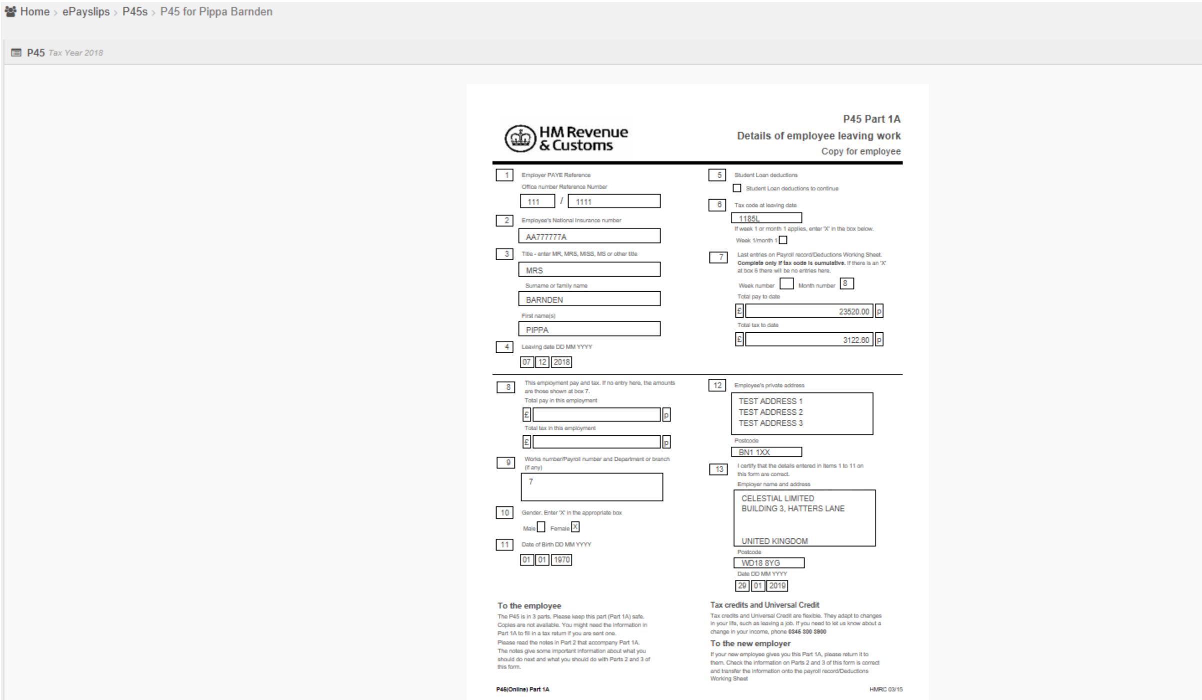
will download P45s for Employees selected.



P45 actions for period by employee; **View** or **Download**



Click on **View** (see below) or **Download** to a PDF document



Home > ePayslips > P45s > P45 for Pippa Barnden

P45 Tax Year 2018

HM Revenue & Customs

P45 Part 1A
Details of employee leaving work
Copy for employee

1 Employer PAYE Reference
Office number Reference Number
111 / 1111

2 Employee's National Insurance number
AA777777A

3 Title - enter MR, MRS, MISS, MS or other title
MRS
Surname or family name
BARNDEN
First name(s)
PIPPA

4 Leaving date DD MM YYYY
07 12 2018

5 Student Loan deductions
Student Loan deductions to continue

6 Tax code at leaving date
1185L
If week 1 or month 1 applies, enter 'X' in the box below.
Week 1/month 1

7 Last entries on Payroll record/Deductions Working Sheet. **Complete only if tax code is cumulative.** If there is an 'X' at box 6 there will be no entries here.
Week number Month number 8
Total pay to date
£ 23520.00 p
Total tax to date
£ 3122.60 p

8 This employment pay and tax. If no entry here, the amounts are those shown at box 7.
Total pay in this employment
£ p
Total tax in this employment
£ p

9 Works number/Payroll number and Department or branch (if any)
7

10 Gender. Enter 'X' in the appropriate box
Male Female X

11 Date of Birth DD MM YYYY
01 01 1970

12 Employee's private address
TEST ADDRESS 1
TEST ADDRESS 2
TEST ADDRESS 3
Postcode
BN1 1XX

13 I certify that the details entered in items 1 to 11 on this form are correct.
Employer name and address
CELESTIAL LIMITED
BUILDING 3, HATTERS LANE

UNITED KINGDOM
Postcode
WD18 8YG
Date DD MM YYYY
29 01 2019

To the employee
The P45 is in 3 parts. Please keep this part (Part 1A) safe. Copies are not available. You might need the information in Part 1A to fill in a tax return if you are sent one.
Please read the notes in Part 2 that accompany Part 1A. The notes give some important information about what you should do next and what you should do with Parts 2 and 3 of this form.

Tax credits and Universal Credit
Tax credits and Universal Credit are flexible. They adapt to changes in your life, such as leaving a job. If you need to let us know about a change in your income, phone **0345 300 3900**

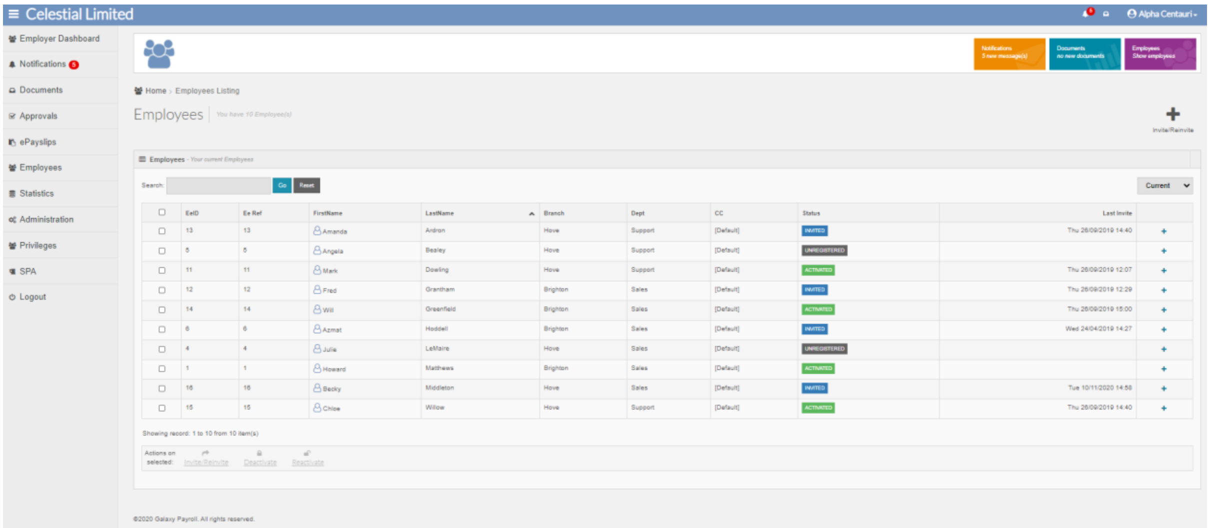
To the new employer
If your new employee gives you this Part 1A, please return it to them. Check the information on Parts 2 and 3 of this form is correct and transfer the information onto the payroll record/Deductions Working Sheet

P45(Online) Part 1A HMRC 03/15

Click on the Navigation Breadcrumb to go back to P45 listing by Employee or Tax year or (or Home etc.)

Employees

The **Employees** option in the **Left Menu** opens a page showing all Employees within your company and their status on the Portal. Click anywhere on an Employee user entry, or on the **'+'** button to see the actions available for each individual Employee – the actions available will vary depending upon the user status. Multi-select actions are also available.



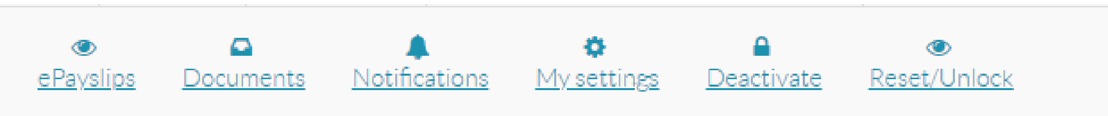
Portal status definitions

A Portal user's status (Employer User, Employee) will be one of the following.

- Unregistered – user (Payroll Department User, Employer User, Employee) not yet invited
- Invited – Invitation sent from Payroll Professional or myePayWindow no action taken by user yet. A date & time stamp of when the user was last invited will show in the last column on the grid.
- Activating – User has received invitation and is going through registration
- Activated – User has completed registration and is set up
- Deactivated – User account has been Deactivated by Employer or Payroll Department
- Declined – User has not given Consent, or withdrawn Consent
- Locked – User has five failed login attempts, account locked for one hour. The Status will no longer show as Locked (Red) in the datagrid. Select Reset/Unlock to see the status. Privacy Pending – User has not yet agreed to recently updated terms of use/Privacy

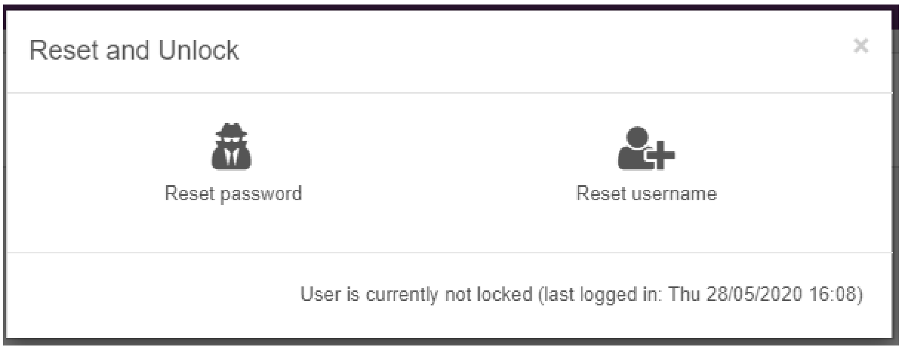
For Employees with a status of Unregistered, Invited, Activating or Declined, the actions available are as follows:

For already Activated or Deactivated Employees additional actions are available to either Deactivate or Activate.

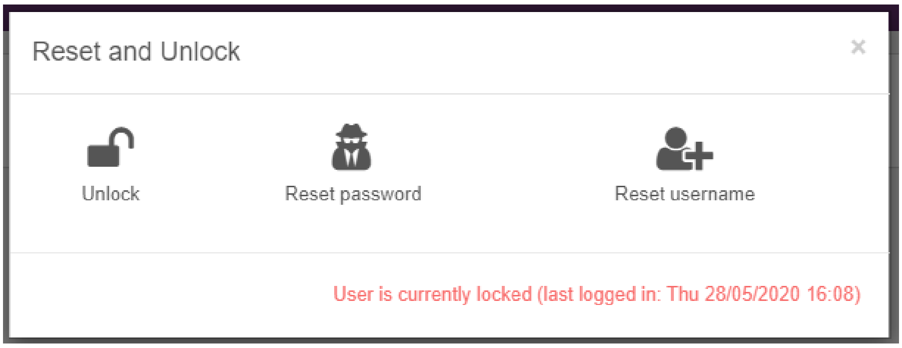


The actions for available for each employee are:

- ePayslips – view payslips, P60s, P11Ds, P45s for the selected Employee
- Documents – view documents that have been sent to an Employee E.g. Auto Enrolment letter
- Notifications – see the notifications sent to an Employee
- My settings – access the Employee settings (see the email address they have used for their Portal account)
- Invite/Re-invite – Send Invitations and re-invitations for Employees not currently registered
- Deactivate-Reactivate – temporarily deny-reinstate activated Employee access to the Portal
- Reset memorable word – Send / initiate a reset memorable word email for a specific Employee
- Reset/Unlock– Send / initiate a reset password/username email for a specific Employee and unlock.

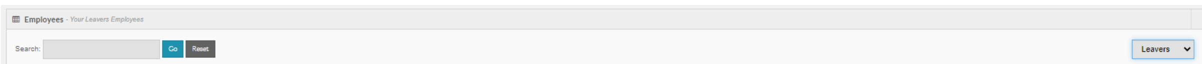


If the user is locked out a message will show in red and an unlock action will appear. select unlock to reactivate the user.



Leavers view

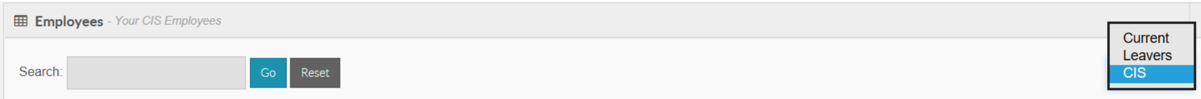
Use the drop-down selector at the top right-hand side of the Employees listing to switch the view to see Employees who have been set as 'leavers' or 'CIS' by your Payroll Department in the Payroll software application.



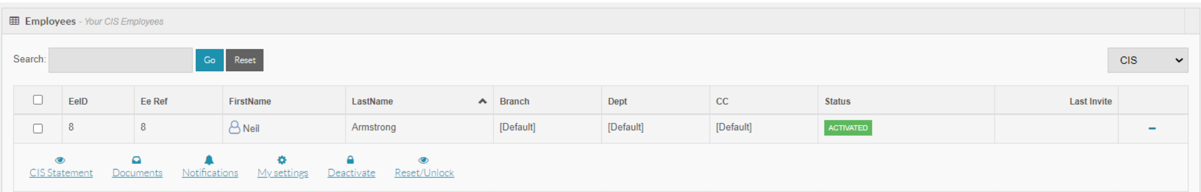
Access to myePayWindow, for leavers shown in this view, will remain open for 15-months after their leave date in line with P11Ds so that Employees have sufficient time to download their payslips and other documents. after a further 1 months their data is automatically removed from myePayWindow. Both the Employee and the Employer will be sent notifications 10-days in advance of the account closure and the Employer is notified when an Employee account is finally closed.

You can manage Employee leavers until their account removal as per 'current' Employees using the actions available.

CIS view



Use the drop-down selector at the top right-hand side of the Employees listing to switch the view to see Employees who have been set as 'CIS' by your Payroll department in the Payroll software application.



The actions for available for CIS Contractors are:

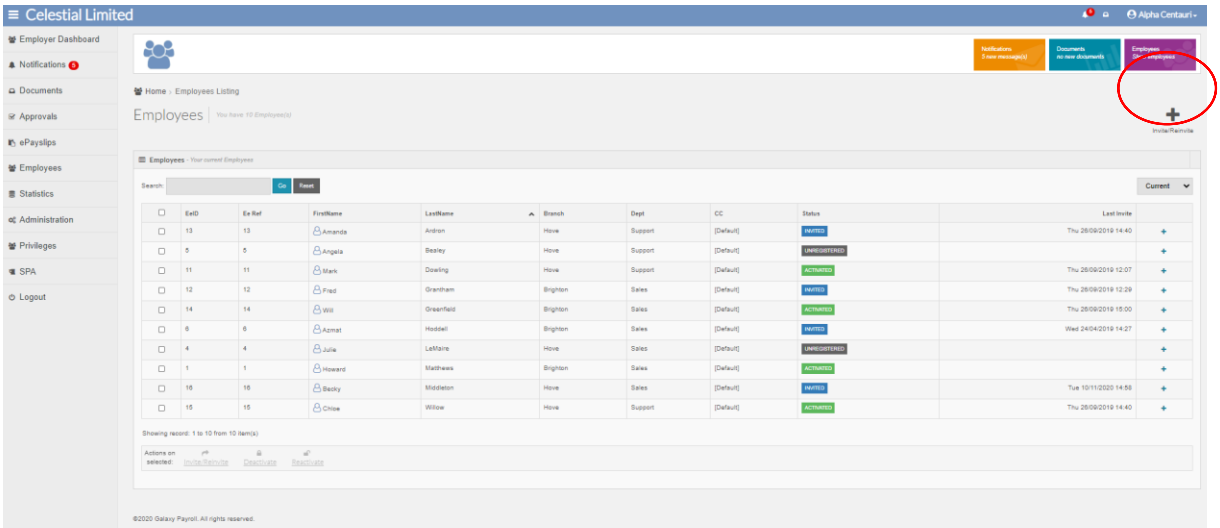
- CIS Statement – view Statements for the selected Contractor
- Documents – view documents that have been sent to a Contractor
- Notifications – see the notifications sent to a Contractor
- My settings – access the CIS settings (see the email address they have used for their Portal account)
- Invite/Re-invite – Send Invitations and re-invitations for CIS Contractors not currently registered
- Deactivate-Reactivate – temporarily deny-reinstate activated CIS Contractors access to the Portal
- Reset memorable word - Send / initiate a reset memorable word email for a specific CIS Contractor
- Reset/Unlock– Send / initiate a reset password/username email for a specific Employee and unlock.

Invite/Reinvite

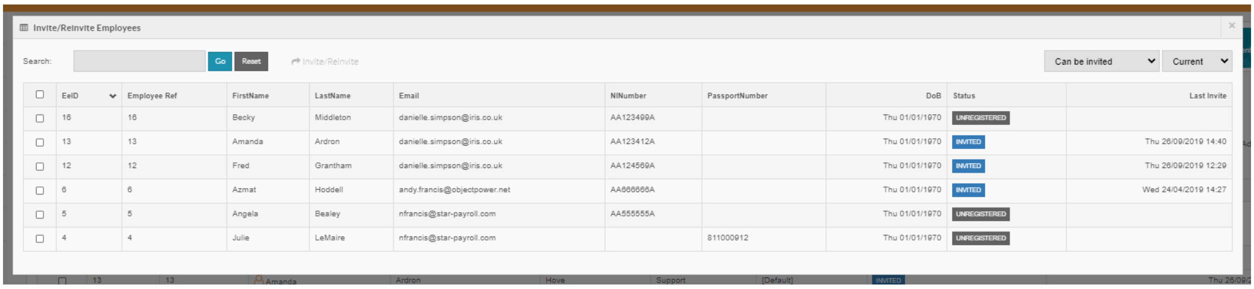
Employer users can Invite/Re-invite multiple employees. This will enable users to view missing employee information.

From the left menu select **Employees**

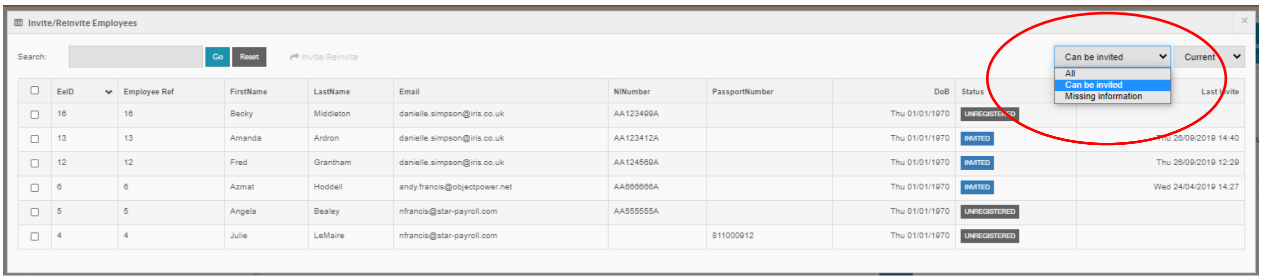
Click on Invite/Re-invite action in the top right corner



A pop up will appear which details the employees that are available to be invited, these will include users that are an unregistered or invited (but not activated) on myePayWindow.

