Bright Pay Connect User Guide for Employers

Contents

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

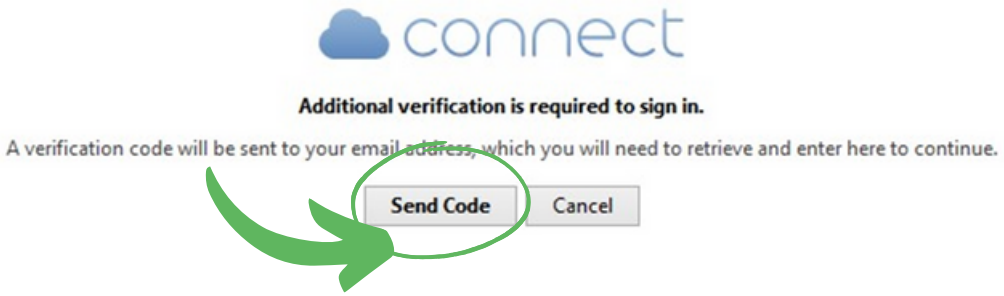
Employer Dashboard

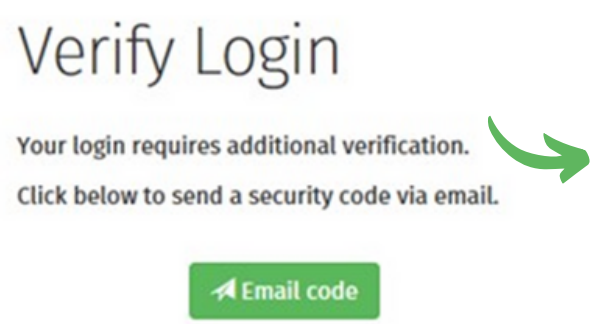
Signing-in

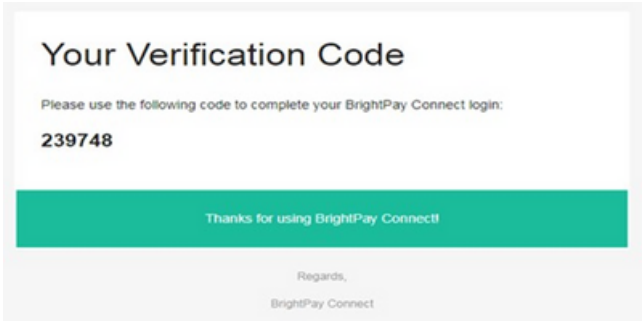
For security, Two Factor Authentication is enabled for employers.

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

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

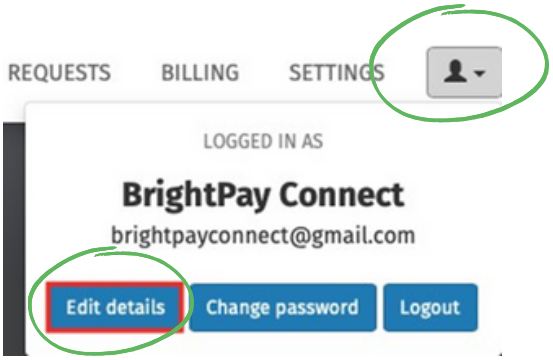




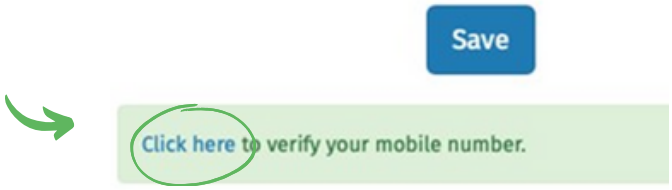


The user will have to enter the 6- digit numeric code in the **Enter Code field** and select **Verify**. Once the code is verified the user will be logged into their Connect.

