



# 12Pay

Payroll Made Easy

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# Guide to Open Payslips

April 2017



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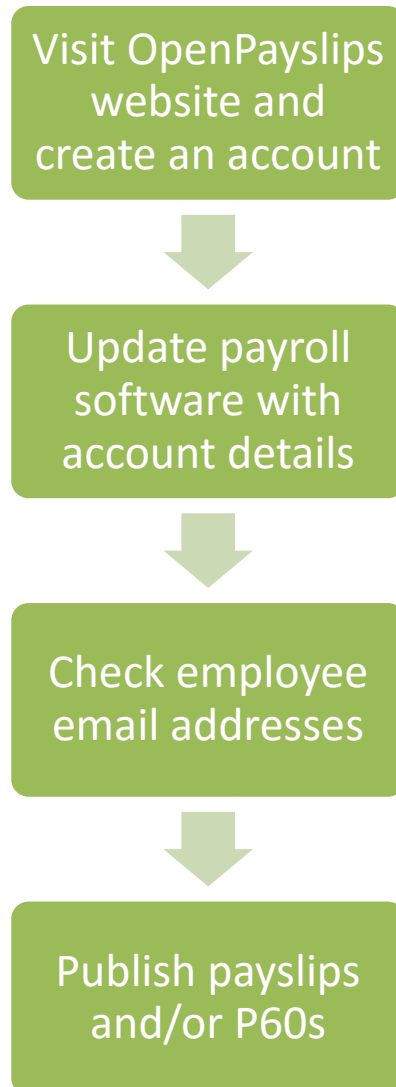
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## What is OpenPayslips?

OpenPayslips is a new way to distribute payslips and P60s to employees. Payslips and P60s are published from within the payroll software to a secure online payslip portal. Once employees have registered with the portal they are able to quickly view all of their current and historic payslips and/or P60s in an easy to access, secure area.

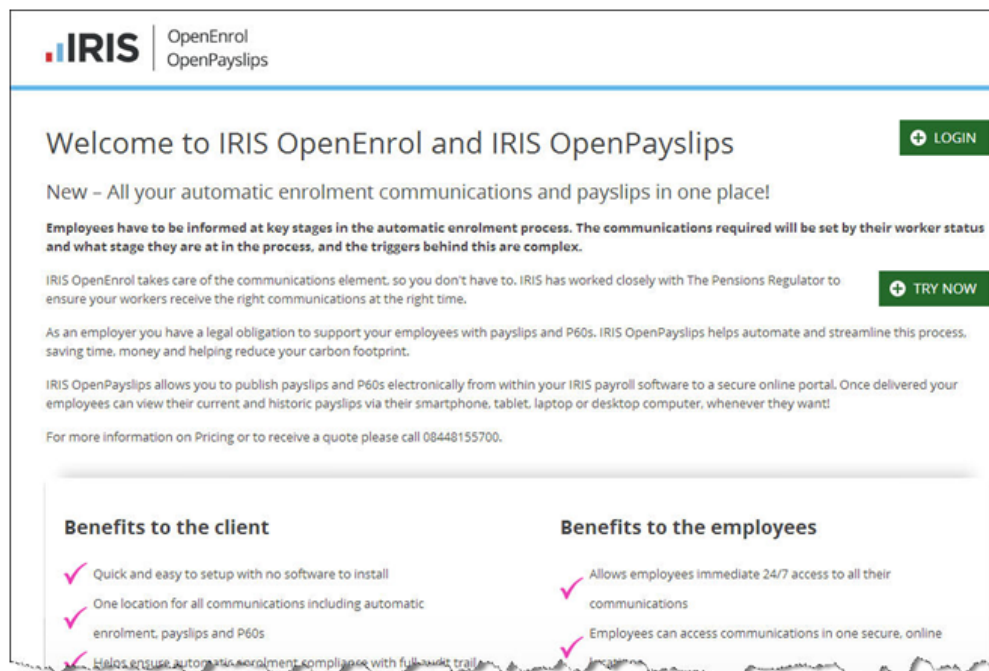
- All payslip/P60 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases payroll processing efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces payslip/P60 distribution costs including printing, postage and processing
- Fully secure
- Allows employees immediate 24/7 access to their own pay information
- Easy access to historical pay information for both employer and employee
- Free IOS, Windows phone and Android apps available for employees to securely view their own payslips/P60s on tablets or smartphones