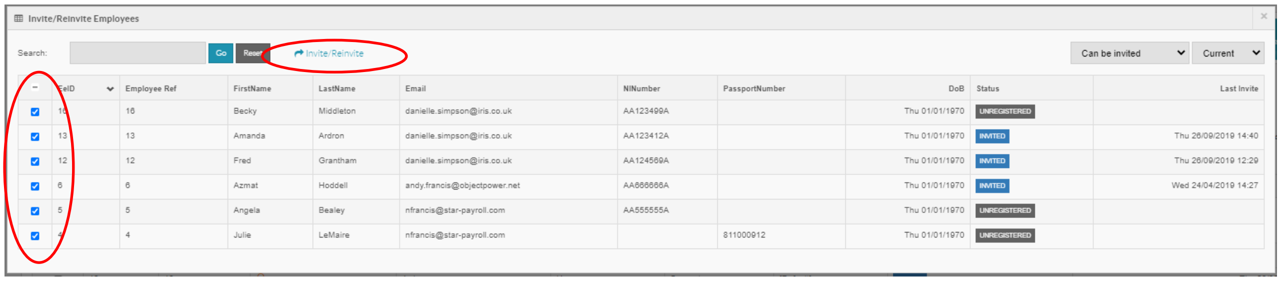


On the top right there are two dropdowns. The first one filters the employees by All, can be Invited or Missing information

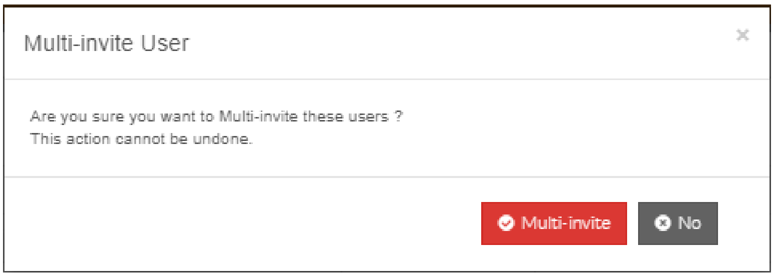


- **All** – All Employees available for invite
- **Can be invited** – These employees have the required information to be successfully invited
- **Missing information** – These employees require further information to be completed before they can be invited. This will usually be an email address, NI number or Passport number.

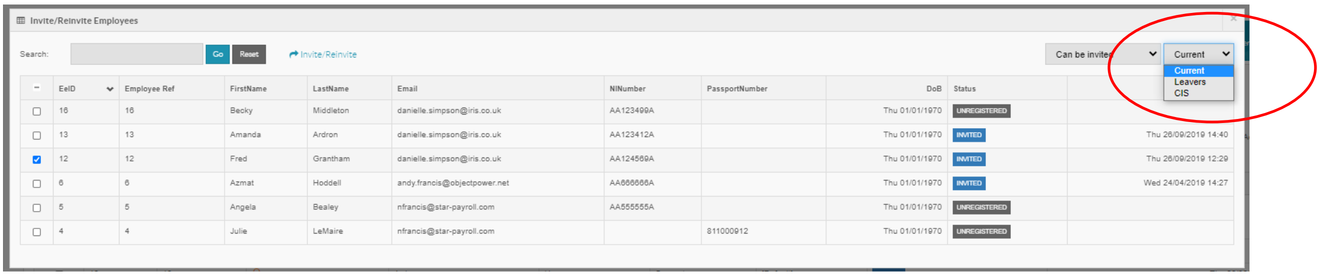
To Invite employees, use the boxes on the left to select individuals or tick the top box to select all
Click on Invite/Reinvite to invite these employees.



Confirm that you would like to multi-invite these employees

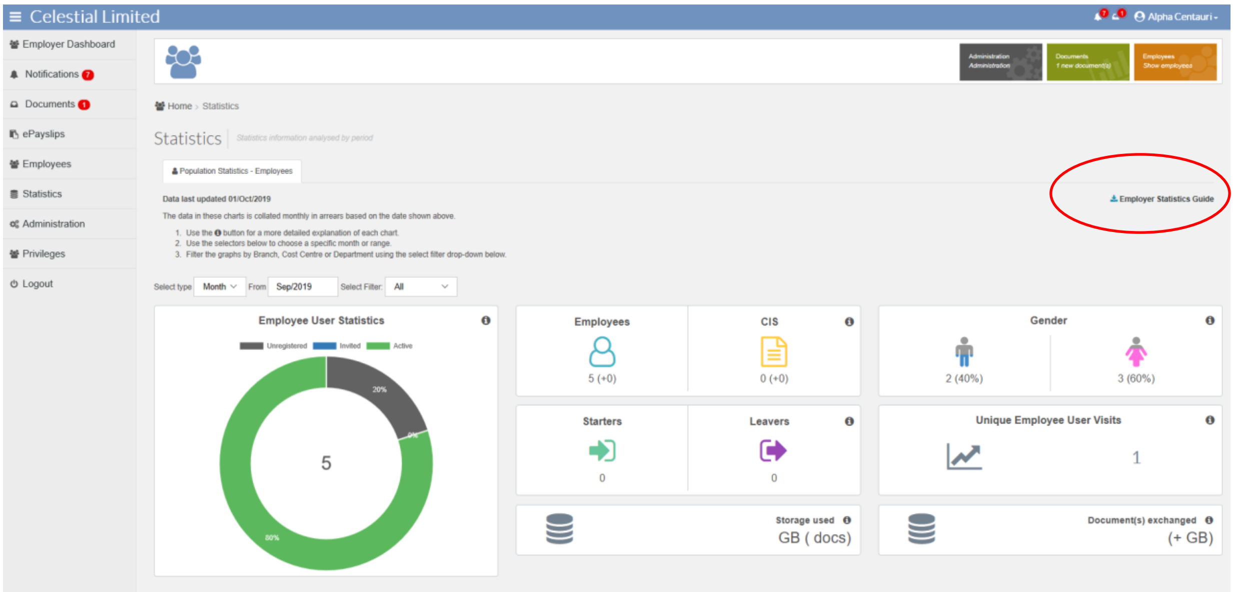


The second dropdown allows you to filter by Current employees, Leavers or CIS.



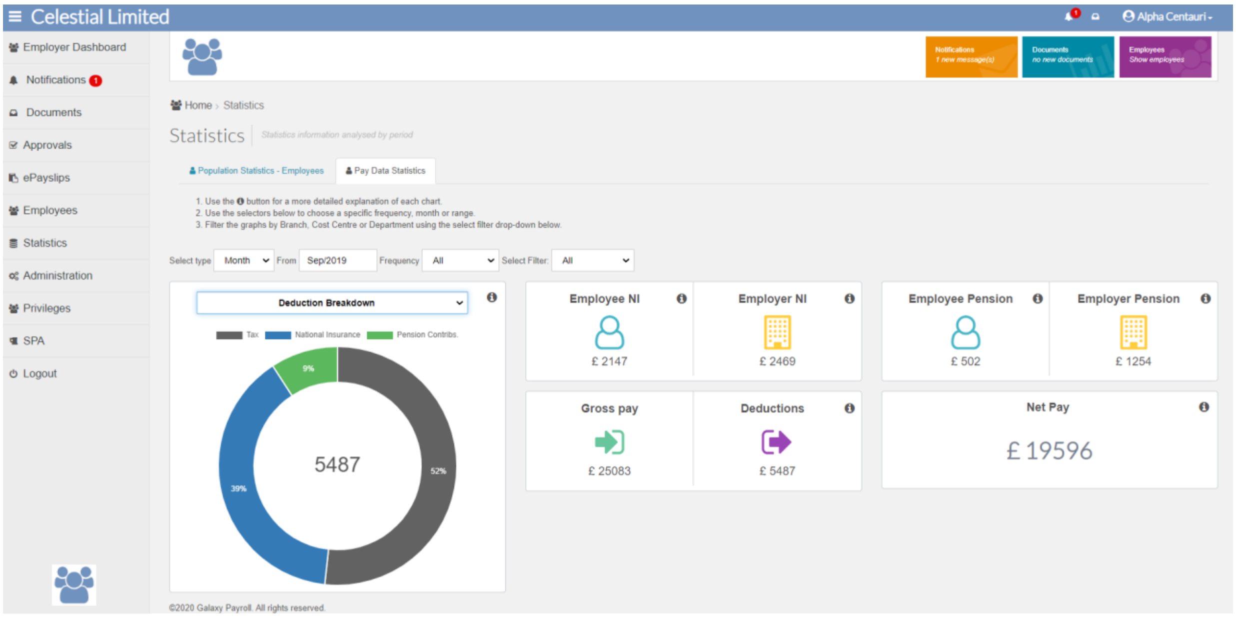
Statistics – Population Statistics – Employees

Please refer to the Employer Statistics Guide located on the Statistics page for further information on the charts available. The user guide is also available on the Customer support website.



Statistics – Pay Data Statistics

Please refer to the Employer Statistics Guide located on the Statistics page for further information on the charts available. The user guide is also available on the Customer support website.



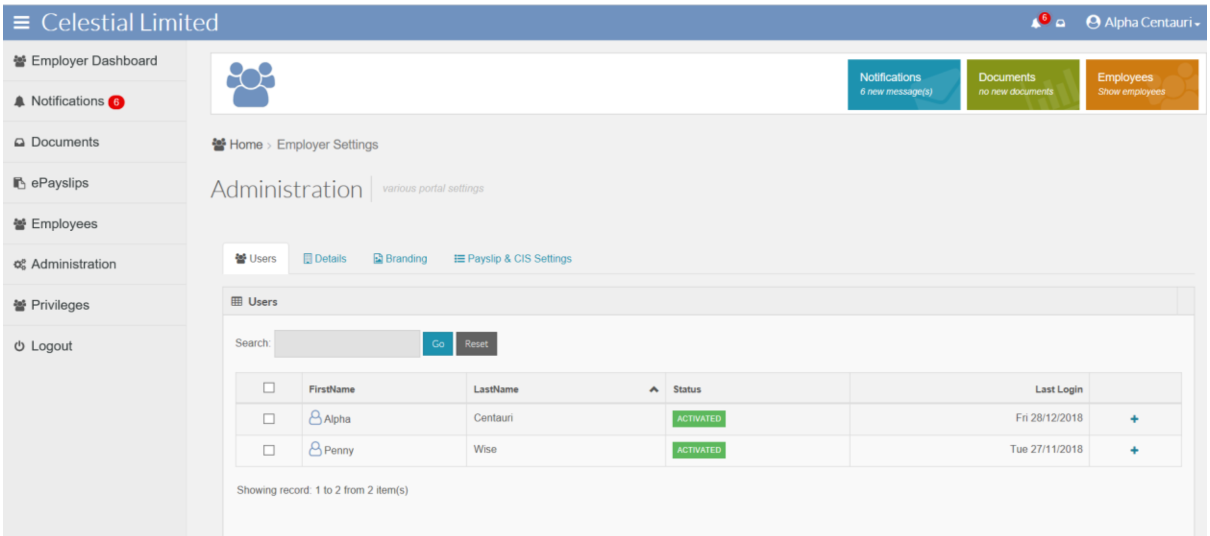
Administration

The Administration page provides access to the following Employer administration functions via the 'tabs':

- Users tab - A list of all the Employer users and their Portal status. These users can be sent reset password or username emails as required. Whilst the deactivate action can be seen here it has no effect as only Payroll department users can deactivate Employer users.
- Details tab - The Employer address details as held in the Payroll application, the default Employer contact and the Payroll department contact address information.
- Branding tab – This is where you can set the Portal colour scheme for you and your Employees and add a company Logo as required.
- Employee Dashboard tab – This is where you can customise your Employees dashboards including creating a broadcast for all employees and setting up useful links.
- Payslip & CIS Settings – From here you can define which items to display on the online payslip view including a payslip company logo if required. You can define what items to display on a CIS Statement.

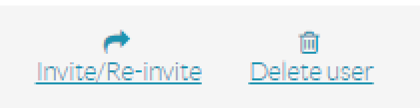
Administration-Users

This tab shows the Employer-level Users connected to the Portal together with their Portal Status.



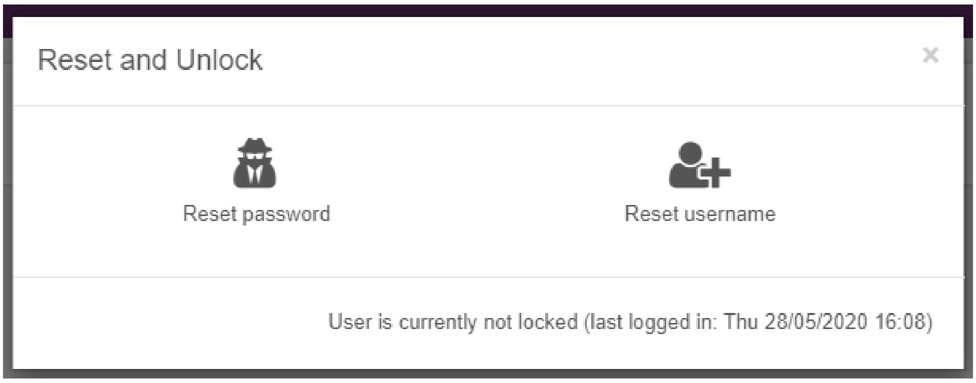
Click anywhere on an Employer user entry, or on the **'+'** button to see the actions available for the individual user – The actions available will vary depending upon the user status:

For Employer users with a status of Invited, Activating, the actions available are as follows:



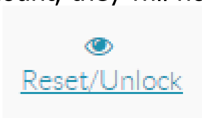
For Employer users with a status of Activated, Deactivated, the actions available are as follows:

- Reset/Unlock – Reset Password – Send a Password reset email to an Employer User/Reset Username – Send a Username reset email to the Employer user - also includes a last login date and time stamp

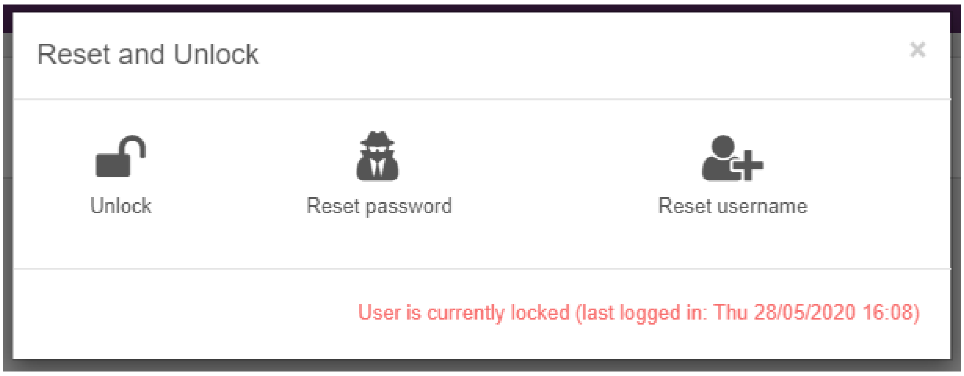


- Deactivate -Reactivate – To deny/reinstate access to an Employer user
- Delete – Delete user.

If a user is locked out of their account, they will no longer show as a red locked status.

To see if a user is locked click on 

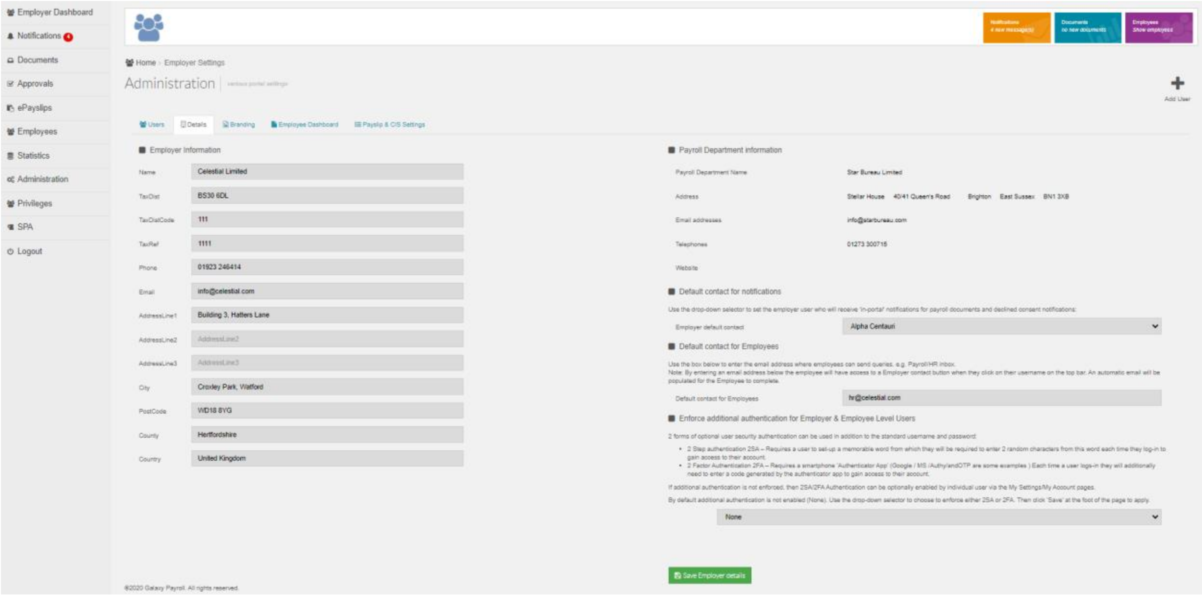
The message in red will advise if the user is locked and the unlock icon will appear.
Click on unlock to reactivate your user.



If an Employer user leaves and they have an activated Portal user account, the user cannot be deleted but their Portal account should be deactivated.

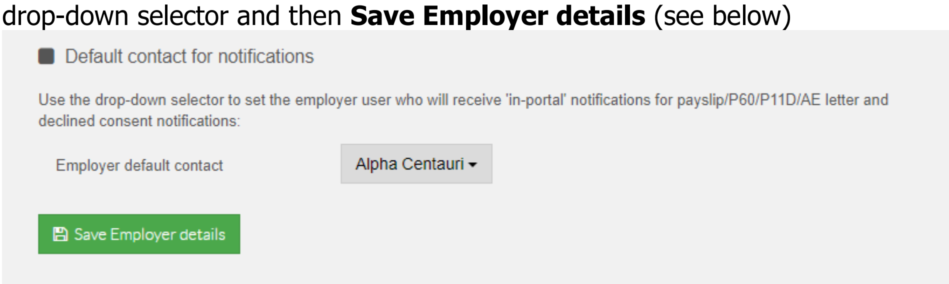
If you attempt to deactivate the Default User, you will receive the following error message.