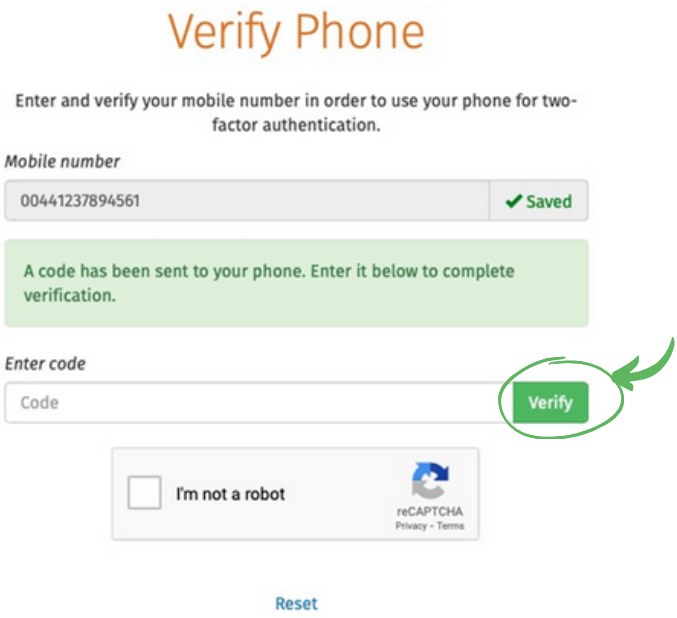
As an alternative method rather than email, there is an option to add a telephone number to a user's profile and have the code sent by text to the user as well as sent by email. When the user is logged into their Connect account, if they select the head icon in the top right hand side and select **Edit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



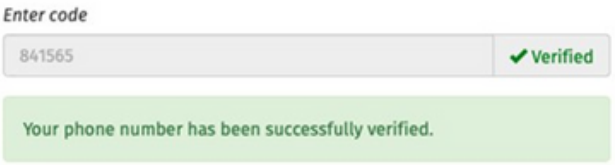
The user can enter in their mobile number by selecting the option to **Click here**, to verify your mobile number.



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



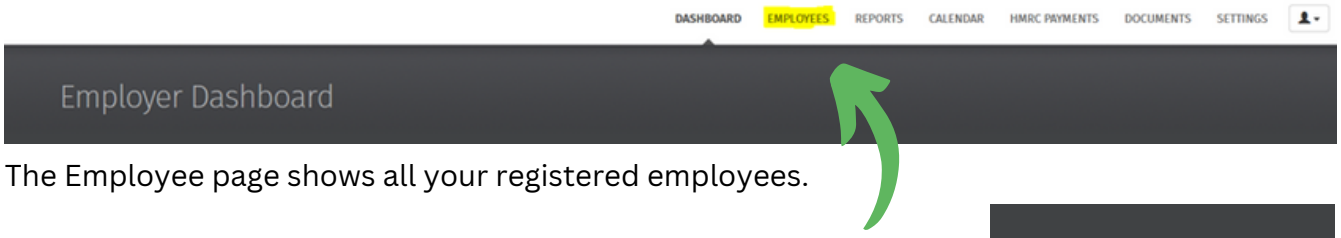
The phone number is successfully verified.



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

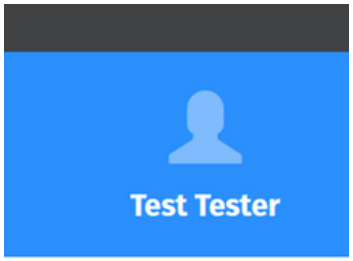
If the user is logging into Connect through an internet browser on the login screen, when enter in the code there is a box for '**Trust this browser**'. The user can select this if they do not want to do the two-factor authentication each time they log into Connect via this internet browser. The browser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

Employer Dashboard - Employees Section



The Employee page shows all your registered employees.

Click on an employee to navigate to their employee dashboard.

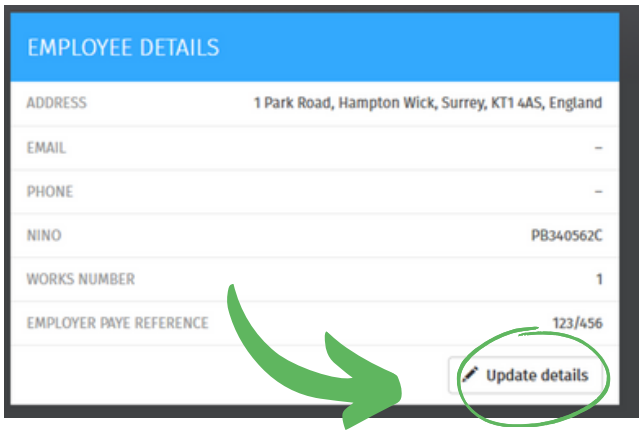


Your view of an employee's dashboard largely mimics what that employee will see when they use the employee portal: notifications, their details and calendar.