## Steps to setting up and using OpenPayslips

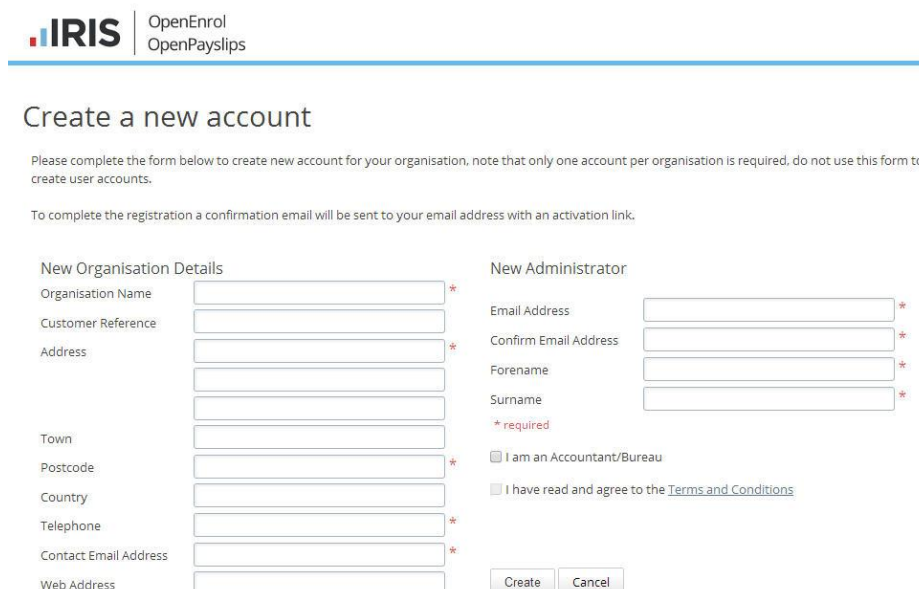


## How to create an OpenPayslips account

1. Visit the OpenPayslips website [here](#)



2. Click **Try Now** to open the following screen:



3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator – Email Address**
4. Click the link in the email to be taken back to the OpenPayslips website
5. Enter a **Password** and click **Set Password**

## Setting up and using OpenPayslips in the payroll software

The new **Administrator – Email Address** needs to be added into the software and all employees must have valid email addresses.

1. Enter your **OpenPayslips** log in details:

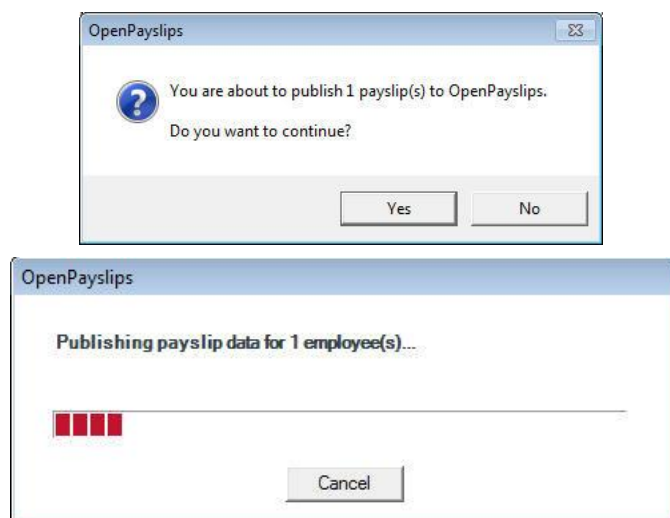
In the **Employer** folder, click on the **Publish** tab. Enter the **Username/Email** and **Password** that you used to register on the OpenPayslips website

2. Check that you have entered email addresses for employees in **Employee details | HR** tab

## How to publish payslips/P60s to the OpenPayslips portal

### Payslips

1. Once you have calculated the payroll from the **Payroll** screen for the pay frequency, select **Payslips | Publish Payslips**
2. A message will be displayed advising you are about to publish payslips to OpenPayslips, click **Yes** to continue