Administration-Details

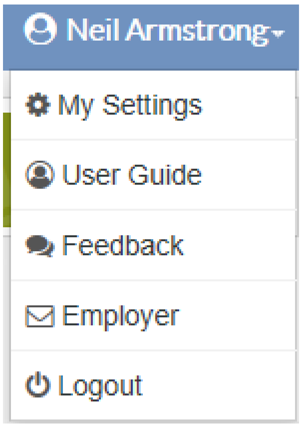


This tab shows:

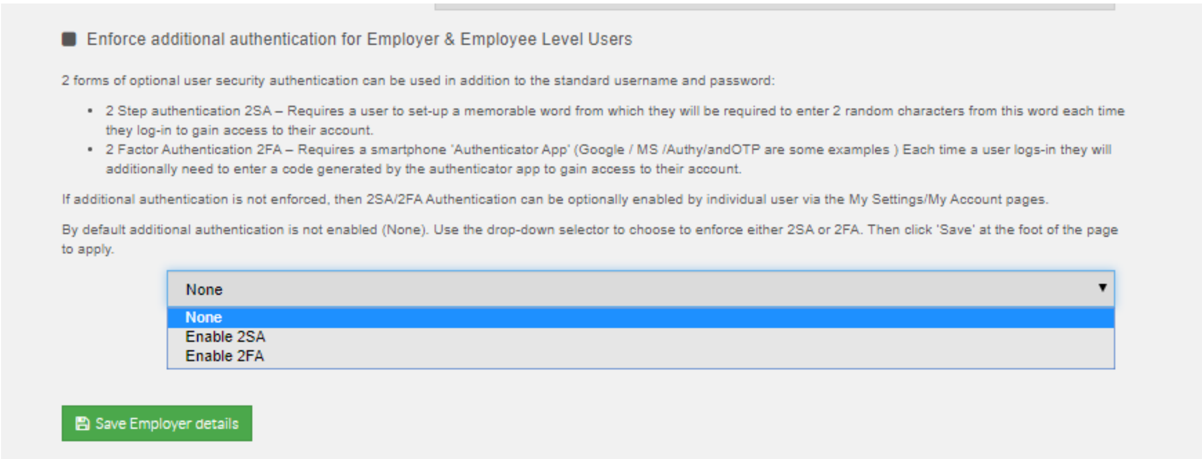
- Employer Information - your (the Employer) company address and contact information as held in the **Payroll Professional** application.
- Payroll Department information – Your Payroll department address details as held in the Payroll application
- Default contact for notifications – Allows you to set the default contact to receive Payslip/P60/P45/CIS Statements and P11D notifications from Payroll Department. Click in the drop-down selector and then **Save Employer details** (see below)



- Default contact for Employees – Allows you to set the default contact (email) where employees can send queries e.g. payroll/HR inbox. By entering an email address here, the employee will have access to an Employer contact button when they click on their username on the top bar.

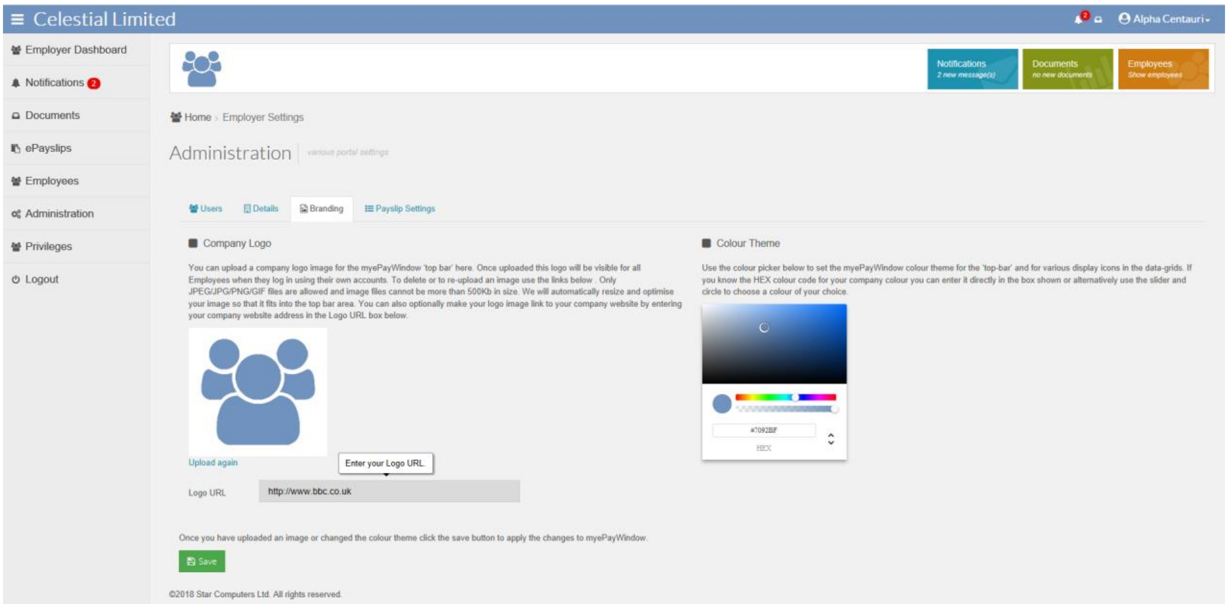


- Enforce 2 Step Authentication for Employer & Employee Level Users – Provides additional security for your Employer & Employee users. The user can choose to enable 2SA/2FA via My Settings/ My account pages. Tick Enable 2SA/2FA and then **Save Employer details** (see below) for more information see Additional Authentication (Page 9)



Administration-Branding

From this page the colour of the Portal's 'Top-bar' and the icons in the Notifications, Documents, and Employee listings can be set to match with your company branding. A Logo and a Logo URL can also be added. The Logo URL will allow a website link to be set so that when a user clicks on the Logo it will take them to the company's website (or another site of your choice).



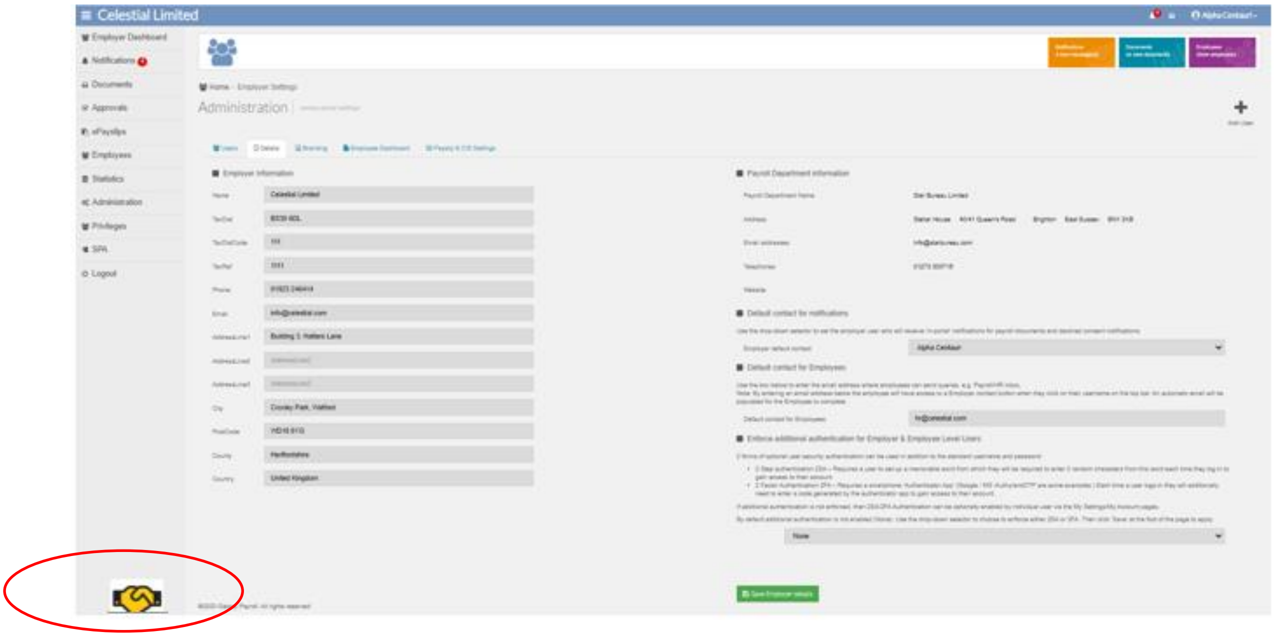
Company Logo – drag or click in the blue area to upload a logo image to the Portal, images cannot be larger than 500kb in size and will automatically be resized. Click upload again to replace an existing logo image.

Colour theme – use the slider or colour pane or enter a HEX / RGB / HSL colour code. Note: Depending on the web browser you are using; you may be able to add a browser tool that will allow you to find out the colour code used on an existing website page element. If you do this, you will be able to match exactly the Portal with colour of your own website.

Logo URL - Type a URL here that can be followed when users click your logo image.

Click **Save**, to apply the Logo to the Portal and your chosen colour setting.

Note: If the Payroll department has selected the option to show their Payroll department Logo on Employers left menu, the logo will show as below.

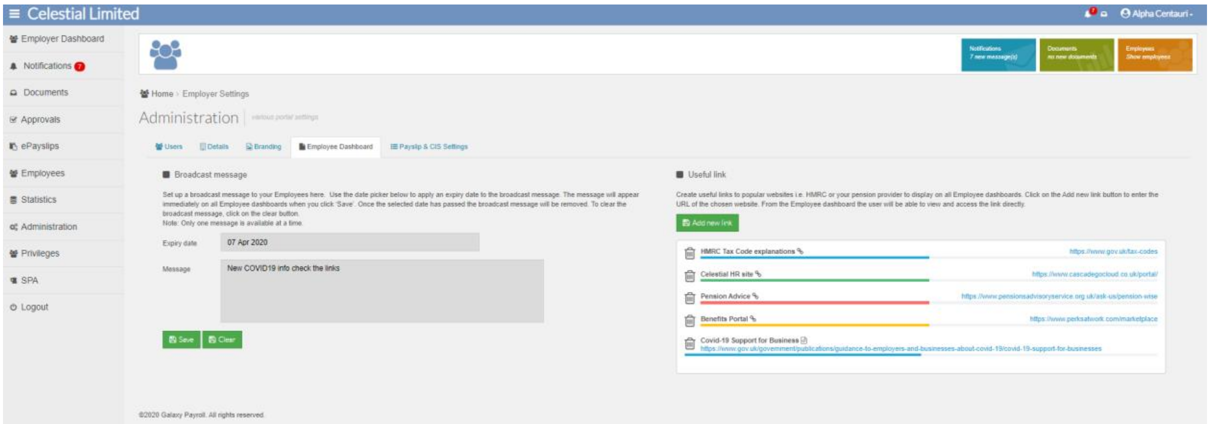


Administration-Employee Dashboard – Broadcast Message

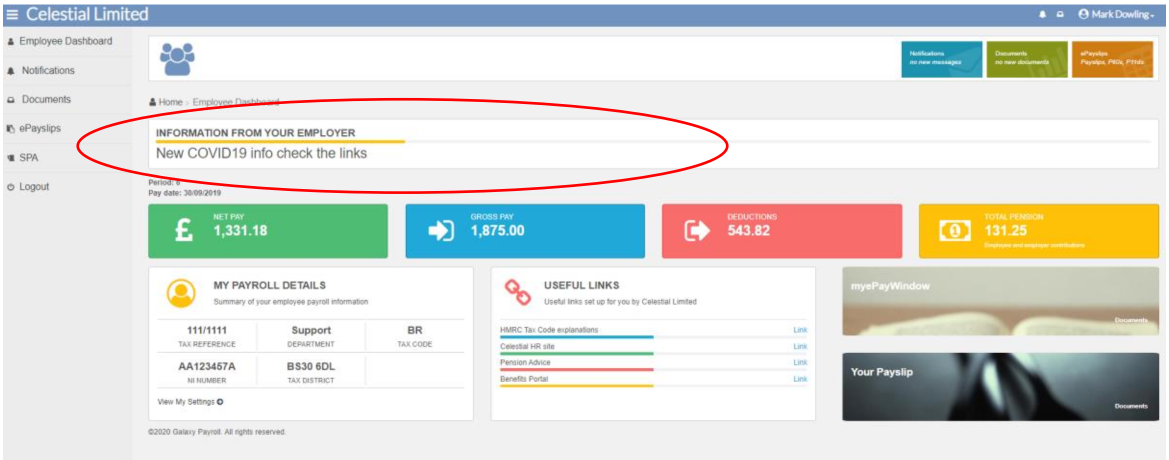
From this page a Broadcast Message & Useful links can be created to show on the employee dashboard.

Navigate to **Administration/Employer Dashboard**.

Use the date picker below to apply an expiry date to the broadcast message. Enter the message text (a maximum of 500 characters). Click save.   This broadcast message will show immediately on all your 'Employee' dashboards. Only one message can be displayed at a time. A message remains on display until it is replaced, removed or the date expires. If you wish to remove the message you will need to click on clear and then 'save' and the message will be removed from the Employee dashboard.

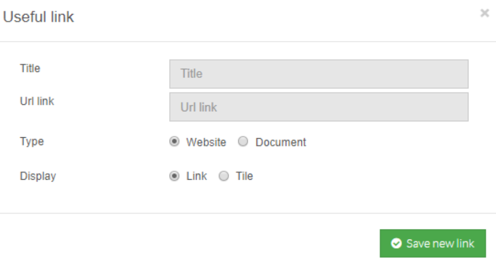


The broadcast message will display as below on the Employee Dashboard:-



Administration-Employee Dashboard – Useful Links

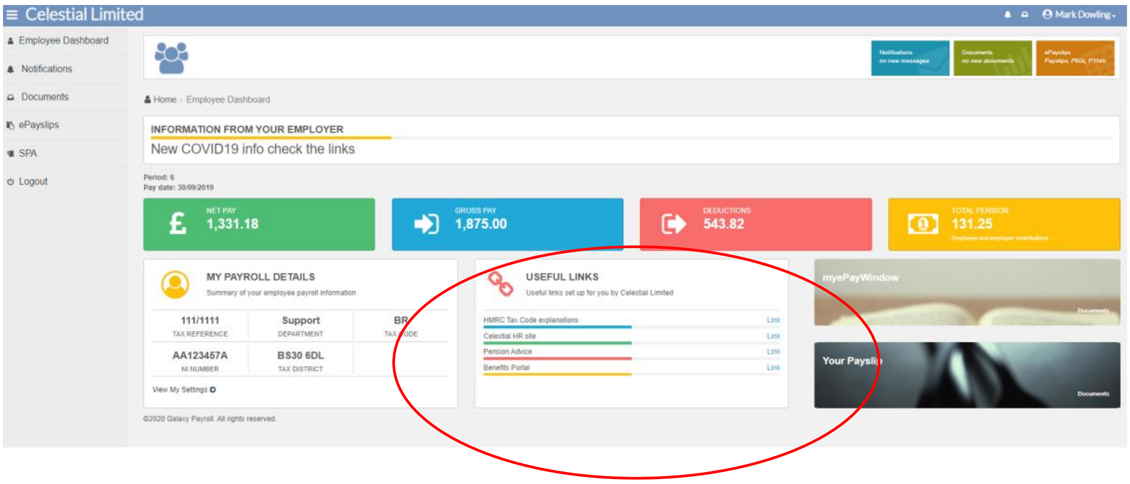
Navigate to **Administration/Employee Dashboard.** Click on the add new link button



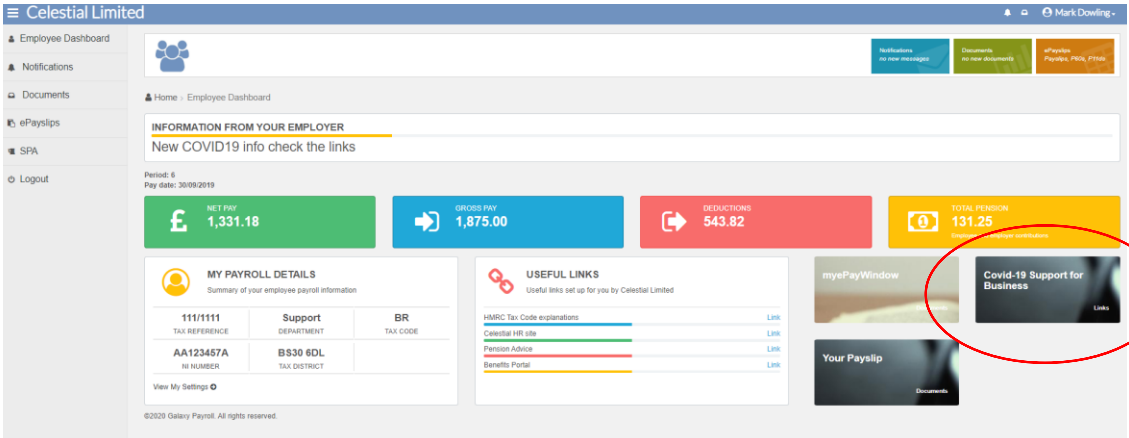
1. Enter the Title of the useful link e.g. HMRC
2. Enter the URL of the website or Document
3. Choose whether you would like the website shown as a link or a tile on the dashboard

Click on Save new link

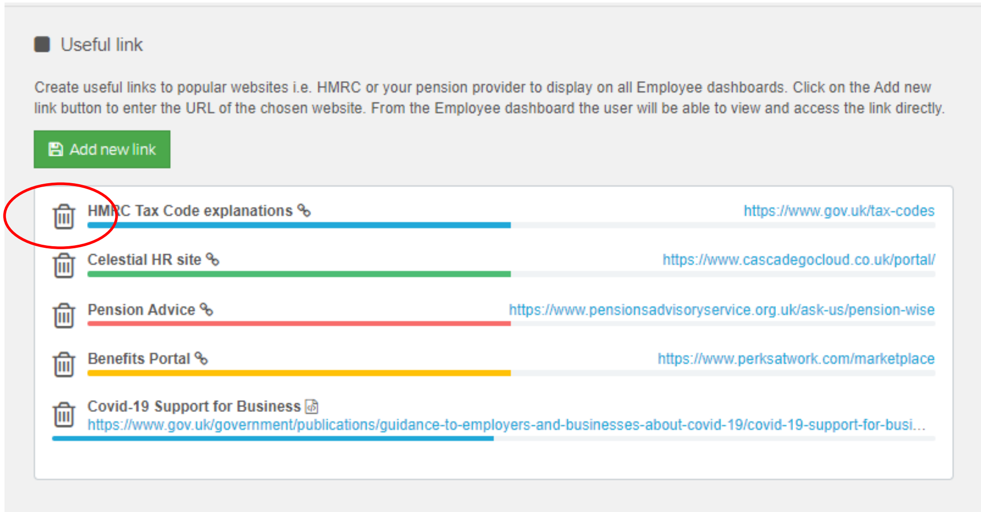
The useful link has been created on the Employee dashboard. You can create as many useful links as you like, however we recommend that create 5-8 Useful links and two tiles on the dashboard.