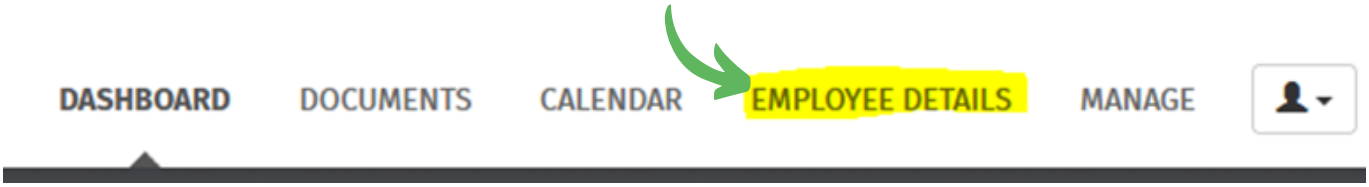
Please note: the '**Last Active**' date that is shown for each employee indicates the most recent time they logged in to **Self Service**, if applicable.

Making Changes to Employee Details

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



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

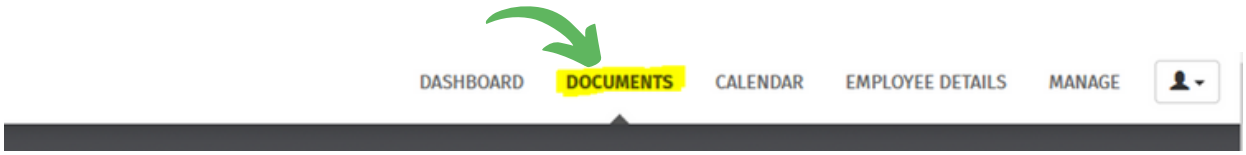


To add or change details, click the '**Change**' button next to each applicable field and enter or update the details as required. Click '**Save Changes**', when completed.

Any changes made here will automatically update the payroll information

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

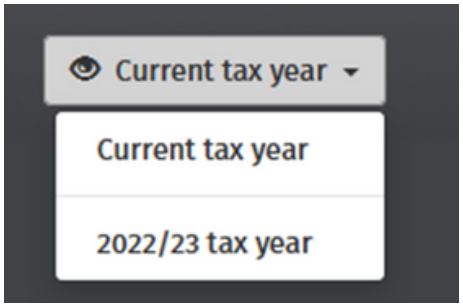
Viewing Employee Documents



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

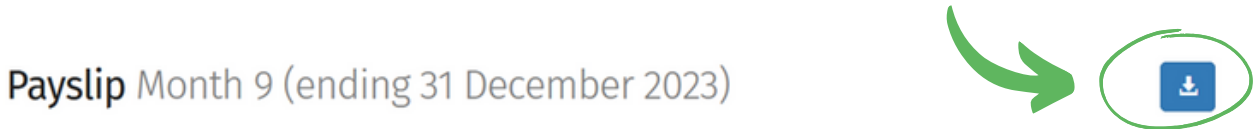
- the employee's payslips
- the employee's P60s (if applicable)
- P45 (if applicable)

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



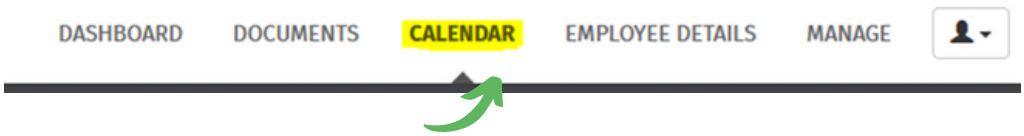
Select the document you wish to view. This will now be previewed on screen.