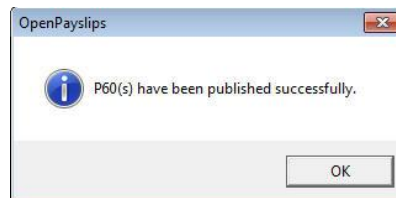
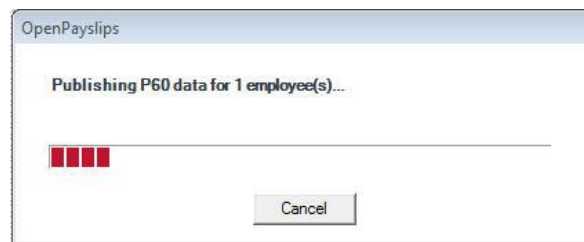


All employees being paid for the period with an email address will then be sent an email asking them to register with the OpenPayslips website to view or print their payslip

3. Once publishing is complete, another message will be displayed which will allow you to print payslips for those employees that do not have an email address entered

## P60s

1. From the Employer screen, select **Reports | P60 Year End Report | Publish P60s**
2. A message will be displayed advising you are about to publish payslips to OpenP60s, click **Yes** to continue



3. All current employees paid in the tax year with an email address will then be sent an email asking them to register with the OpenPayslips website to view/print their P60

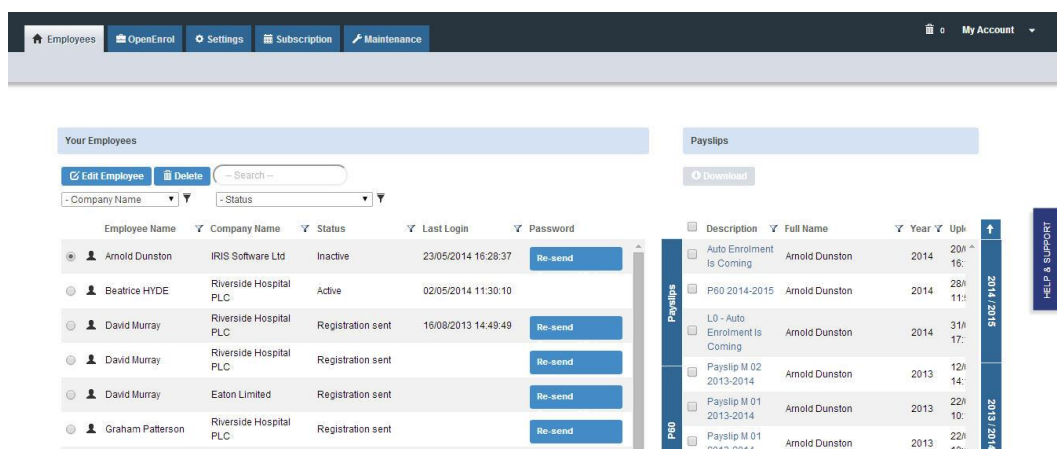
## How the employer views the published OpenPayslips/OpenP60s

To view the published payslips/P60s:-

1. Go to the OpenPayslips website [here](#) and log in with the registered email address and password
2. Click on an employee's name and the screen will change to show tax year folders
3. Select the tax year you wish to look at then click on either the **Payslips** tab or **P60** tab and the screen changes again to show the payslips/P60s uploaded for the employee in that tax year
4. Click on the Payslip or P60 and a new browser tab will open containing a copy to be viewed or printed as needed
5. Click back to the first browser tab to return to OpenPayslips

## Managing the OpenPayslips Account

The main page has five tabs on the top left, **Employees**, **OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (**OpenEnrol** is a separate module, detailed earlier in this guide)



The screenshot shows the main dashboard with navigation tabs: Employees, OpenEnrol, Settings, Subscription, and Maintenance. The 'Your Employees' section contains a table with columns for Employee Name, Company Name, Status, Last Login, and Password. The 'Payslips' section contains a table with columns for Description, Full Name, Year, and Upk. A vertical sidebar on the right indicates the current tax year is 2014/2015.