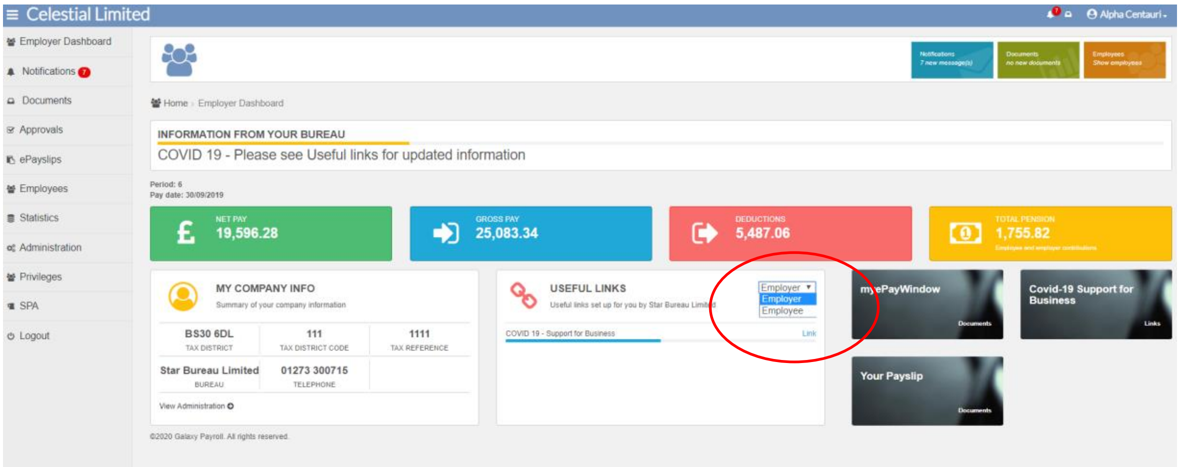
Below shows an example of a useful link as a tile.



To delete a useful link, navigate to **Administration/Employee Dashboard** and click on the bin icon. This will remove the link from the Employee dashboard.



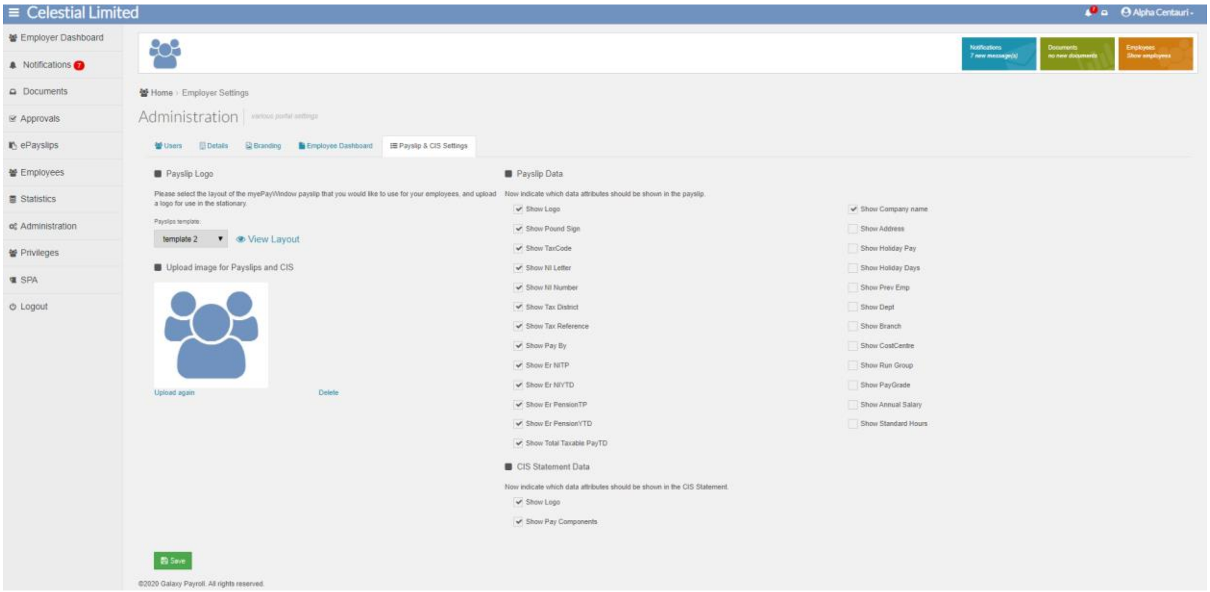
From the **Employer dashboard** you can switch the view from your Employer Useful links (set up by the Payroll department) and the view from the Employee useful links (set up by the employer). Use the dropdown box to choose the view.



Administration-Payslip Settings

Employer users can set the company logo to appear on the online payslip views and those details to include on the payslip. Click **Save** to apply the changes.

- Payslip Template - This drop-down allows different online Payslip templates to be used. Currently, there are 2 templates available. Template 1 is the default if this is not set. Click on the View Layout button to see a preview of the templates.
- Payslip data - Online Payslip settings, the most frequently used options for the templates are defaulted to display for convenience. Add/remove check marks as required.
- Upload images - Click in the logo box to upload an initial Logo to appear on Payslips views – use ‘Upload again’ to replace with a different logo.
- CIS Statement Data – Click on Show Logo to show the logo on CIS Statements, click on show Pay Component to show page 2 on the CIS statement.



Employer Level Privileges

The Privileges page provides access to the following Employer functions:

- Employee Groups tab - Create New Employee Group(s) and add Employees based on the Analysis group in Payroll Professional (Branch, Cost Centre or Department).
- Roles-privileges tab - set-up new access Role(s) with appropriate privileges
- Groups-Roles-Users tab - add the required Role(s) to each Employee Group(s) and add the Employer Users to each Role (remove them from the Full Access Role as required).

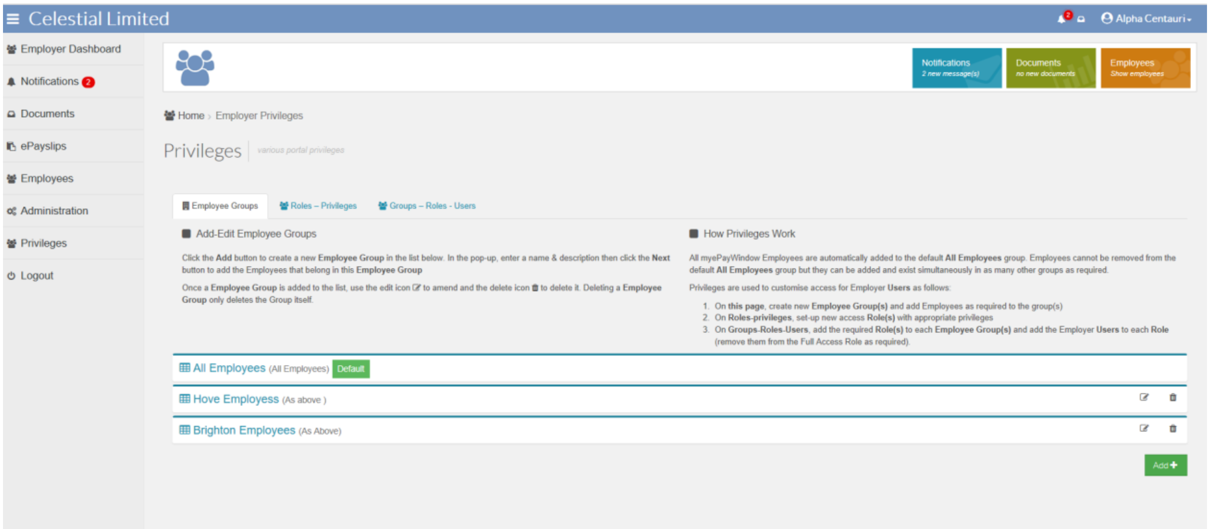
Employer level privileges can be set-up either by an Employer level user or alternatively, a Payroll department level user, with the appropriate permissions, can do this on the Employer's behalf. Employer level privileges do not need to be used but any new Employer users added from now onwards will need to be assigned required access permissions (see below).

Existing Employer Users

Existing Employer Users are automatically added to the default Full Access Role with full access privileges to all Employees.

New Employer Users

When you add a new Employer user, they will have no access until they are added to Roles in the various Employee Groups.



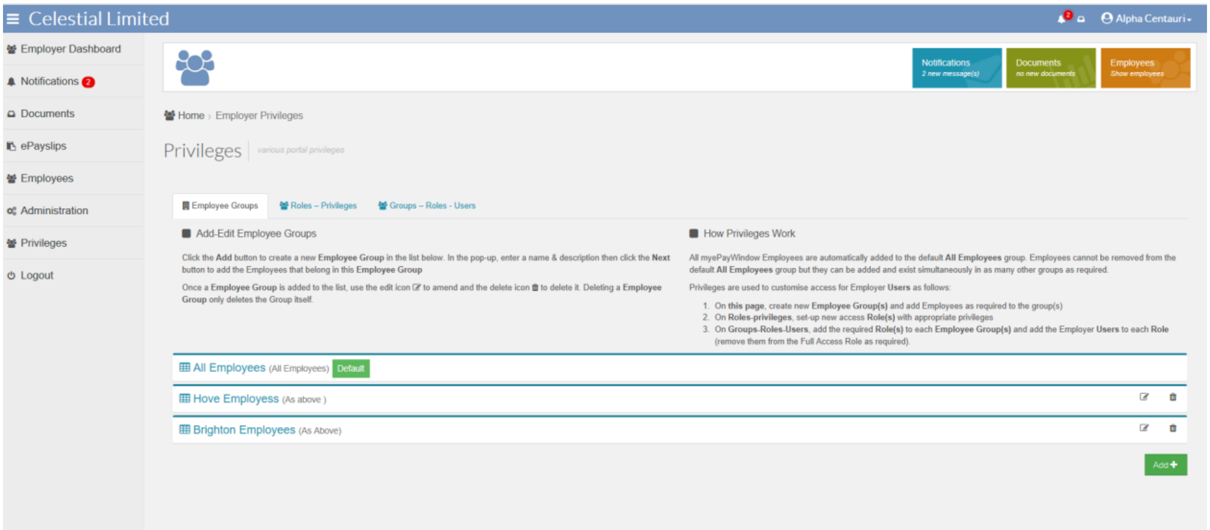
Notes: Depending on the Role an Employer User belongs to, access to the Privileges page may be restricted or unavailable.

You do not need to use Employer Privileges but please read this section carefully to ensure how Privileges impact myePayWindow operation.

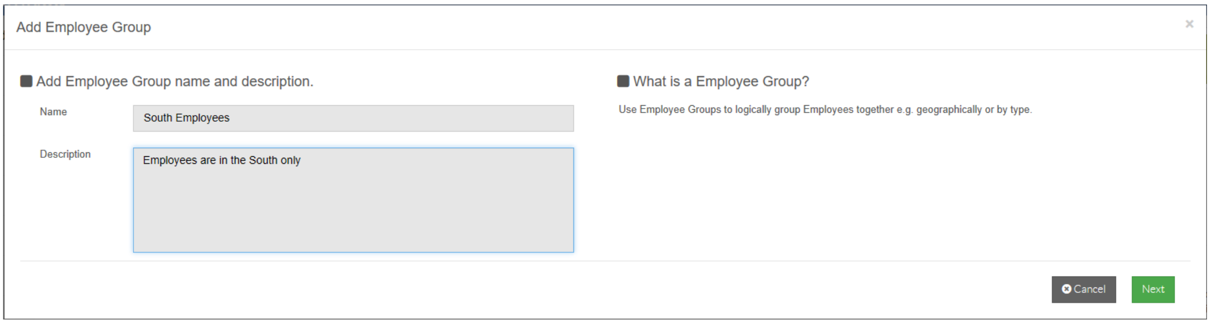
Step 1 - Create a new Employee Group (s)

From the Privileges - Employee Groups page, you can create a logical Employee group and add Employees to it.

Note: All myePayWindow Employees are automatically added to the default All Employees group. Employees cannot be removed from the default All Employees group, but they can be added and exist simultaneously in as many other groups as required.



Click the Add button at the bottom of the Employee Group listing to Add a **Group** (to edit or delete a Group use the Icons per Group in the listing).



You must enter an Employee Group Name (100 Characters) and provide a description (500 Characters).

Add Employees (by analysis group) to the Employee Group(s)

Use the alpha/numeric filters or use the search box, then click the Branch, Cost Centre or Department name(s) (to highlight in green) to add to the Employee group. You can Click the 'Yes' button in the select All Data section to add All Employees to the group.

Note: When you choose 'Select All Data' a group entry called 'All Data' is automatically included in the Employee Members section and not individual Employees names.

To remove individual Employees from the Group, click the waste-bin Icon in the Employee Members section of the screen.

When you have chosen all the Employees for this Group, Click Save to apply.

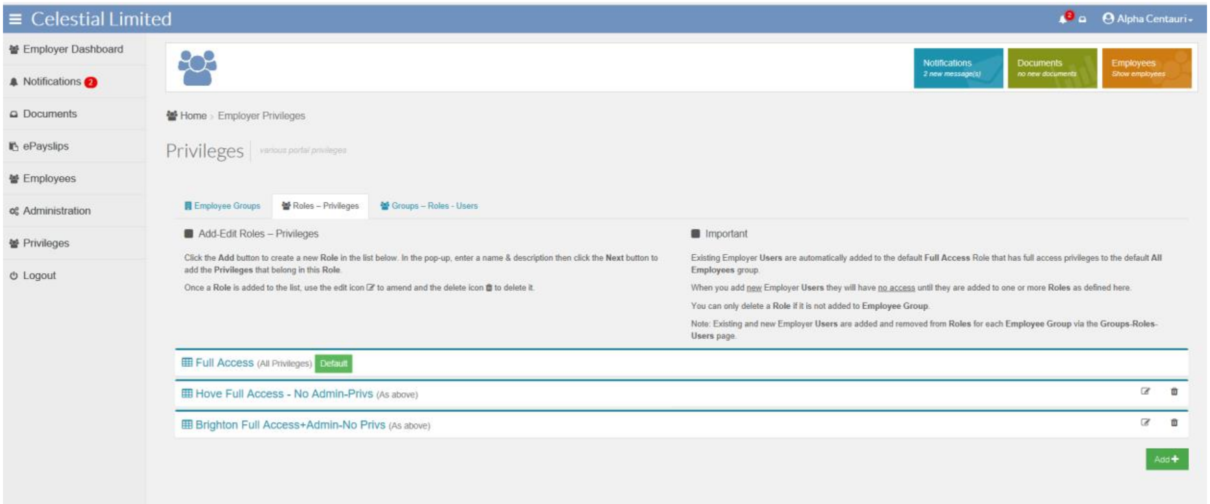
Step 2 Create Roles – Privileges

On the Privileges - Role–privileges page create a **Role** and add **Privileges** to it:

Notes: Existing Employer Users are automatically added to the default Full Access Role that has full access privileges to the default All Employees group.

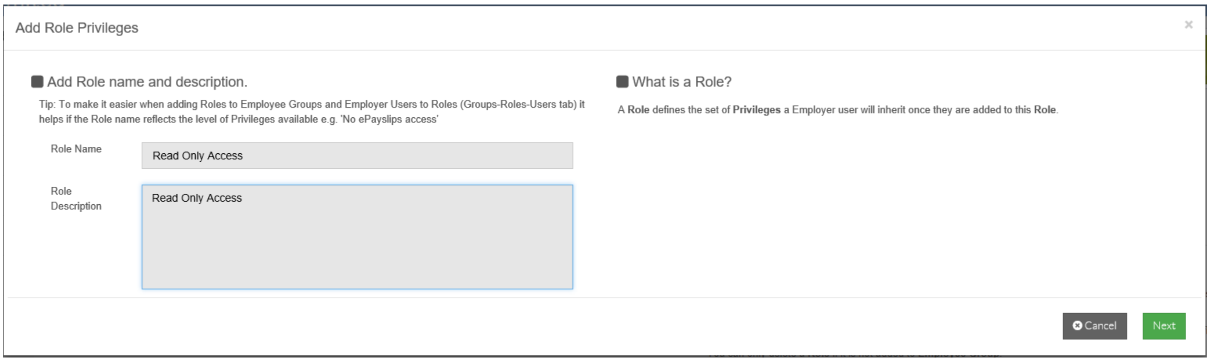
When you add new Employer Users, they will have no access until they are added to one or more Roles as defined here.

You can only delete a Role if it is not added to an Employee Group.



Click the Add button at the bottom of the Roles listing to Add a **Role** (to edit or delete a role use the Icons per Role in the listing).

You must enter a Role Name (100 Characters) and provide a description (500 Characters).

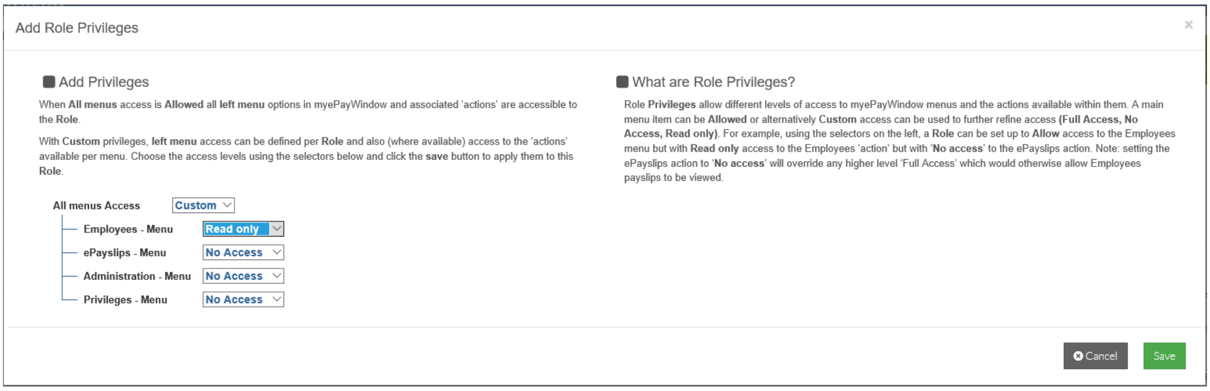


Click next to Add Role Privileges…

Add Role **Privileges**

Role Privileges allow different levels of access to myePayWindow menus and the actions available within them. **All** main menu item can be **Allowed,** or alternatively **Custom** access can be used to refine access to the individual menus as required **(Full Access, No Access, Read only)**. For example, using the selectors on the left below, this **Role** can be set up with **Read only** access to the Employees menu, '**No access**es to the ePayslips, Administration and Privileges menu. Note: setting the ePayslips menu to '**No access**' will override any higher level '**Full Access**' which would otherwise allow Employees payslips to be viewed. Therefore, in this example, a user in this role will have no access to the ePayslips left menu, will be able to see a list of Employees but will be unable to invite/re invite or deactivate/activate Employee accounts. Further, the ePayslips 'action' for an Employee will be disabled.

Choose the access levels using the selectors below, click save to apply.