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



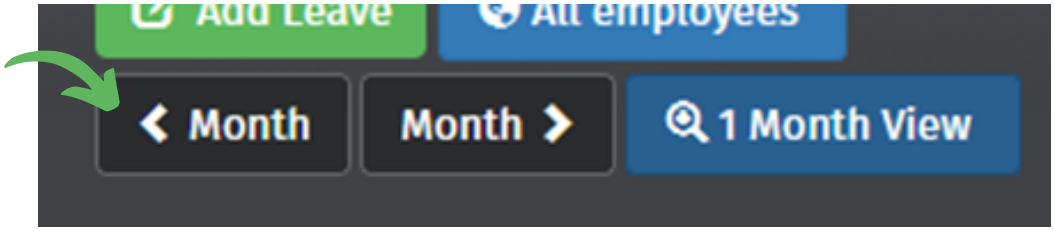
Employee Calendar

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

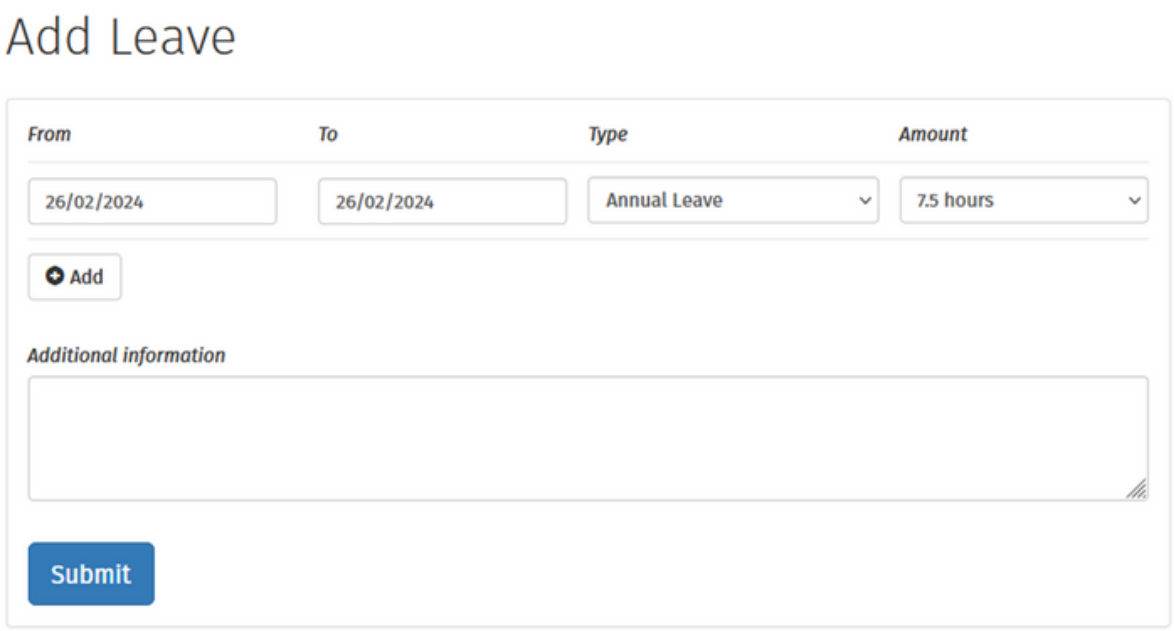


This will provide an overview of the employee's calendar events as follows:

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



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

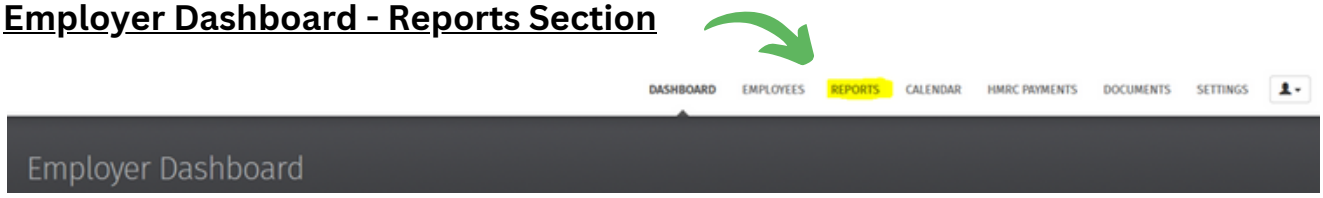


Select the Date, Type of Leave, and number of hours. Enter any additional information, if required.