Employee Name	Company Name	Status	Last Login	Password
Arnold Dunston	IRIS Software Ltd	Inactive	23/05/2014 16:28:37	Re-send
Beatrice HYDE	Riverside Hospital PLC	Active	02/05/2014 11:30:10	
David Murray	Riverside Hospital PLC	Registration sent	16/08/2013 14:49:49	Re-send
David Murray	Riverside Hospital PLC	Registration sent		Re-send
David Murray	Easton Limited	Registration sent		Re-send
Graham Patterson	Riverside Hospital PLC	Registration sent		Re-send

Description	Full Name	Year	Upk
Auto Enrolment Is Coming	Arnold Dunston	2014	20:16
P60 2014-2015	Arnold Dunston	2014	28:11
LO - Auto Enrolment Is Coming	Arnold Dunston	2014	31:17
Payslip M 02 2013-2014	Arnold Dunston	2013	12:14
Payslip M 01 2013-2014	Arnold Dunston	2013	22:10
Payslip M 01 2013-2014	Arnold Dunston	2013	22:10

## Employees

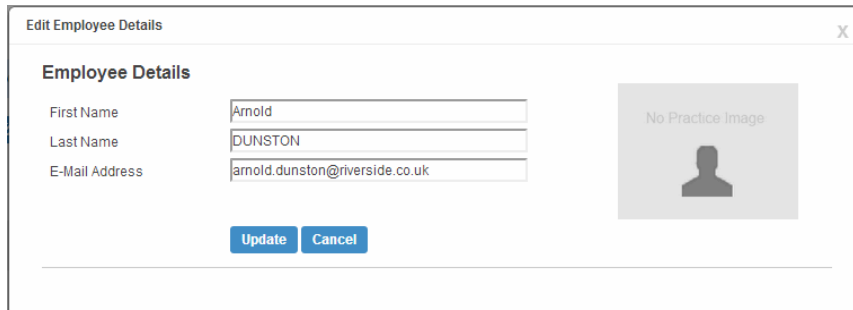
The **Employees** tab displays all employees from all companies in the payroll software that have had payslips published to OpenPayslips, along with their current **Status**.

The list of employees can be sorted using any of the columns; **Status** shows whether a registration email has been sent and whether the employee has registered with OpenPayslips yet.



## How to edit an employee's details

1. On the **Employees** tab select the individual using the buttons on the left, then click **Edit Employee**



2. Amend details, then click **Update**

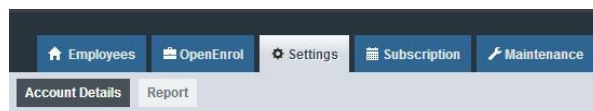
If an employee's email address changes, you must update it in employee details AND here, as it will not sync automatically when you publish payslips/P60s

## OpenEnrol

**OpenEnrol** is a separate module, detailed earlier in this guide.

## Settings

The **Settings** tab has two buttons on the top left, **Account Details** and **Report**



When the **Settings** tab is selected it opens by default on the **Account Details** view.

- **Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button
- From the **Report** button you can:
  - View **Published Payslips History** to create a report showing the number of files uploaded per Payroll Company. Enter the relevant dates and click either **Data Export (.CSV)** or **Print View**
  - Use the **Audit Log Report** to view a list of all actions taken within this account. Use the **Search** box to filter the results if required
  - View **Changed Employee Emails** showing previous email addresses and what they have changed to

## Subscription

The **Subscription** tab has two sections, **Contract Details** and **Invoice History**.

- **Contract Details** displays your **Contract ID**, **Contract Type**, **Start Date** and **End Date**
- Click on **Invoice History** to view, print or export invoices

## Maintenance

The **Maintenance** tab allows you to recall payslips that have been sent in error. You can recall **Payslips**, **P60s** and **Pensions** information by clicking on the relevant button at the top of the screen.

To recall a document:

1. Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
2. Click the **Recall** button

This will remove the published document from the website, it will not recall the actual sent email.

However if the employee tries to click on the link to the payslip/p60 in the email, it will not work.



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