Step 3 – Add Roles and users to Employee Groups

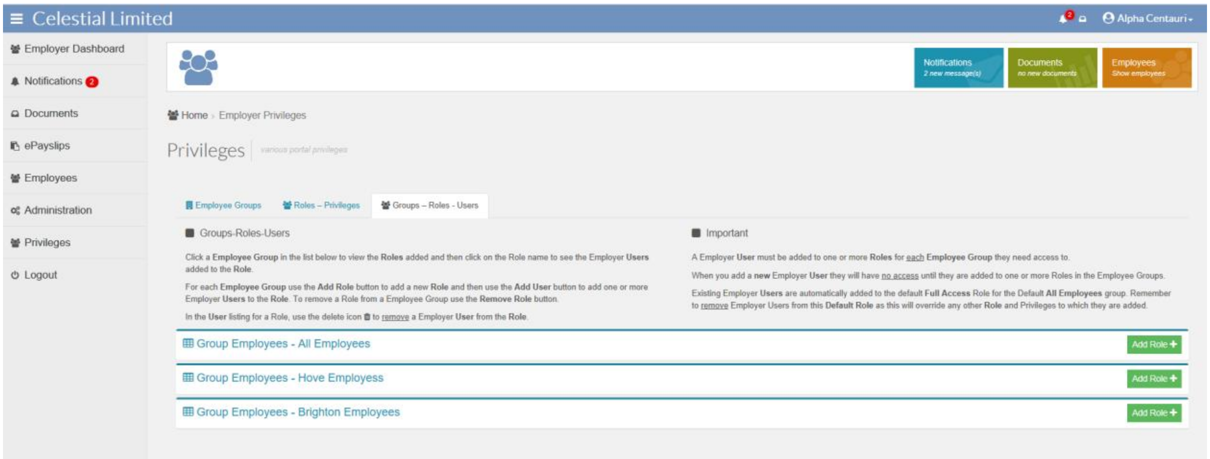
The final step is to add **Roles** to **Employee Groups** and Employer **Users** to the Roles as required.

Notes: An Employer User must be added to one or more Roles in each Employee Group they need access to.

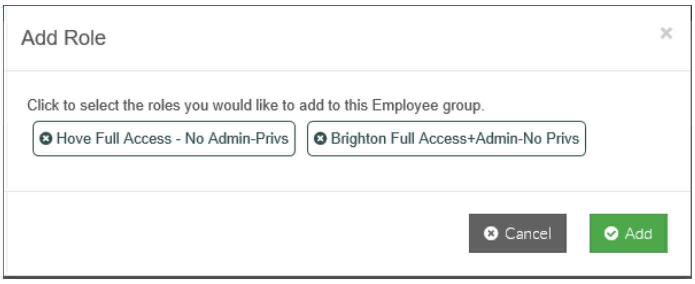
When you add a new Employer User, they will have no access until they are added to one or more Roles in the Employee Groups.

Existing Employer Users are automatically added to the default Full Access Role for the Default All Employees group. Remember to remove Employer Users from this Default Role as this will override any other Role and Privileges to which they are added.

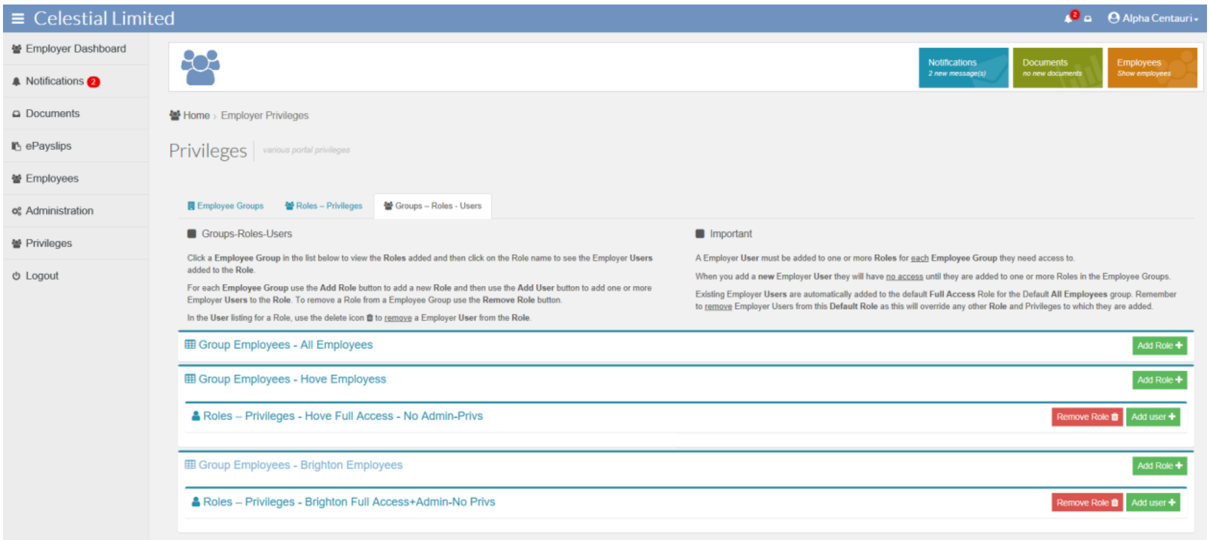
For the required Employee Group in the listing click the Add Role button.



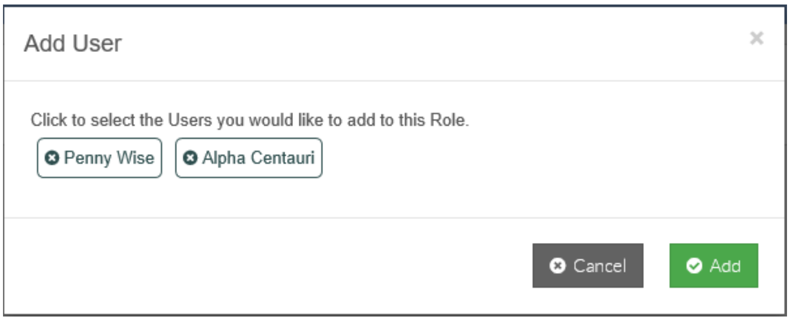
Select the roles you would like to add to the Employee Group. Click on Add.



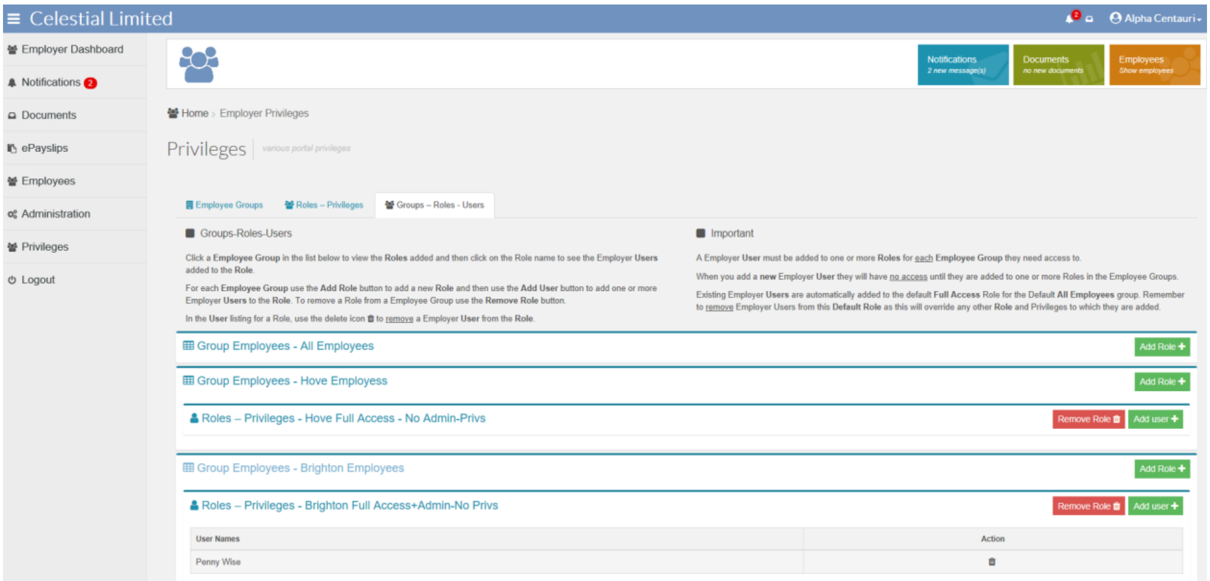
Click on the Add User button or the Remove Role Button to delete the Role.



Select the users you would like to add to the Role. Click on Add.



Use the waste-bin icon to delete users from the role.



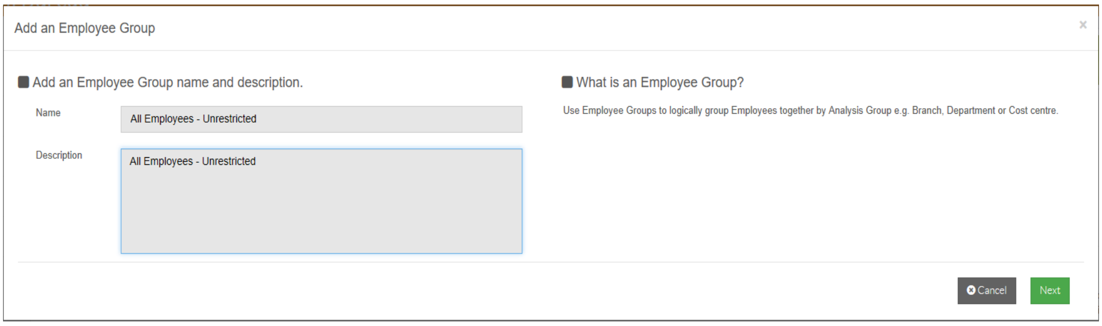
Privileges - Best practice

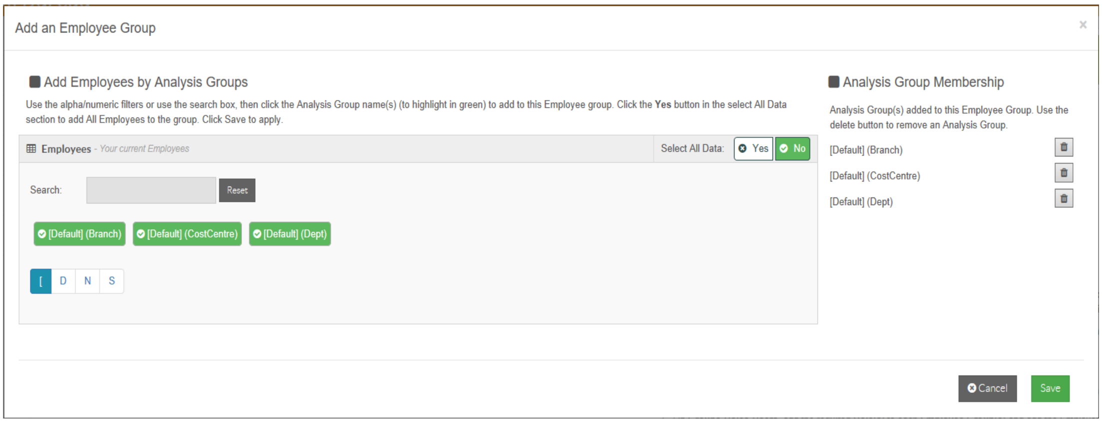
Once you start using Privileges to restrict access to one or more Employee Groups it is good practice to:

1. Create an alternative 'All Employees - Unrestricted' Employee Group and add all Employees to this by Analysis Group (not as 'All Data).
2. Create an alternative 'Employer Full Access' Role without Administration and Privileges access.
3. Add the 'Employer Full Access' Role to the 'All Employees - Unrestricted' Employee Group and add the majority of Employer Users to this role (see 4 below).
4. Leave your Employer Administrator in the default Full access role and default 'All Employees Group' and remove all other Employer Users – so your 'Super' or 'Admin' user retains Full access to everything.

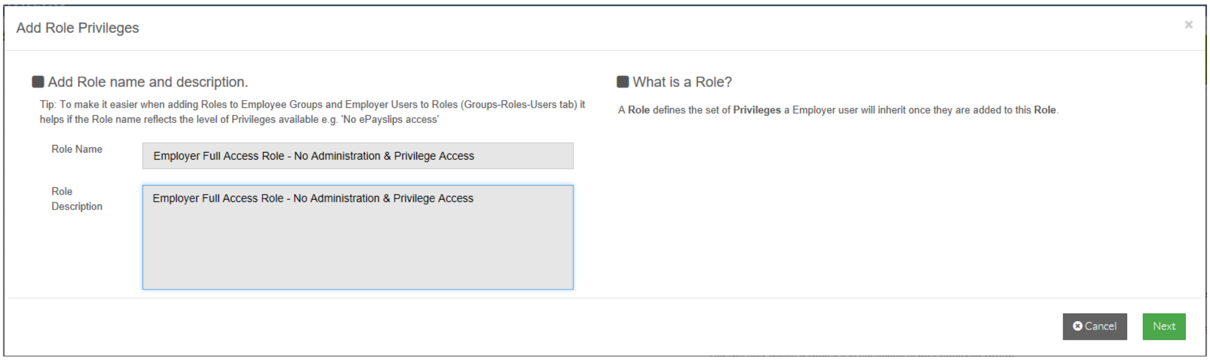
Step-by-step:

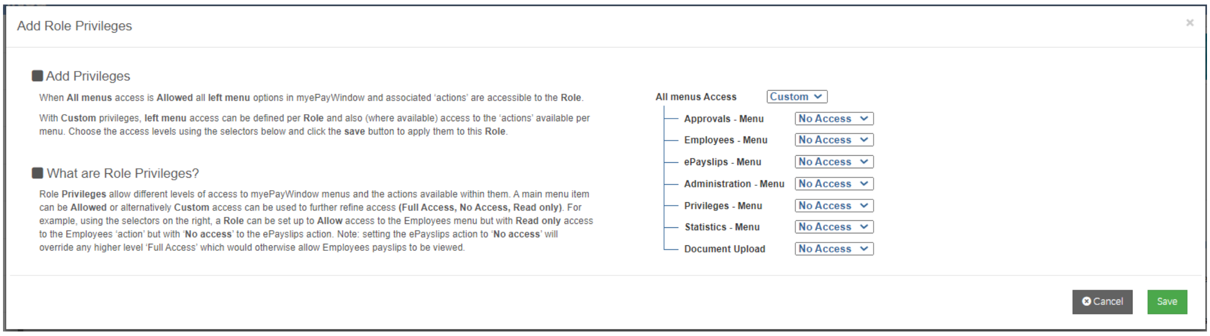
Step 1 – Add 'All Employees – Unrestricted' Employee Group.



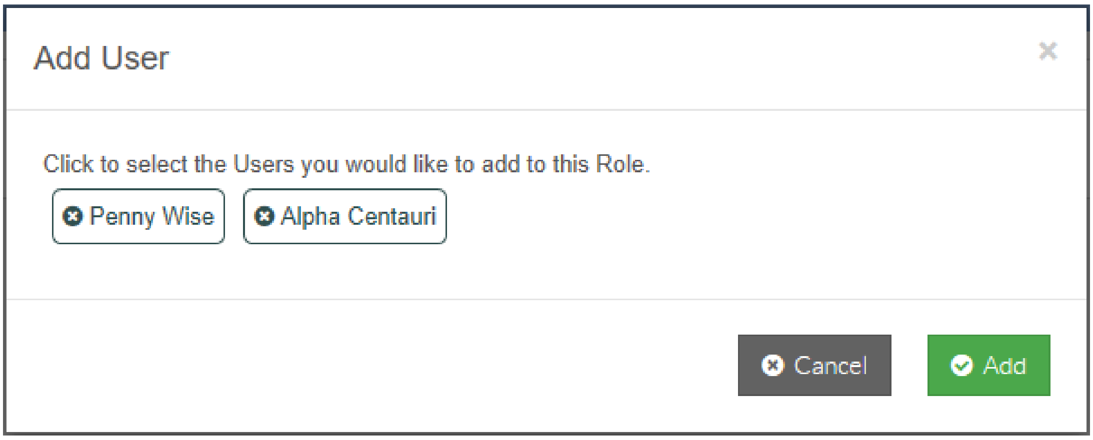


Step 2 – Add 'Employer Full Access' Role-Privilege.

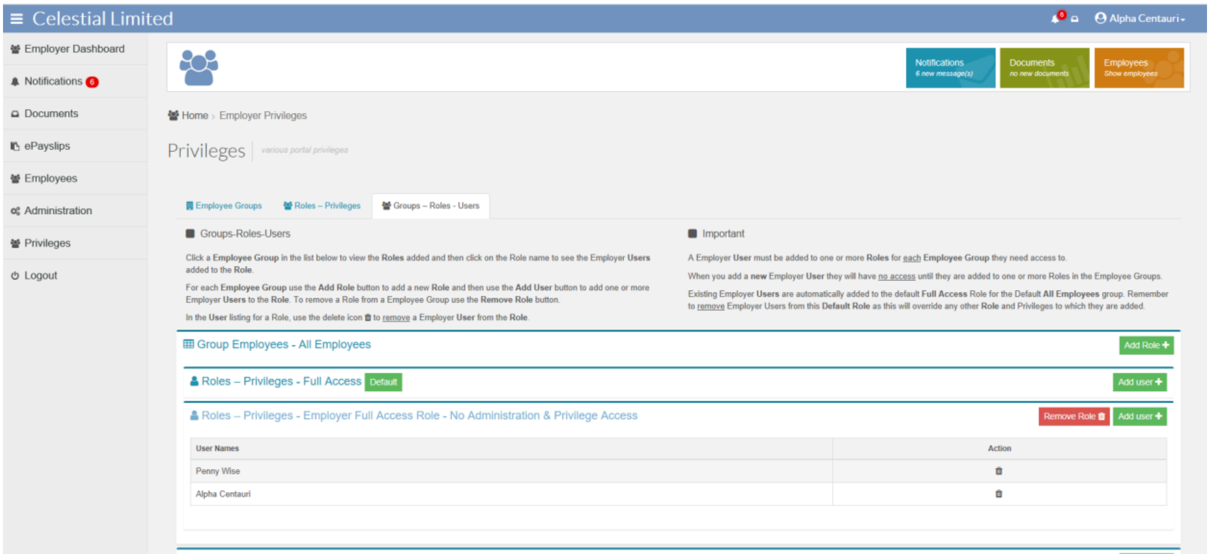




Step 3 – Add Employer 'Full Access Role' to 'All Employees Unrestricted' and Add Employer Users.



Step 4 – Remove all other Employer Users from Default All Employees Group – leave 'Super' User in Default Full Access Role.



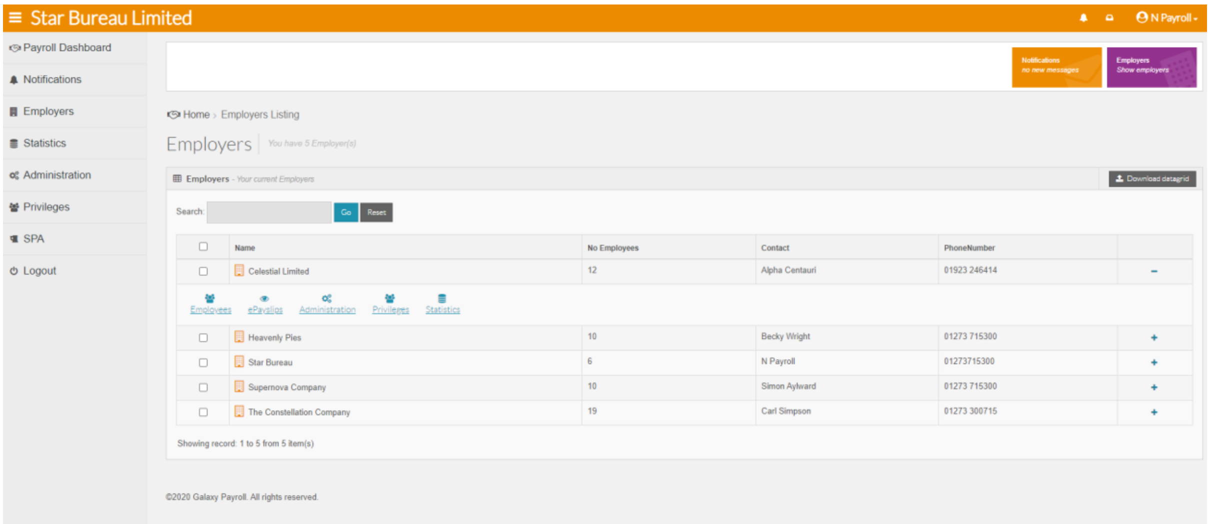
Note: from V13 U1-2021 a Document only privilege will be available.