Click '**Submit**' or click '**Add Day**' to add further leave days.
*If leave needs to be corrected, enter the dates and select type '**Cancel Leave Entry**' from the drop-down selection*

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

Employer Dashboard - Reports Section



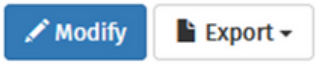
The Reports page will show all your payroll reports. The Payroll Summary report contains all the payroll information (like the current 'wages book').

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

The report selected will now be displayed on screen.

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

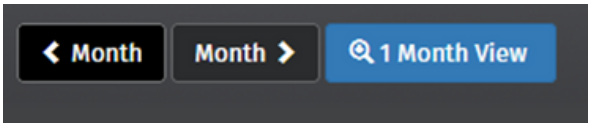
4) To export the report to PDF or CSV, click '**Export**' followed by '**Download as PDF**' or '**Download as CSV**'.



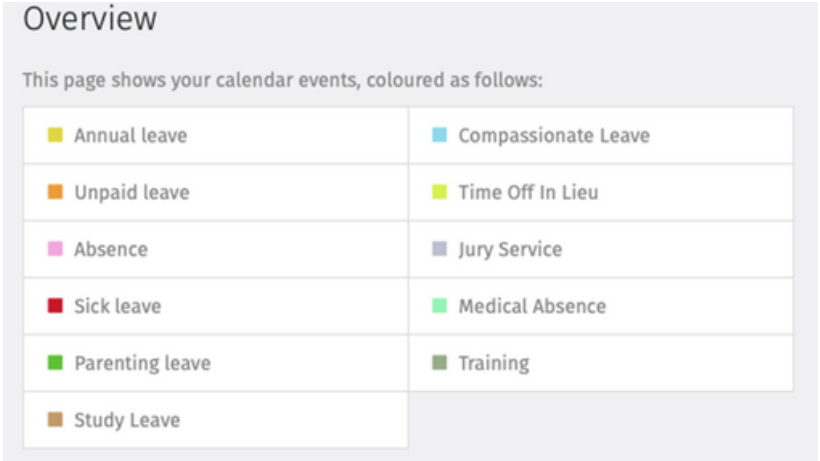
Employee Calendar - Calendar Section

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

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



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

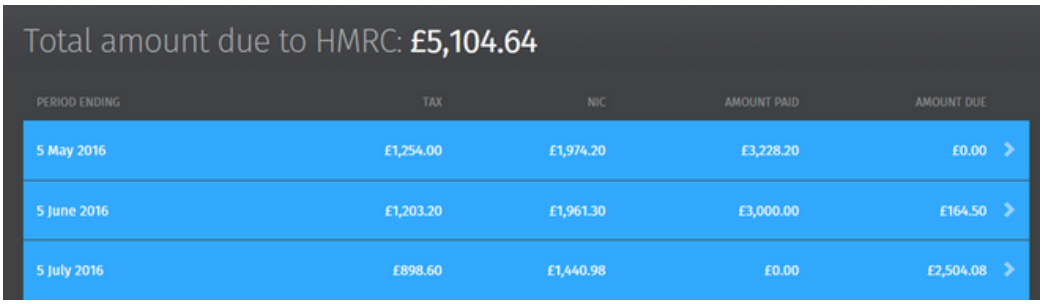


Dates with multiple types of events are dotted with the relevant colours. To see the breakdown, simply move your mouse over the date.

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

Employer Dashboard - HMRC Section

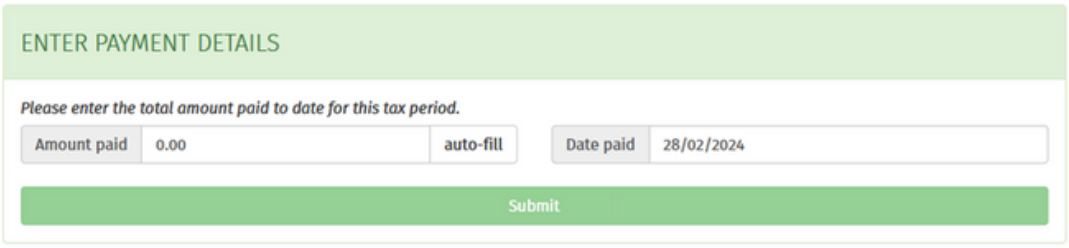
The HMRC Payments page displays the payments due to HMRC for the tax year.