Note: Please remember any new Employer Users will have no privileges assigned by default so you will need to add them to a Role for them to have access to any Employees.

Employer Privileges set from Payroll Department Level

Employer Privileges can be set through the Payroll department user.

Click on Employers, select the Employer and click on Privileges.



The Employer Privileges pages will be accessible. Follow steps 1-3 as above.

My Settings

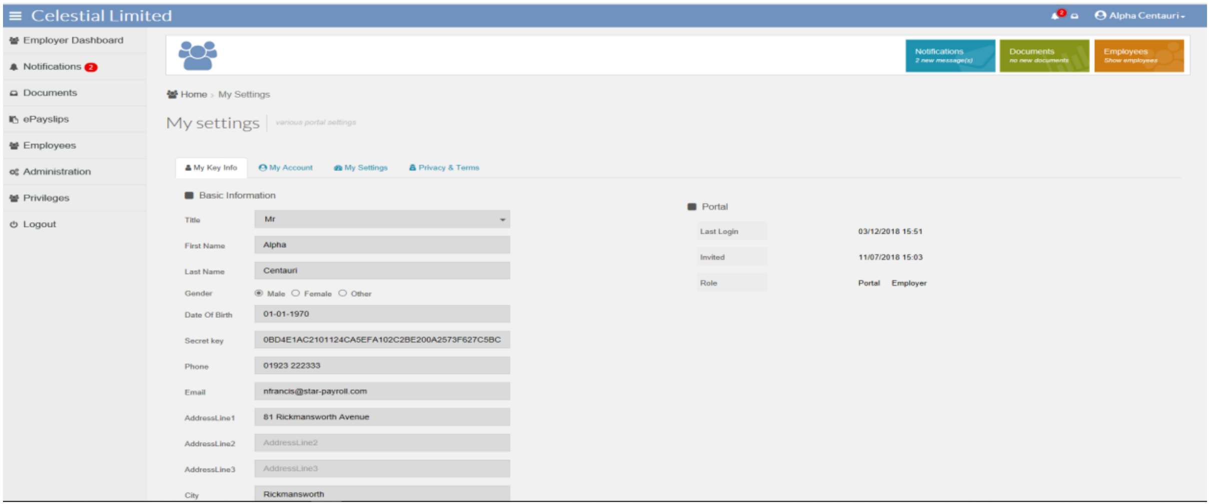
The My Settings page contains various tabs concerning your individual Portal user settings and details. These features will be extended in future releases:

- My Key Info
- My Account
- My Settings
- Privacy & Terms

My Settings - My Key Info

- My Key Info – Your (The Employer) details as held in the Payroll Professional application and your last Portal login date, the date you were invited to join the Portal and your Portal 'role'.

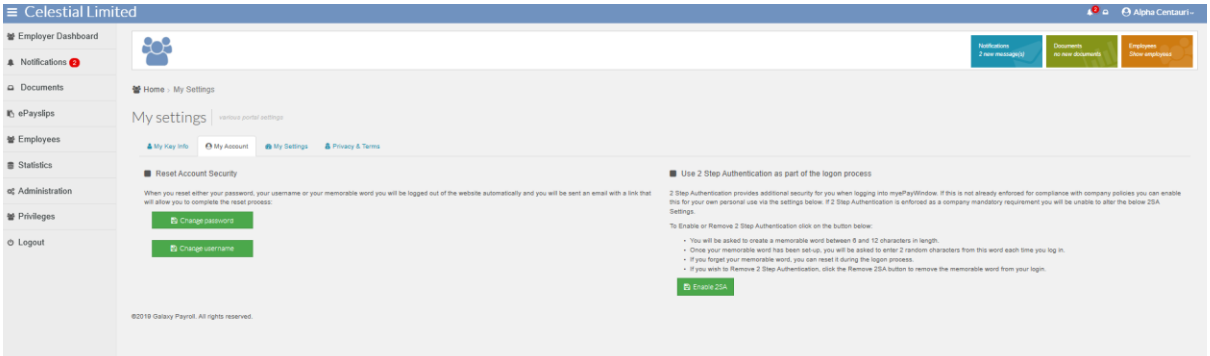
Note: You are unable to edit these fields. Any Data changes required here must be made in Payroll Professional and updated from there via Data/myePaywindow.



My Settings - My Account

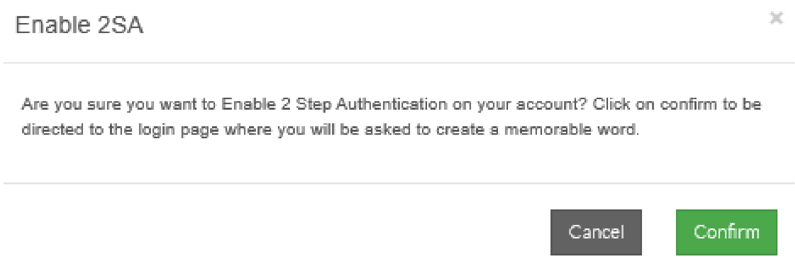
- Change password – On clicking this you will be logged out immediately and an email will be sent to your registered portal email address (the address held by your Payroll department and to which your Portal invitation was sent). The email will contain a link to reset your password. You will be required to verify your identity so have a previous payslip to hand.
- Change username – On clicking this you will be asked to confirm your registered portal email address (the address held by your Payroll department and to which your Portal invitation was sent) you will then be logged out and an email will be sent to this registered portal email address. The email will contain a link to reset your username. You will be required to verify your identity so have your verification details to hand.
- Enable 2 Step or 2 Factor Authentication on your account – this provides additional security for you when logging into myePayWindow. If 2SA/2FA is enforced at a company level, you will not be able to edit the settings here.

Click **Change password or Change username**, to start the reset process.

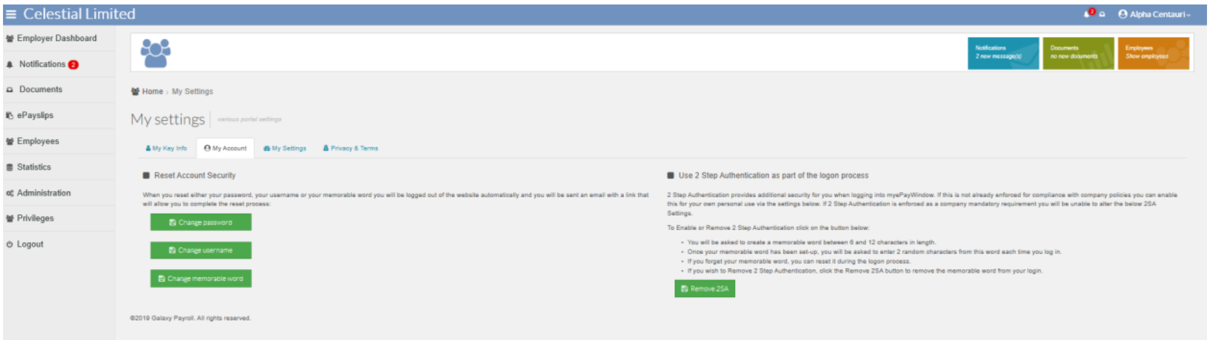


Enable 2 Step Authentication

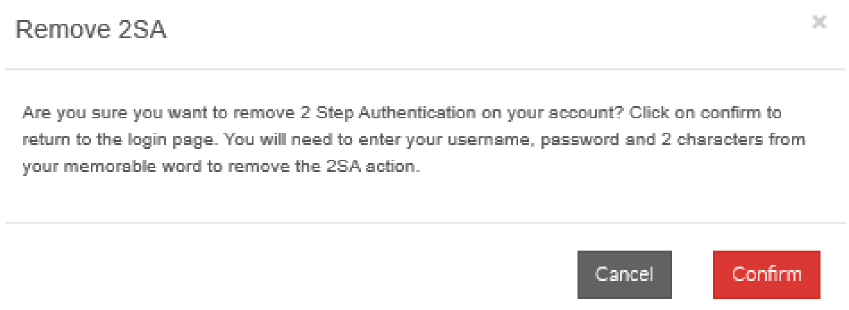
2 Step authentication 2SA – Requires a user to set-up a memorable word from which they will be required to enter 2 random characters from this word each time they log-in to gain access to their account.



If you have 2SA Enabled, you will see a **Change Memorable word** button, click on this to change your memorable word.



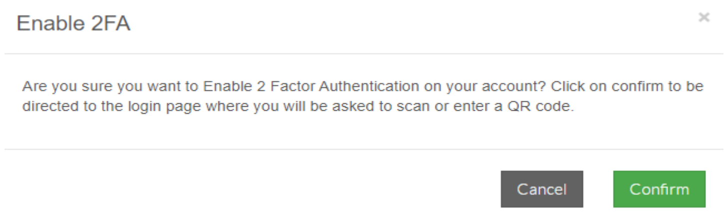
Click on the **Remove 2SA** button to remove 2SA, you will no longer be prompted for 2 random words from your memorable word when you log in.



Note: If 2SA is enforced at a company level you will be unable to change the settings at a personal level here.

Enable 2 Factor Authentication

2 Factor Authentication 2FA – Requires a smartphone 'Authenticator App' (Google / MS /Authy/andOTP are some examples) Each time a user logs-in they will additionally need to enter a code generated by the authenticator app to gain access to their account.

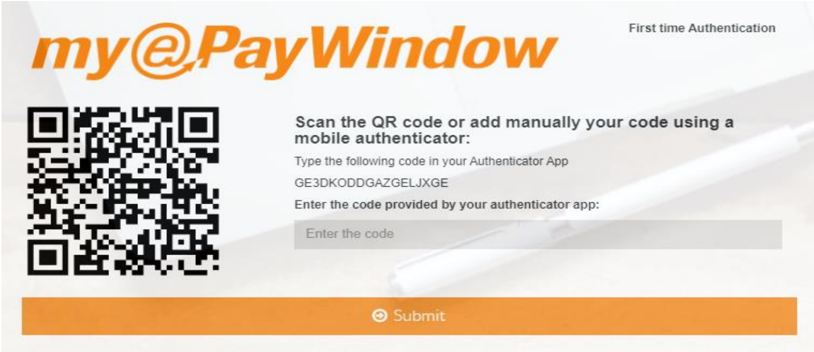


Users will be next asked to enter their username & password, after which they will be asked to scan the QR code or add manually using the authenticator app

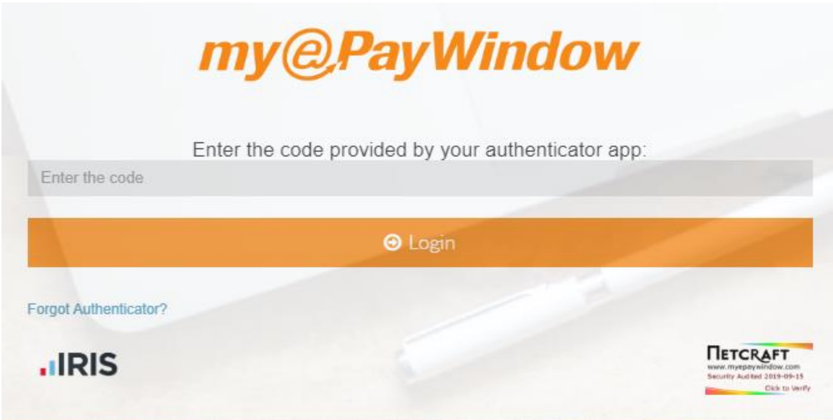
Ensure you have your "authenticator app" installed on your smartphone.

Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

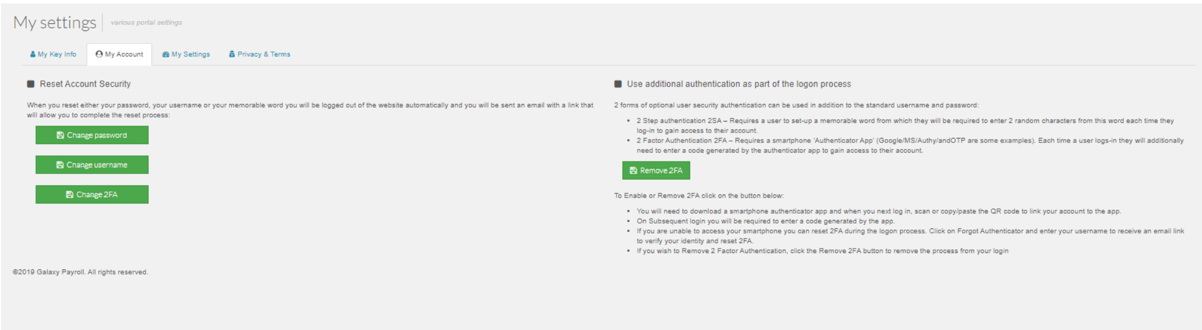
The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.



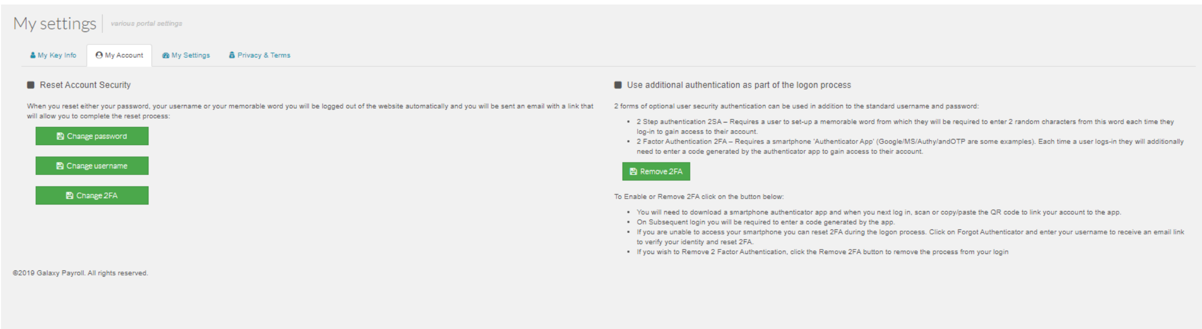
Enter the code from the authenticator app



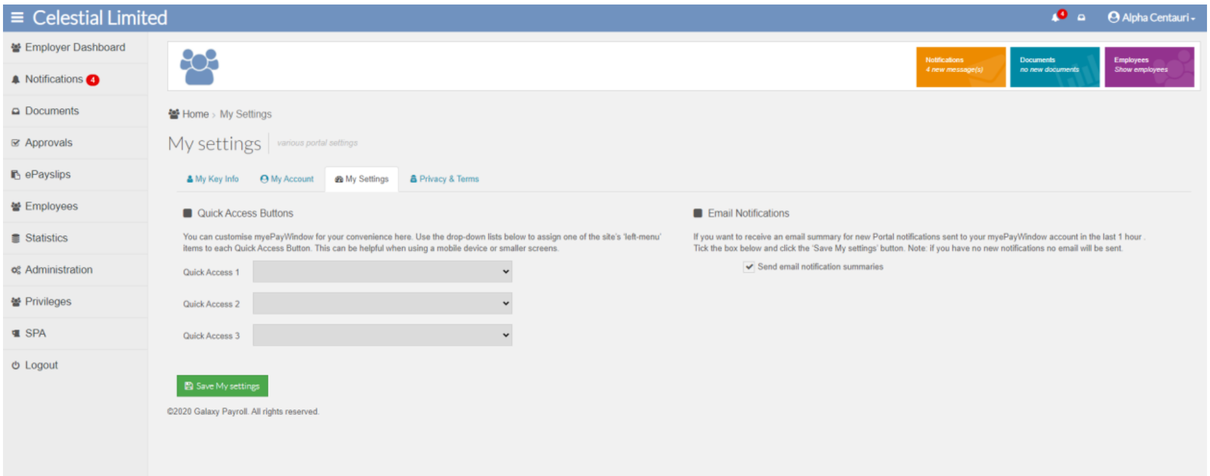
If you have 2FA Enabled, you will see a **Change 2FA** button, click on this to reset 2FA



Click on the **Remove 2FA** button to remove 2FA, you will no longer be prompted for a code from the authenticator app when you log in.



My Settings - My Settings

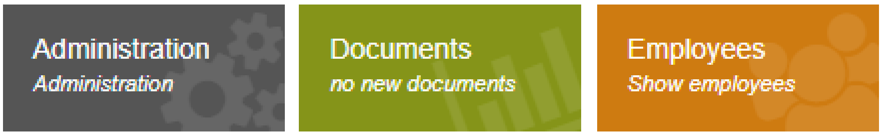


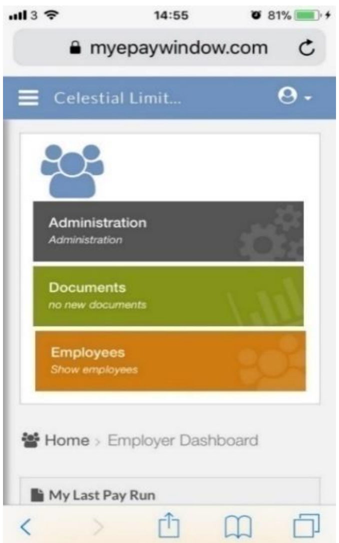
The My Settings tab allows you to personalise the Portal as follows:

- Quick Access Buttons – for easier user access via a smartphone or small tablet

Use the drop-down selectors to assign a left-menu item to **Quick access button 1, 2, 3** click **Save Dashboard** to save changes and apply.

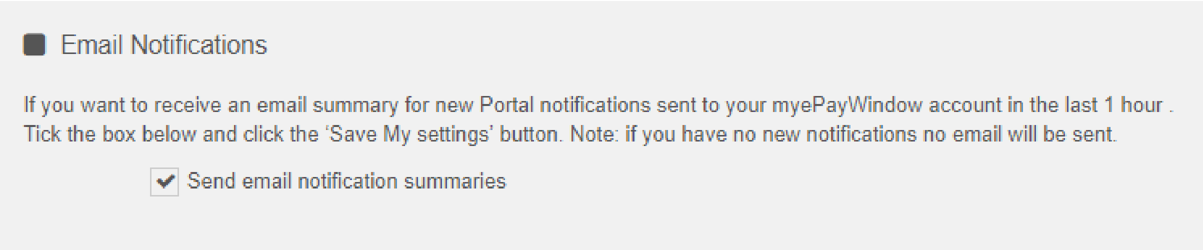
Note: The Quick access buttons are for convenience when accessing the Portal on a mobile device. (You can set your favourite menu item to the Quick access button (3) that will be closest to your thumb on a smartphone! – see screenshot over the page)



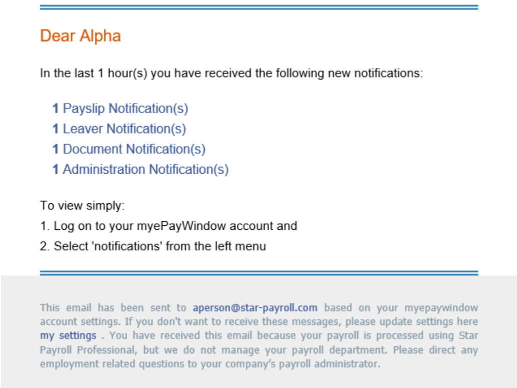


- Email Notifications – to opt to receive email notification summary to your registered Portal account email address. From update V10 (U3-2020) this box will be ticked by default for all new users.

Use this tick box to opt in/out of to receiving an an email summary for new Notifications. An email summary will be sent to your registered account email addrees (see My Key Info) <u>if you have new, unread notifications in the last 1 hour.</u>



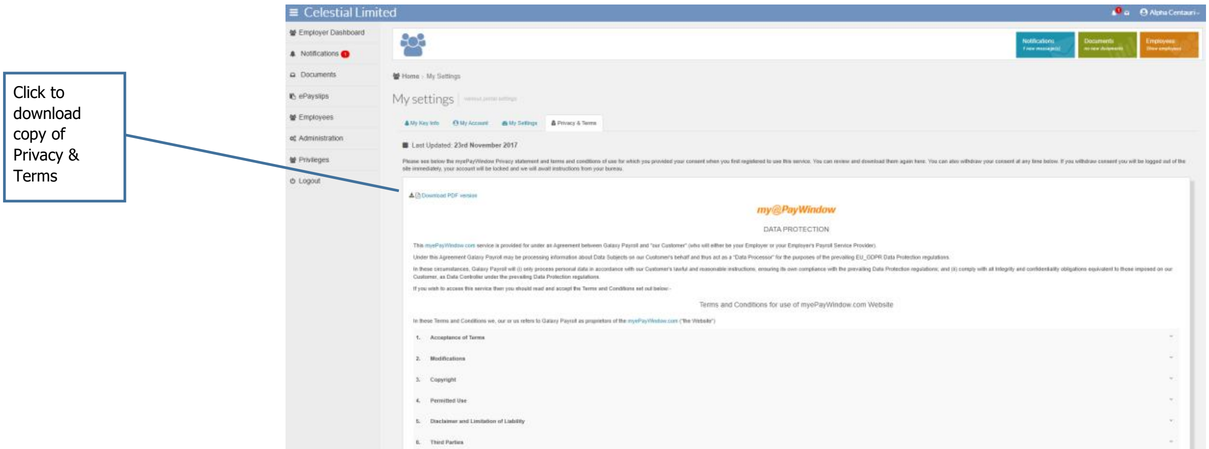
Example summary email Notification:



My Settings - Privacy & Terms

- Privacy and Terms – View/download myePayWindow terms and privacy and access Consent option

All Portal users must provide their consent to use the site upon registration. Once you have set up your account you can scroll this window to access a 'Consent' withdrawal button and click '**I do not agree**' button if you wish to discontinue using the site. This action will deactivate your account immediately and your Portal status will be set to Declined. A notification will be sent to other employer users and your Payroll department user to confirm this fact.



Any user that declines consent will need to be re-invited if they subsequently decide they want to use the Portal.

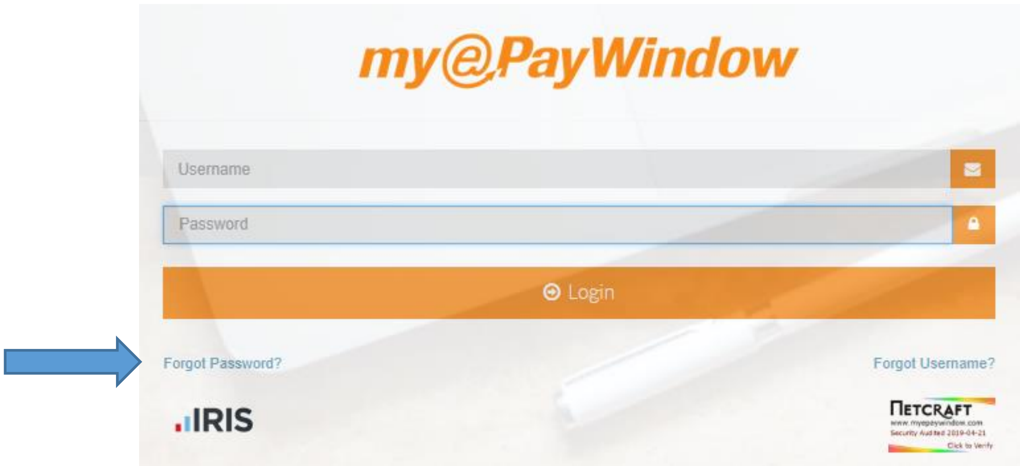
Re-setting Usernames and Passwords

Re-setting usernames and passwords is a fully automated process (i.e. they do not require Payroll department or Employer user intervention although such resets can be initiated by Payroll department or Employer users if required). The term 'user' applies to any Portal user i.e. Employee, Employer or Payroll department user. Any of these 'users' can initiate a reset directly from the Portal login page or once logged in to the portal via My Settings/ My Account options. Resetting Username and Passwords require the user to have access to their registered portal email account.

Automated password reset

Step 1 – From Portal login page

From the login page the user can click on **Forgot Password?** To start the reset process.



Step 2 – Request link

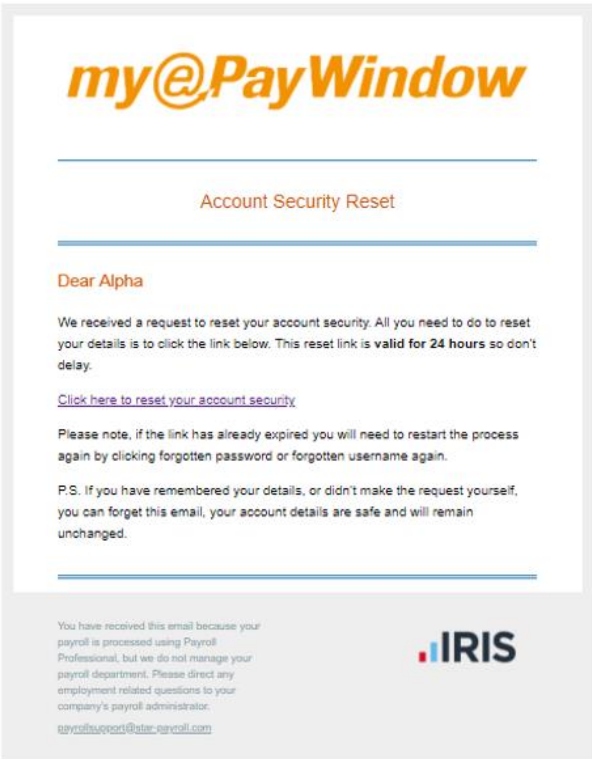
On clicking Forgot Password a new screen will appear requesting the user to enter the account Username. Enter the username and click **Submit**

Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

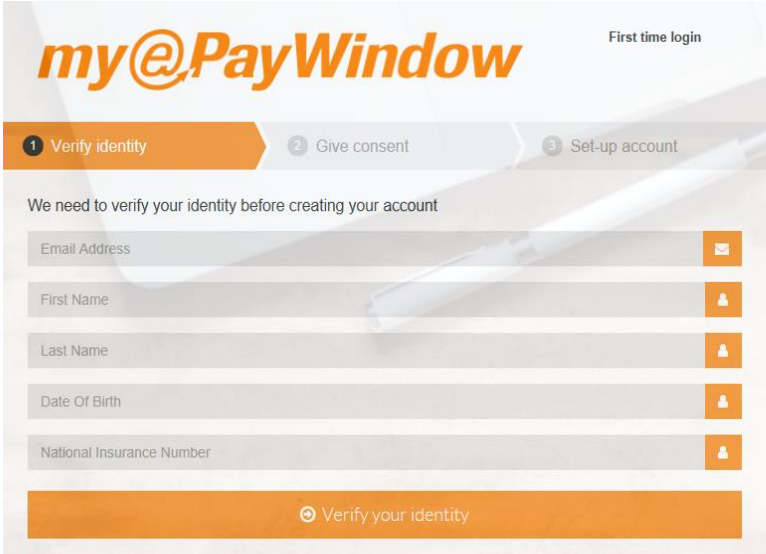
The user will receive an email (to their payroll registered email address) with a link to complete the password reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.



Step 5 – Verify identity

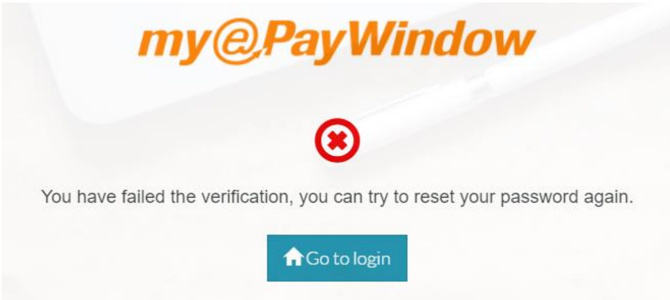
All fields must be completed correctly in order to complete the identity verification and to continue with the reset.

Note: The last field in verify identity screen for an Employer User will be the 'secret word' agreed with your Payroll department (Not the National Insurance Number, as this is required for Employee Users)



Step 5a – Verification failure

After 5 failed attempts at identity verification an error message is displayed, and the process will need to be restarted. This message will also be displayed if the reset link has expired.

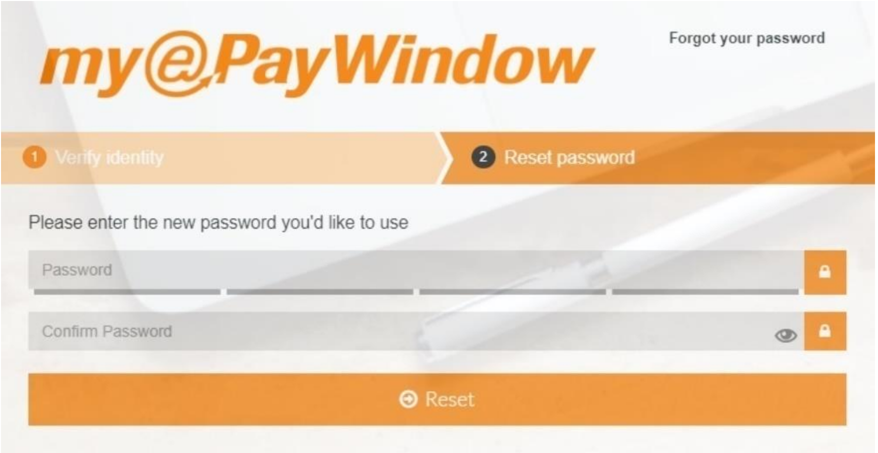


Step 6 – Enter new password

Once the user has verified identity correctly, they will be able to set a new password. The two password entry fields must match, there is no limit on the number of attempts.

Passwords will be validated and need to meet the following complexity rules.

- 1 upper case character
- 1 lower case character
- 1 special character
- 1 numeric character
- Contain between 8-40 characters



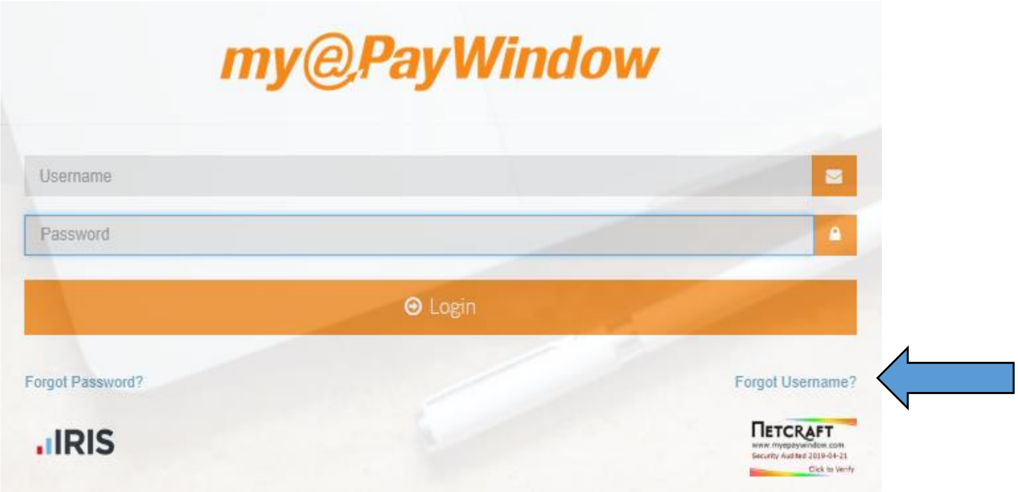
Step 7- Change Password confirmation

On clicking **Reset** the password change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login**

Automated username reset

Step 1 – From login

From the login page the user can click on **Forgot Username?** To start the reset process.

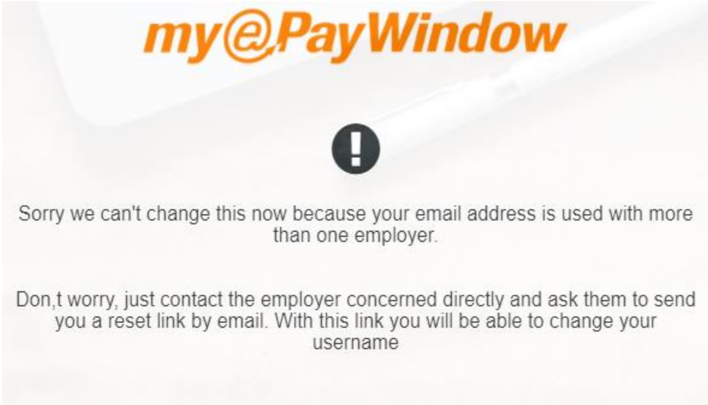


Step 2 – Request link

On clicking Forgot Username a new screen will appear requesting the user to enter the email address associated with account Username. Enter the email address and click **Submit.**

Step 2a – Email address used with multiple Employers

If an email address is used for more than one Employer, for example, when an employee works for two employers and uses the same email address for both, a warning message will be displayed. In such situations the Employee (or Employer or Payroll department user) will be asked to contact the Employer directly for the employment concerned so that an email link to reset can be sent to them (this can be done by the Employer or Payroll department from the Portal).

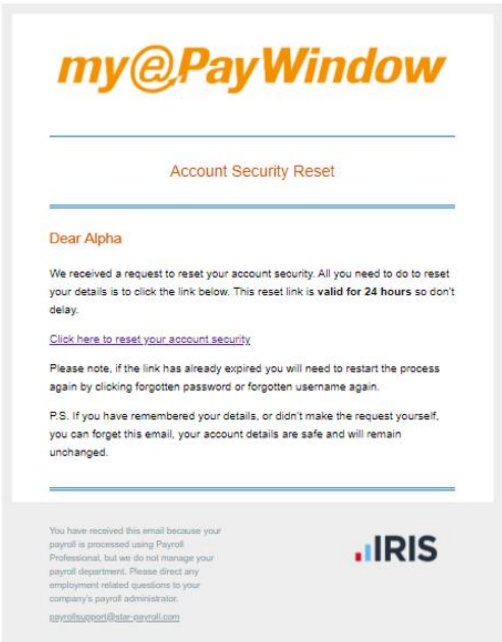


Step 3 – Confirmation of reset

Once the email has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the username reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.



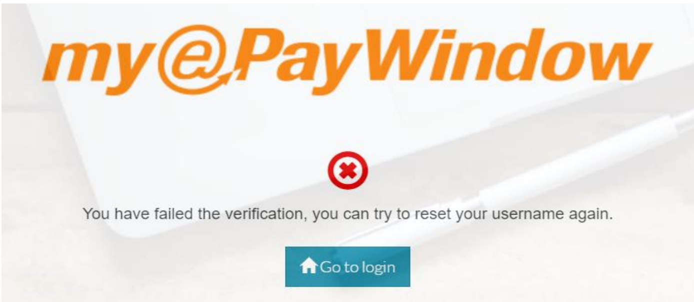
Step 5 – Verify identity

All fields must be completed correctly in order to verify identity and continue with the reset.

Note: The last field in verify identity screen for an Employer User will be the 'secret word' agreed with your Payroll department (Not the National Insurance Number, as this is required for Employee Users)

Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.



Step 6 – Enter new username

When the user has verified identity correctly, they will be presented with a screen to enter a new username. The Username must be at least six characters in length and Users are prompted that an email address can be used as this may be more memorable (note: when an email address is used as a username it may not necessarily be the same as the registered Payroll email address for the user).

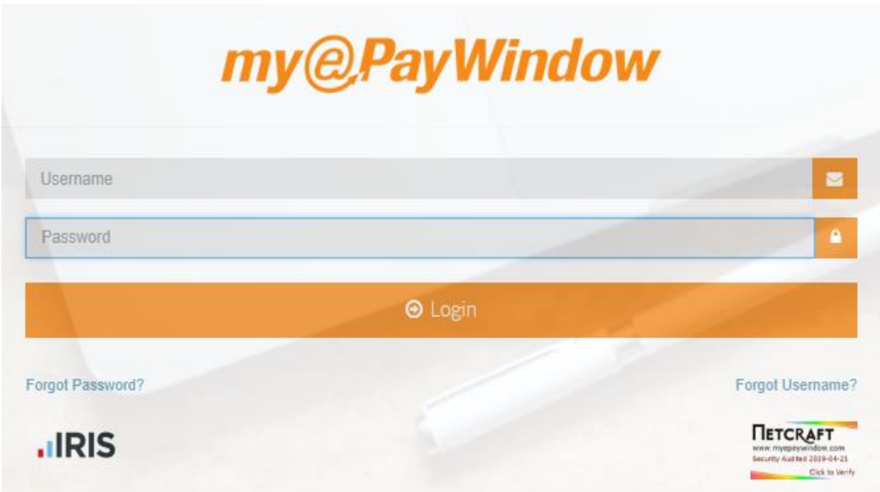
Step 7- Change Username confirmation

On clicking **Reset** the Username change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login.**

Automated Memorable Word reset

Step 1 – From login page

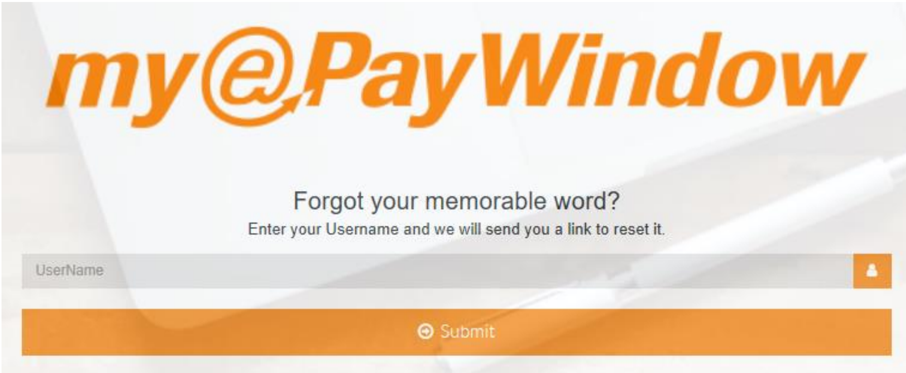
Complete the Username & Password as normal.