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

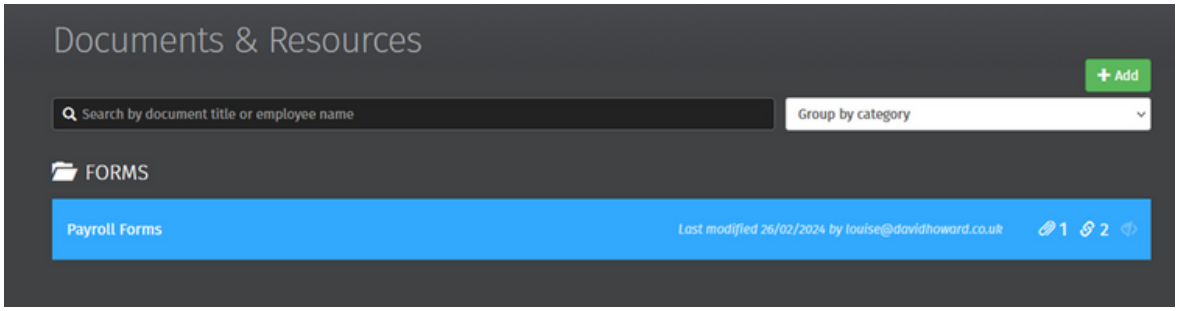
2) Click the '**download**' button at the top right to save the P30 to PDF.

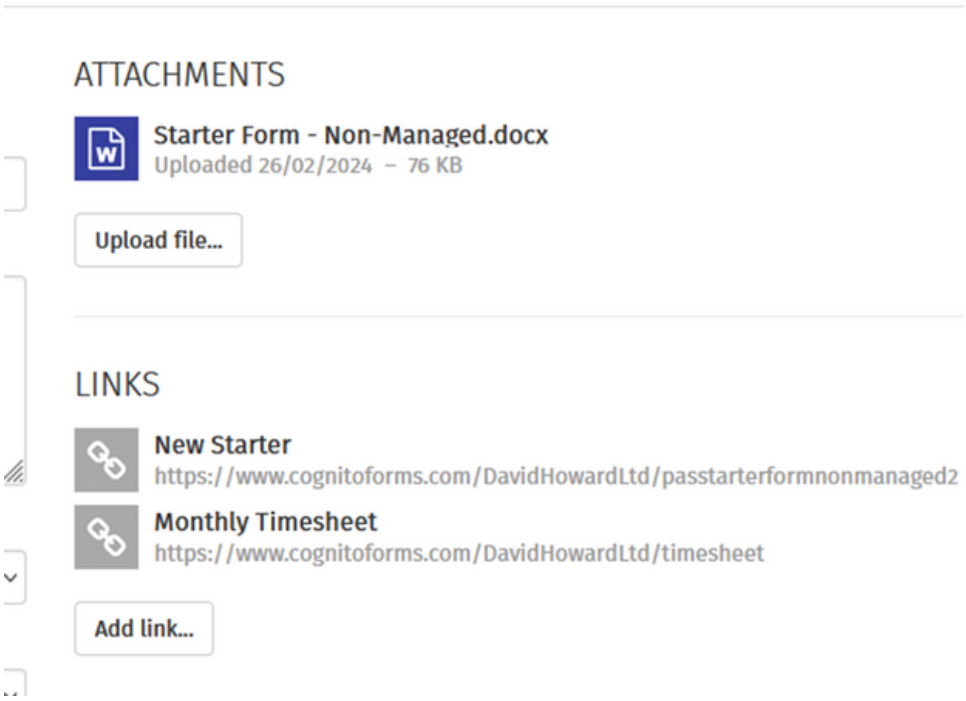
3) To help keep on top of your payments to HMRC, at the bottom of the page you can enter the amount and date paid for each tax period.



Employer Dashboard - Documents Section

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



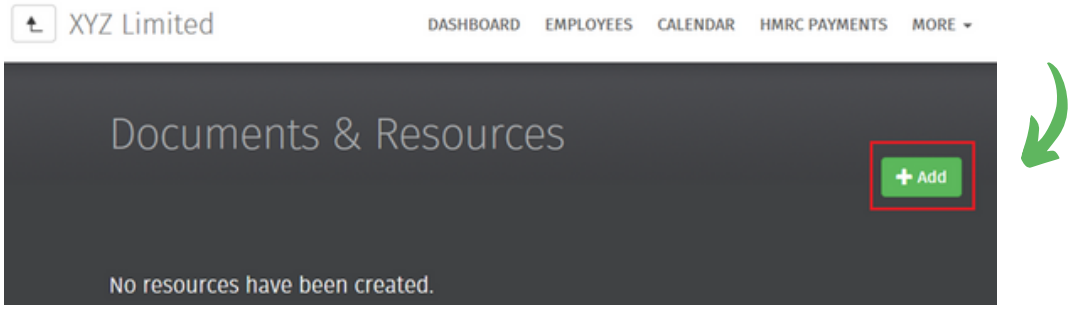


The **documents** section can also be used to store employee contracts of employment or other information such as training certificates.

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

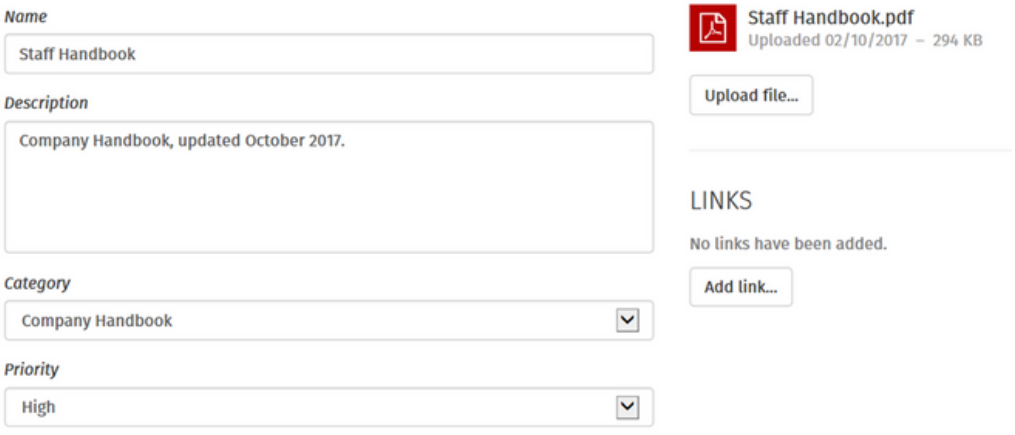
Adding a new resource

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



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

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



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

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

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

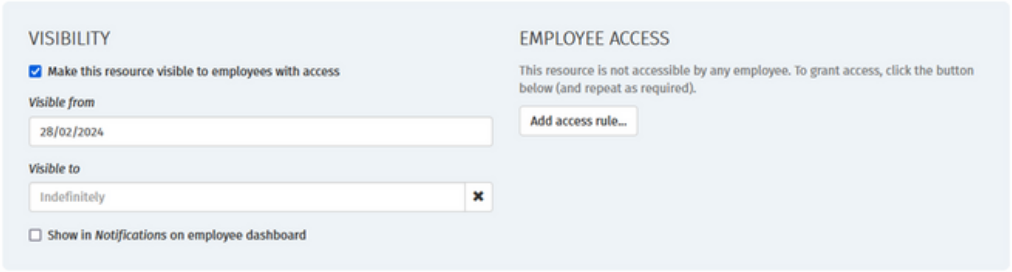
4b) Enter the Label you require and the associated URL. Click OK.

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

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

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

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

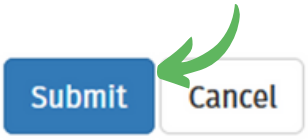


6a) Under Employee Access, click Add access rule... to grant access to one or more employees.

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

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

7) When ready, click Submit to save your settings



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