On the second page click on **Forgot Memorable Word?** To start the reset process.

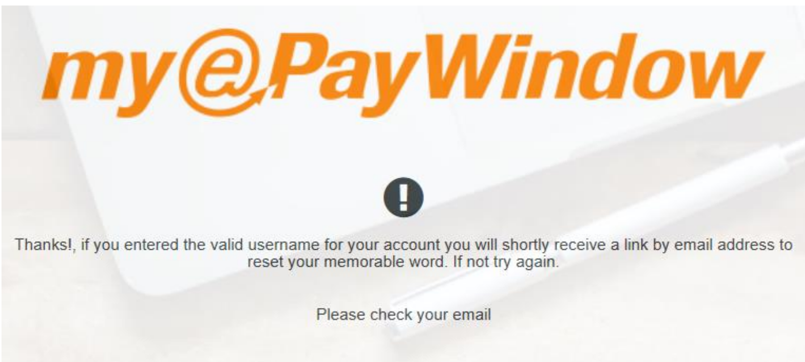
Step 2 – Request link

On clicking Forgot Memorable word? a new screen will appear requesting the user to enter the username associated with the account. Enter the username and click **Submit.**



Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

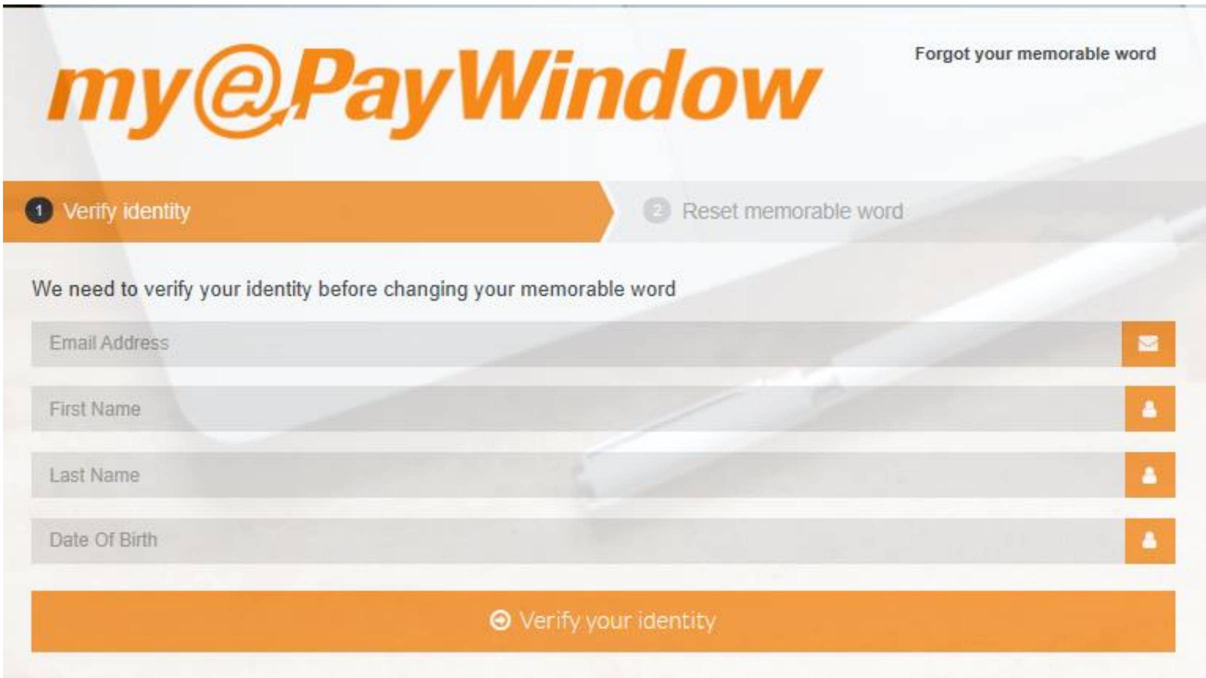


Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the memorable word reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.

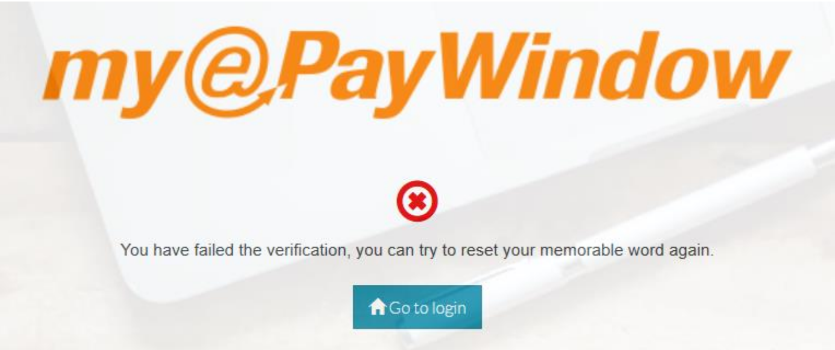
Step 5 – Verify identity

All fields must be completed correctly in order to verify identity and continue with the reset.



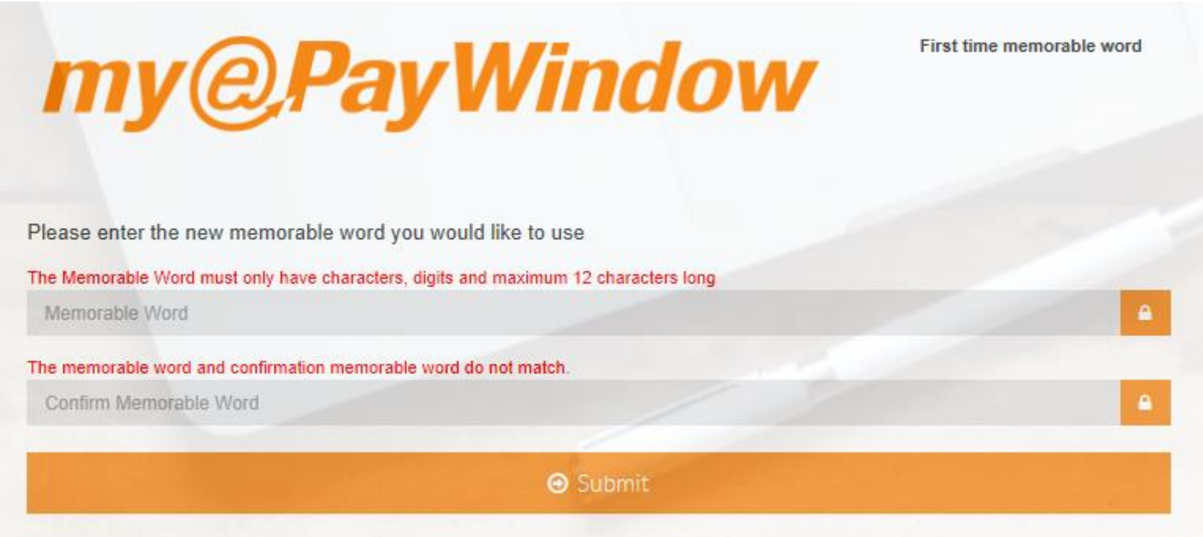
Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.



Step 6 – Enter new memorable word

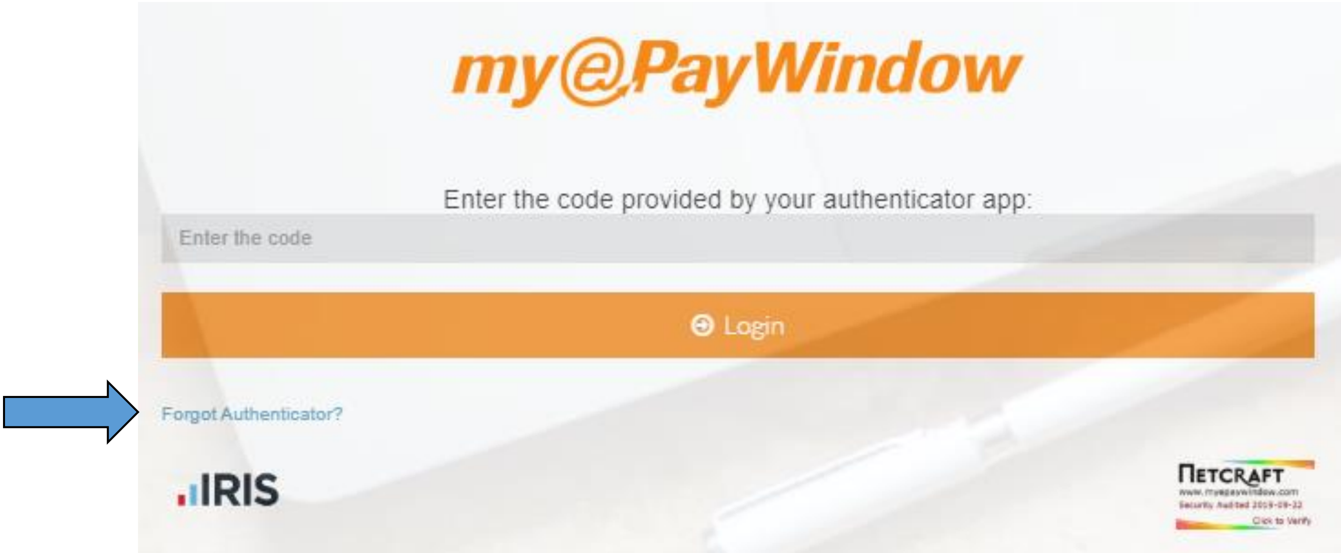
When the user has verified identity correctly, they will be presented with a screen to enter a new memorable word. The memorable word must be at least 6 – 12 characters in length.



Automated 2FA reset

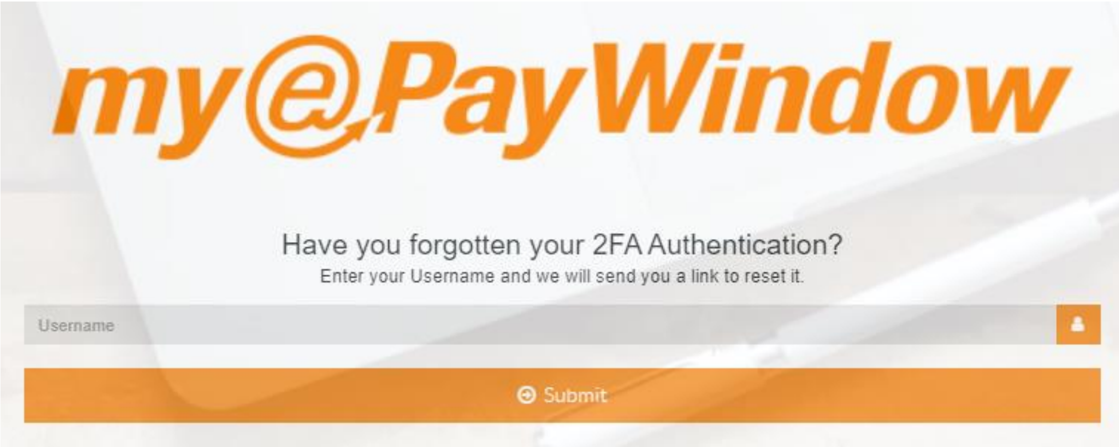
Step 1 – From login page

Enter username and password



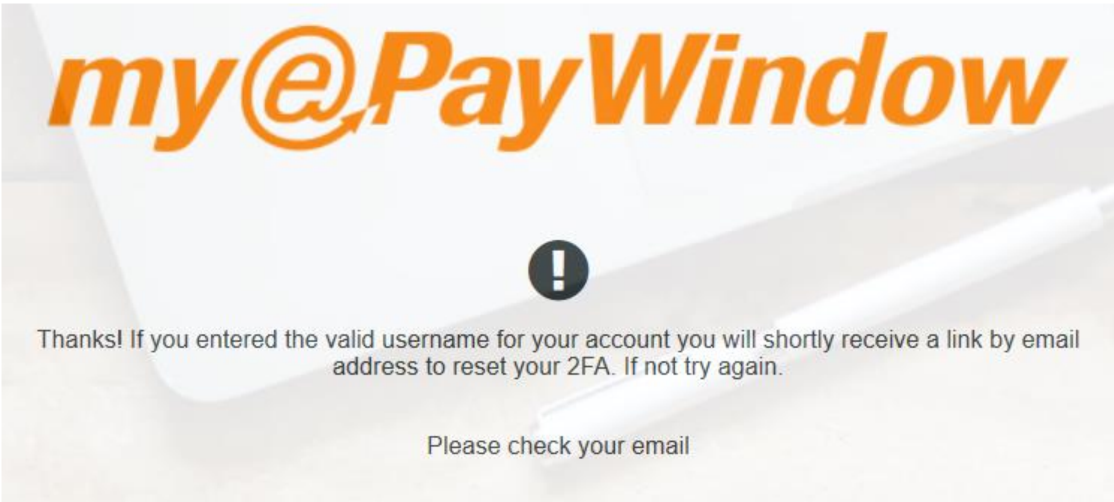
Step 2 – Request link

On clicking Forgot Authenticator? a new screen will appear requesting the user to enter the username associated with the account. Enter the username and click **Submit.**



Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

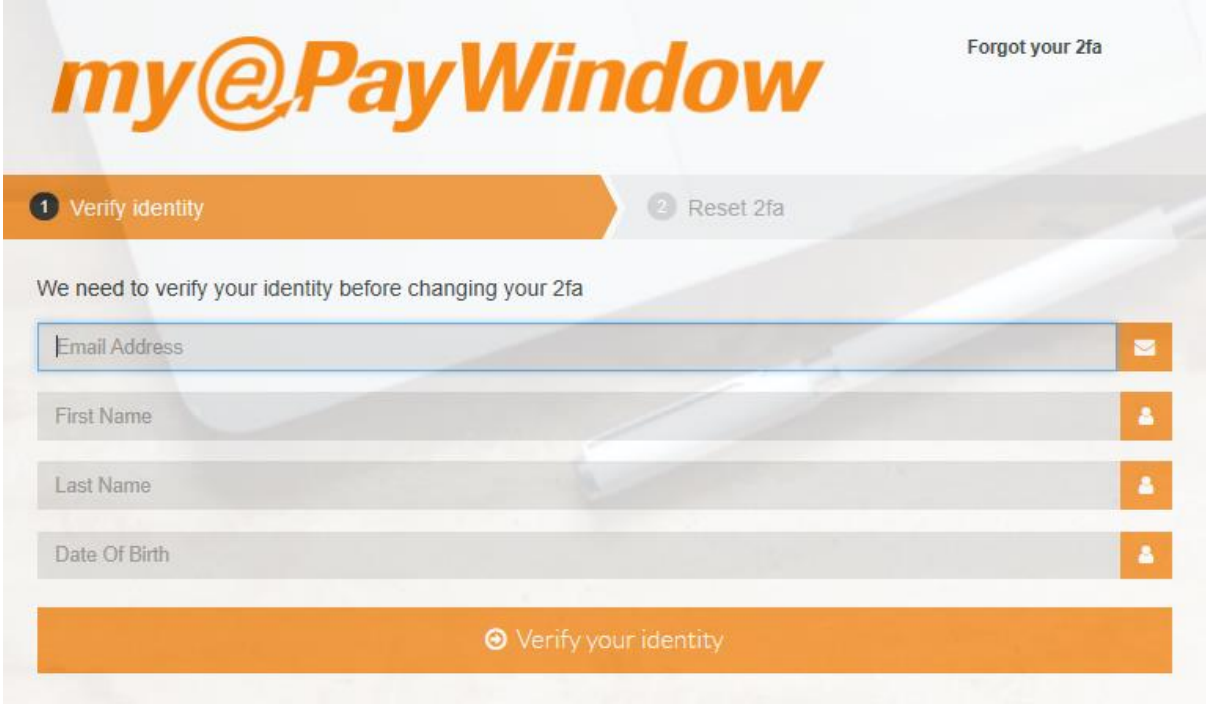


Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the 2FA reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.

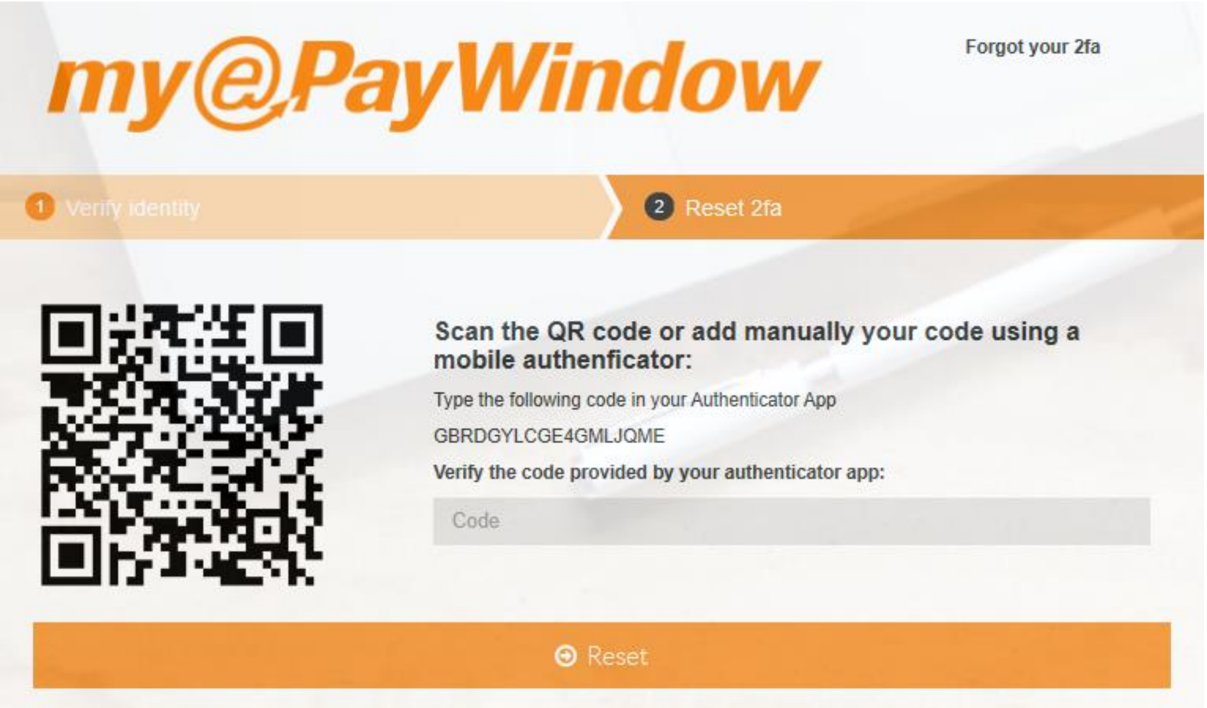
Step 5 – Verify identity

All fields must be completed correctly in order to verify identity and continue with the reset.



Step 6 – Reset 2FA

When the user has verified identity correctly, they will be presented with a screen to scan or enter a code.



myePayWindow maintenance

From time to time myePayWindow will require maintenance updates which are normally conducted outside normal business hours. During periods of maintenance the myePayWindow website will be taken out of service. If a user tries to access the website directly through a web browser the following message page will be displayed: