SimplePay

EMPLOYEE SELF-SERVICE GUIDE

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Payslips Submitting Leave

Requests Updating Personal

Information

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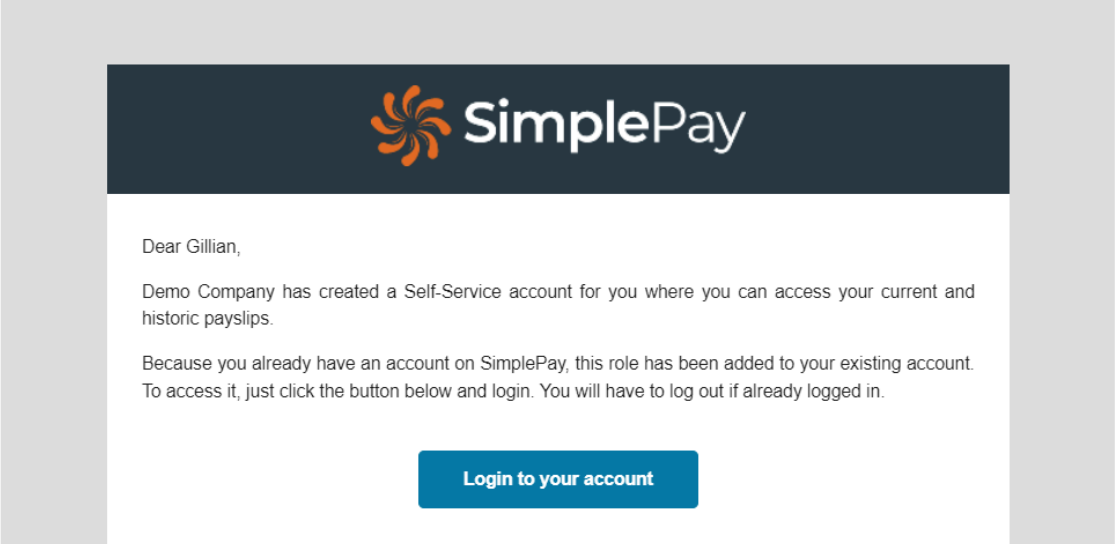
Getting your Self-Service Account Set Up

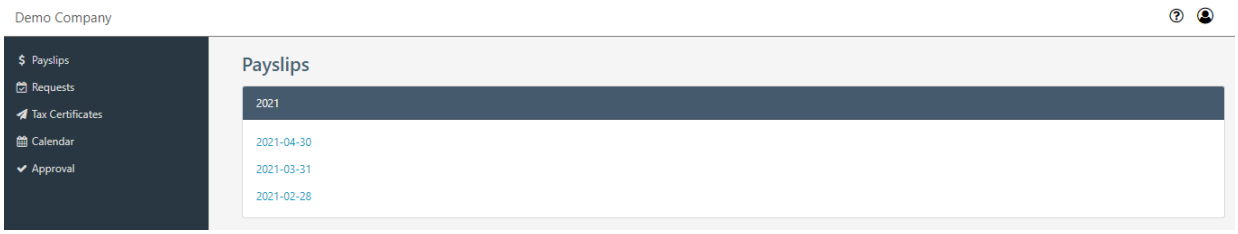
Employees that have had email addresses linked to their account and have had the Self-Service functionality enabled for their user will have access to the following self-service features:

- Download/view payslips, tax certificates and the leave overview calendar (if set up by your payroll administrator)
- Request/submit leave and other claim requests (if set up by your payroll administrator)
- Update/submit information pertaining to your personal info (update personal details, banking details, residential/postal address, income tax number, etc.)

New users will receive an email similar to the one below asking them to activate their account. Click on the link and set a password for your profile.



After having done this successfully, you will then be directed to the home screen of your profile where the **Payslips** screen automatically loads. From this page, you will notice you have headings: **Payslips**, **Requests**, **Tax Certificates**, **Leave Calendar** and **Approval** on the left



hand side of the screen.

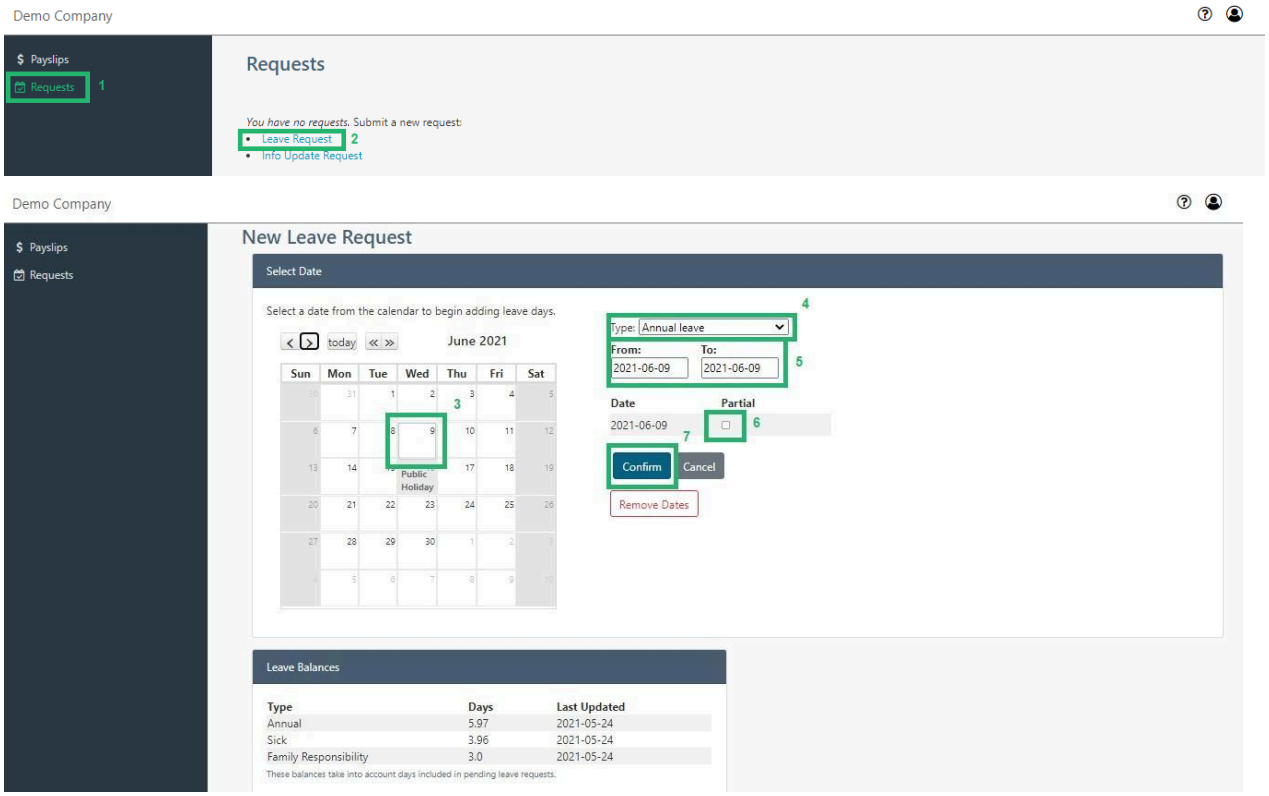
Please note:
*The visibility of each of these items will depend on the access your company's payroll administrator has provided you with. If you have **Approval** access, you are responsible for approving one or more employees' leave and/or basic info update requests.*

Viewing/Downloading Payslips

Your payslips are available to be viewed and downloaded from the Payslips screen. You are able to click on the relevant payslip (for the specific pay period) to view the payslip. Once you click on the blue hyperlinked writing, this will open the payslip in a new browser window.

Once the payslip has opened in a new window, you will then have the option to save, download and print it, depending on what internet browser you are using.

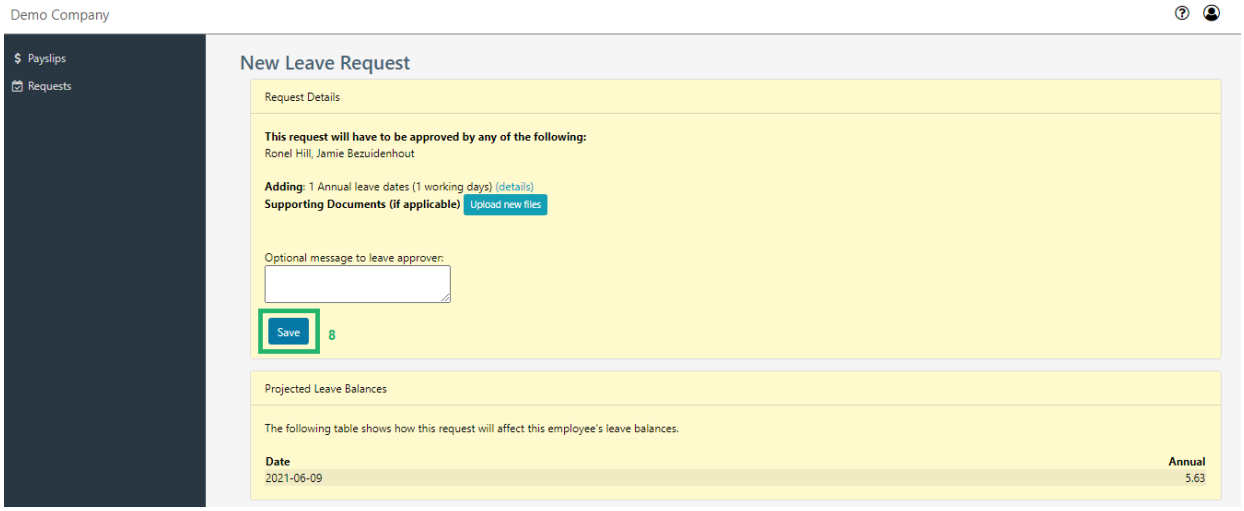
Requesting/Submitting Leave Requests



- From the left hand side task bar, click **Requests>Leave Requests**
- From the **New Leave Request** screen, select the date on the calendar you want
- Select the correct ***Type*** of leave and ensure the ***From:*** and ***To:*** dates are correct
- If the leave was for a ***Partial*** day(s) (e.g. half day(s)), select the checkbox for the relevant day(s)

- Click **Confirm** once you are satisfied the details are correct

Users will also be able to view their leave balances from the bottom of this screen if your payroll administrator has allowed you to view this information.



- After clicking on the **Confirm** button, the final screen will display who the leave request will need to be approved by.
- This screen also allows the employee to upload supporting documentation (e.g. a medical certificate in the case of sick leave, if applicable) and allows the employee to add an optional message to the person approving the leave request.
- Click **Save** and the leave request will be submitted to the leave approver(s)

This screen also displays the projected leave balances of the employee should the leave request be approved.

Once the designated leave approver for the company has either approved or denied the leave request, the employee will be notified via email. Leave approvers have the option of indicating why the leave was approved/rejected by means of a comment.

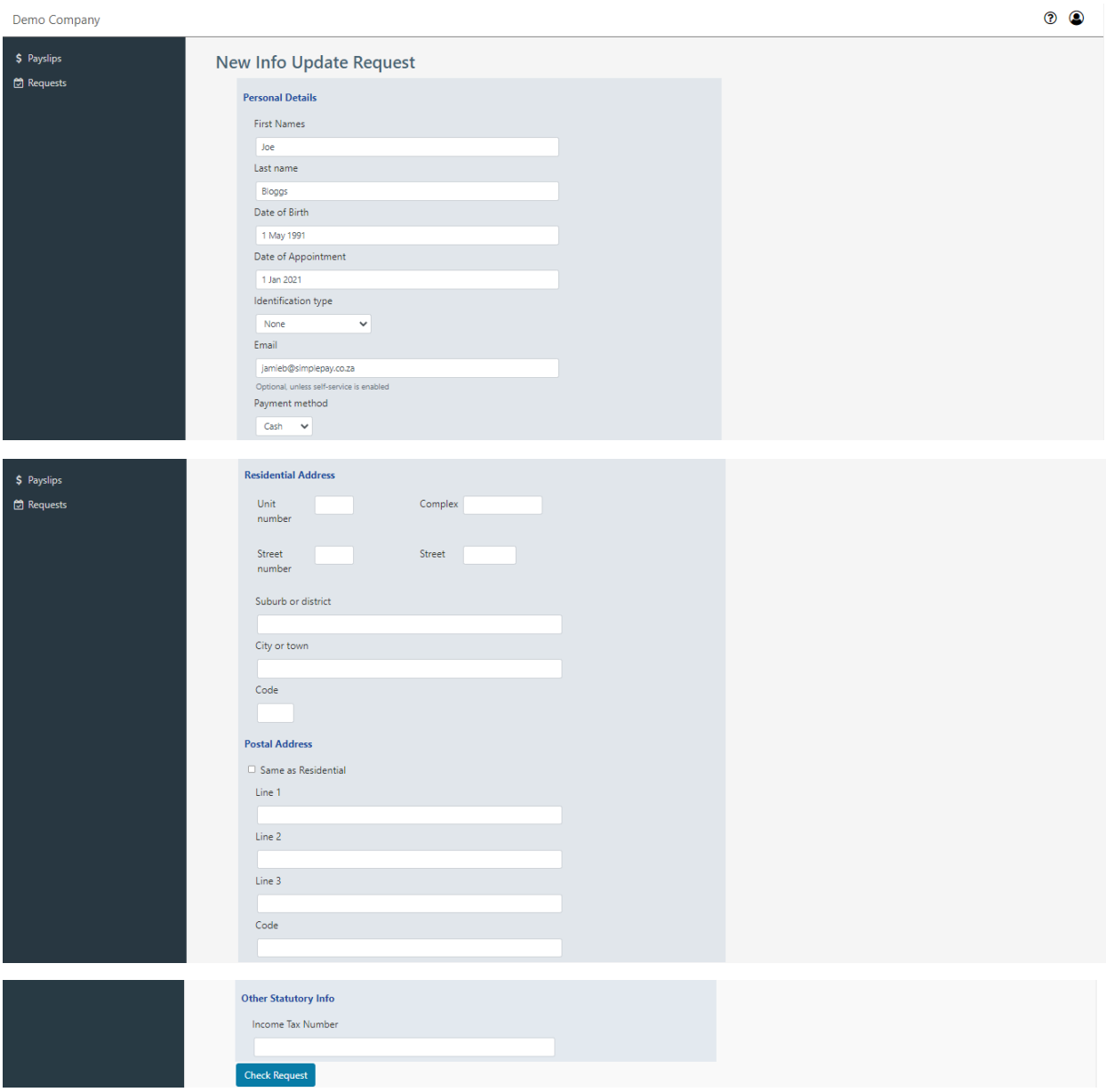
Employees also have the option of viewing the status of the leave request approval from the self-service portal. From this screen, employees are able to cancel (by clicking the **Cancel** button) or make changes/amendments to (by clicking on the ***Status*** field*)* the leave request. For additional/new requests, the process above can be followed by selecting the blue hyperlink writing **Leave Request**.

Updating Personal Information

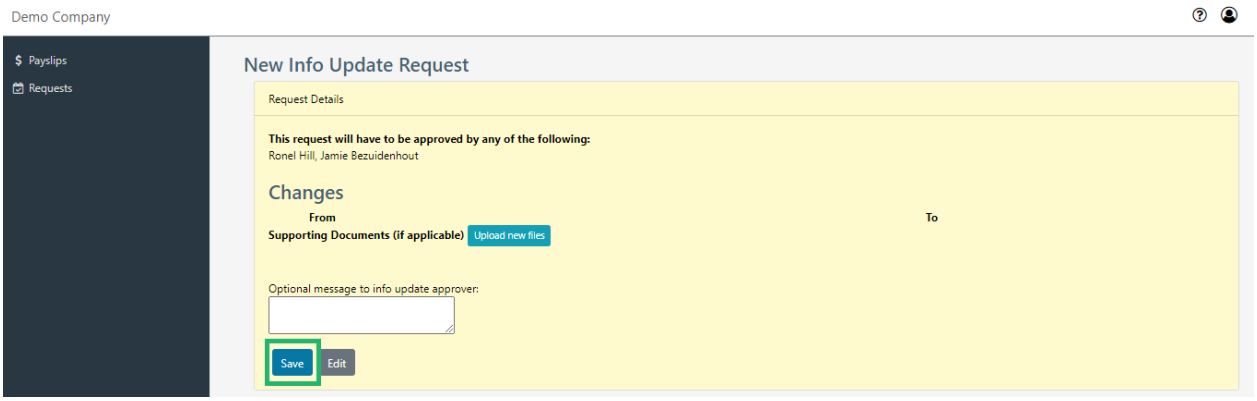
Employees using the self-service functionality have the option of changing their personal details. The following information are examples of the information that can be changed:

- Personal Details
- Bank Account Details
- Residential and Postal Addresses
- Income Tax Number

- From the left hand side task bar, click **Requests>Info Update Request**
  Note: this may appear towards the bottom of the screen when there have been historic requests on the profile
- From the **New Info Update Request** screen, the employee has the option of updating their personal information (including banking details), their residential and postal address and their tax number
- Once the changes have been made and the employee is satisfied, click **Check Request**

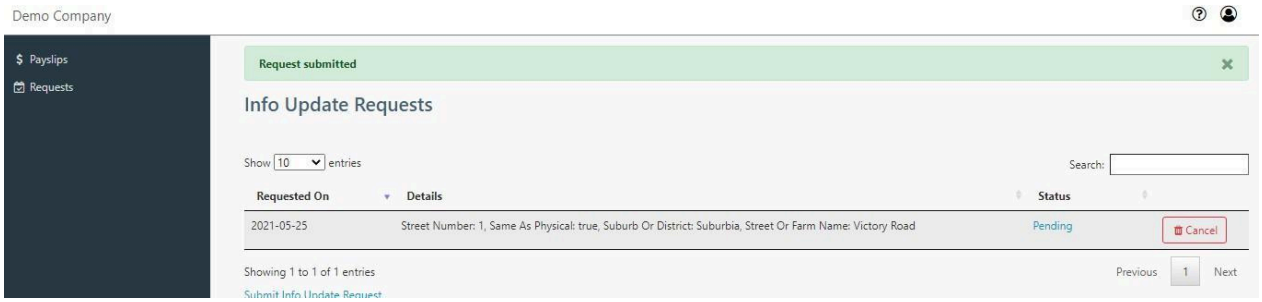


- After clicking on the **Check Request** button, the final screen will display who the info update request will need to be approved by
- This screen also allows the employee to upload supporting documentation (e.g. a bank statement or proof of banking details in the case of a change of banking details, if applicable) and allows the employee to add an optional message to the person approving the info update request
- Once satisfied, click **Save** and the info update request will be submitted to the info update approver(s)

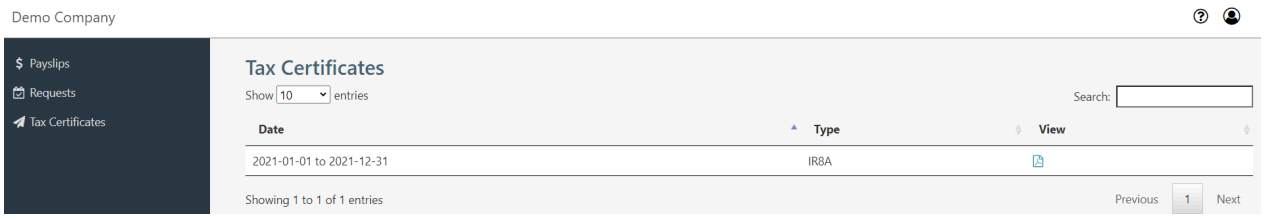


Once the designated info update approver for the company has either approved or denied the info update request, the employee will be notified via email. Info update approvers have the option of indicating why the info update was approved/rejected by means of a comment.

Employees also have the option of viewing the status of the info update request approval from the self-service portal. From this screen, employees are able to cancel (by clicking the **Cancel** button) or make amendments to (by clicking on the ***Status*** field*)* the info update request.



Viewing/Downloading Tax Certificates

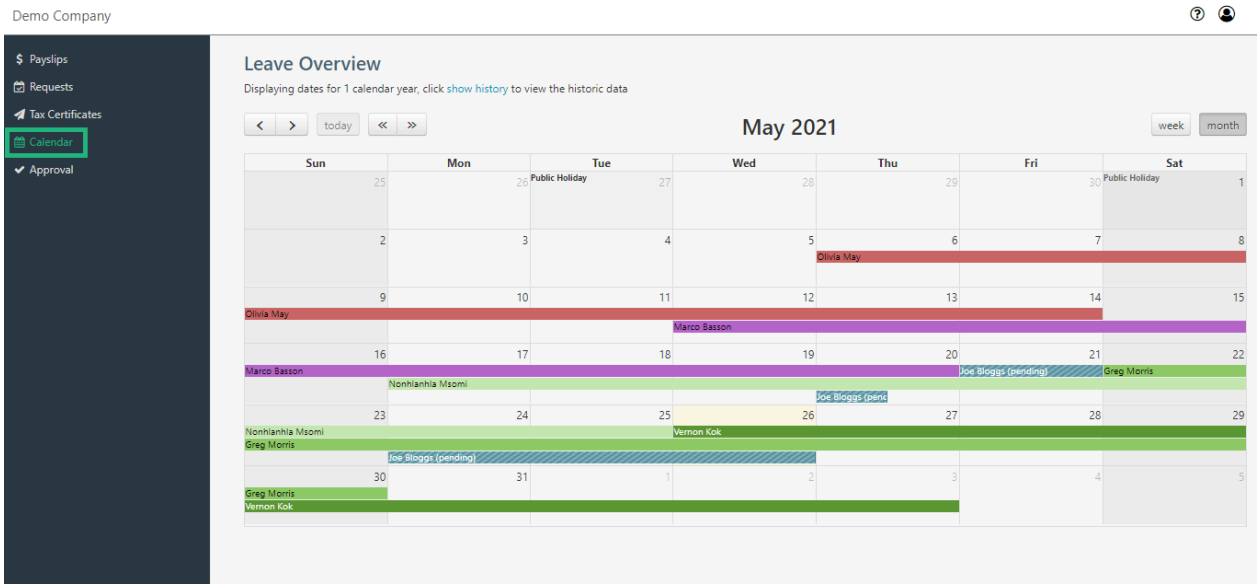


Tax certificates are issued annually by employers to employees and usually take the form of an IR8A.

Tax certificates can be viewed and downloaded by clicking on Tax Certificates from the left hand side task bar. This will then bring up the main Tax Certificates screen showing the past 10 records (as a default, this option can be changed with the dropdown at the top left hand corner

of the Tax Certificates screen). To view a payslip for a particular period, click on the PDF icon. Depending on your browser options, the tax certificate may open in a new window, tab or automatically be downloaded.

Viewing the Leave Calendar

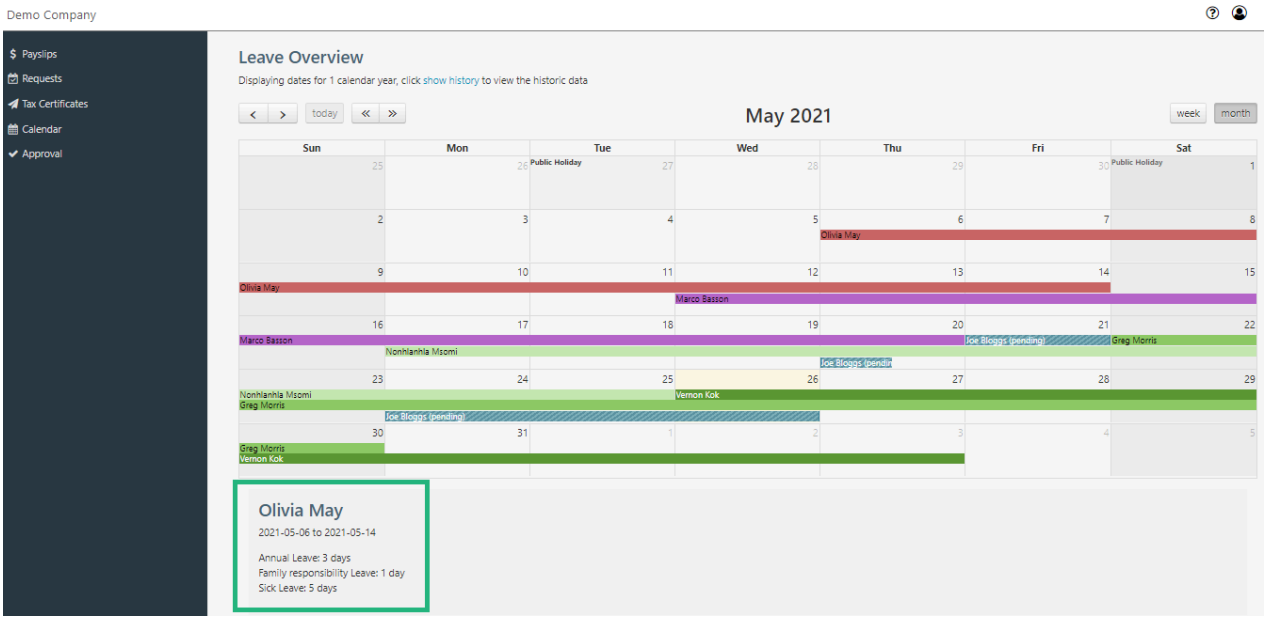


The Leave Calendar allows you to view leave requests (as well as their approval status) for each employee over a specific period of time (month or week).

The visibility of the leave calendar and whose leave you are able to view depends on the permissions the payroll administrator has set for you. As such, you may have complete access to view all leave requests for the entire company, just for specific employees or no access at all.

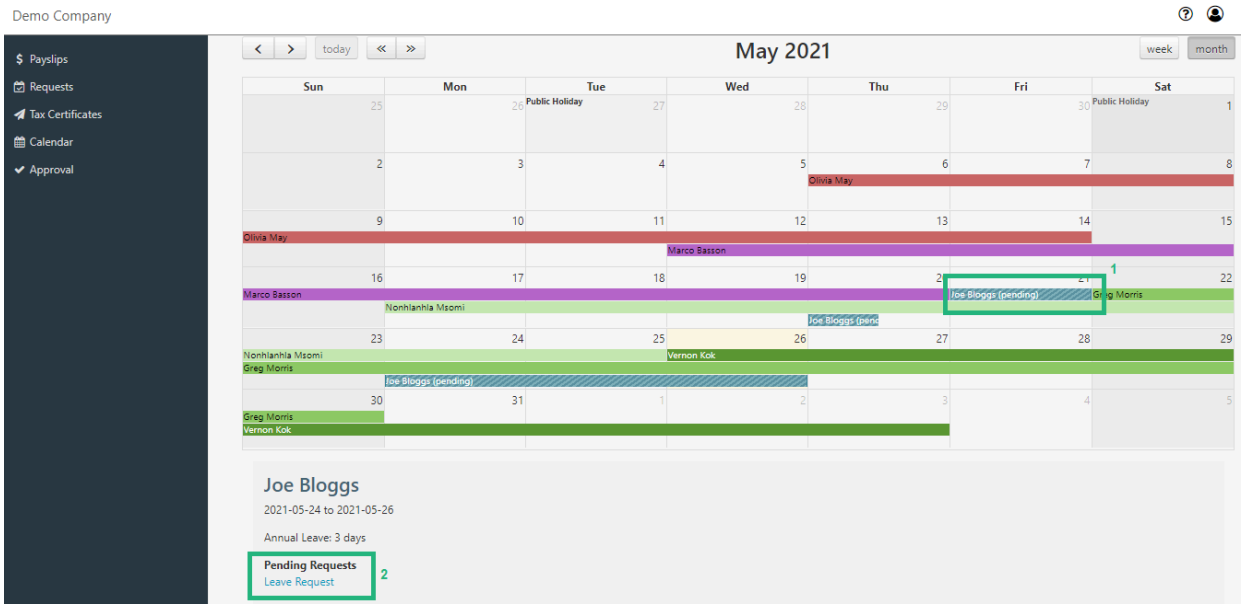
A single click on an entry will bring up a summary for the specific employee.
For example, for Olivia May (6 - 14 May), we're able to see that of the 9 days' leave, 5 days were for annual leave, 1 day was for family responsibility leave and 3 days were for sick leave.

Note: The system calculates how many days to deduct for each type of leave depending on Olivia's regular working days/hours; if her regular work days do not fall on a Saturday and Sunday, the system will not deduct these days from her annual leave balance.

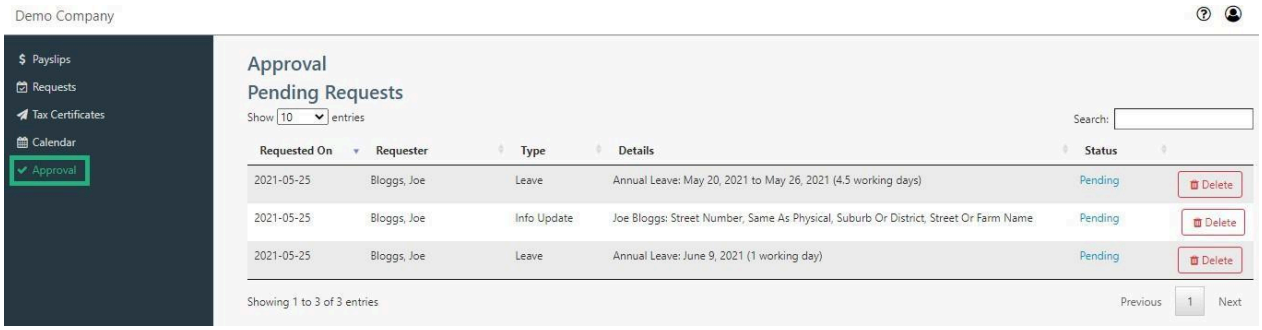


The system also displays pending leave submissions that require approval from this screen (if the leave request is for the displayed period). Once again, depending on the permissions you have, you will be able to view the pending request and either approve or deny the request from this screen.

More information pertaining to leave and basic info update requests will be covered in the next section.

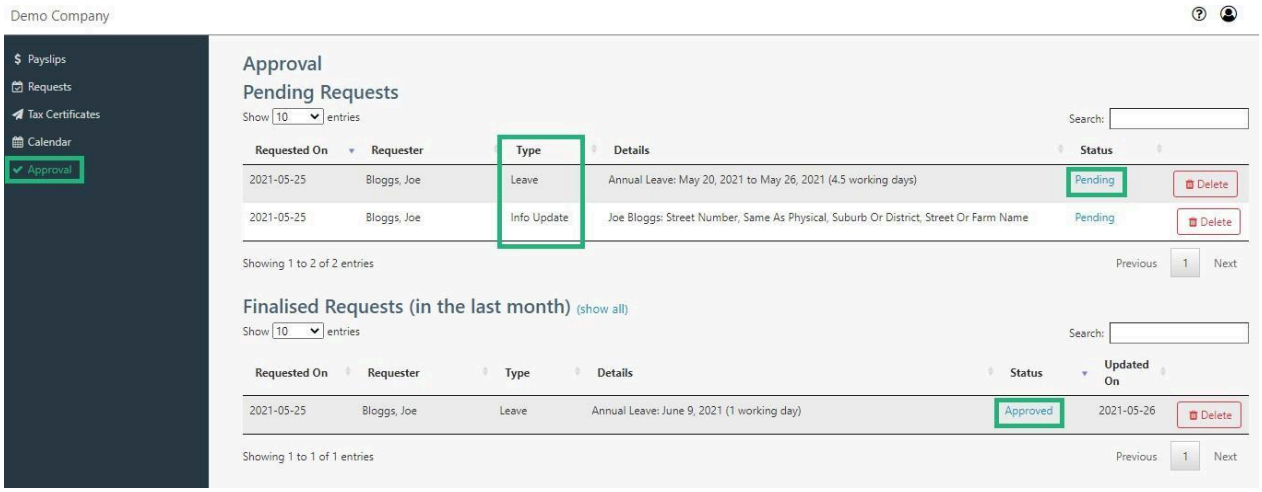


Leave and Basic Info Update Request Approval



Depending on your permissions, you may be able to approve/deny leave and info update requests for one or more employees. These permissions are set up by your SimplePay payroll administrator.

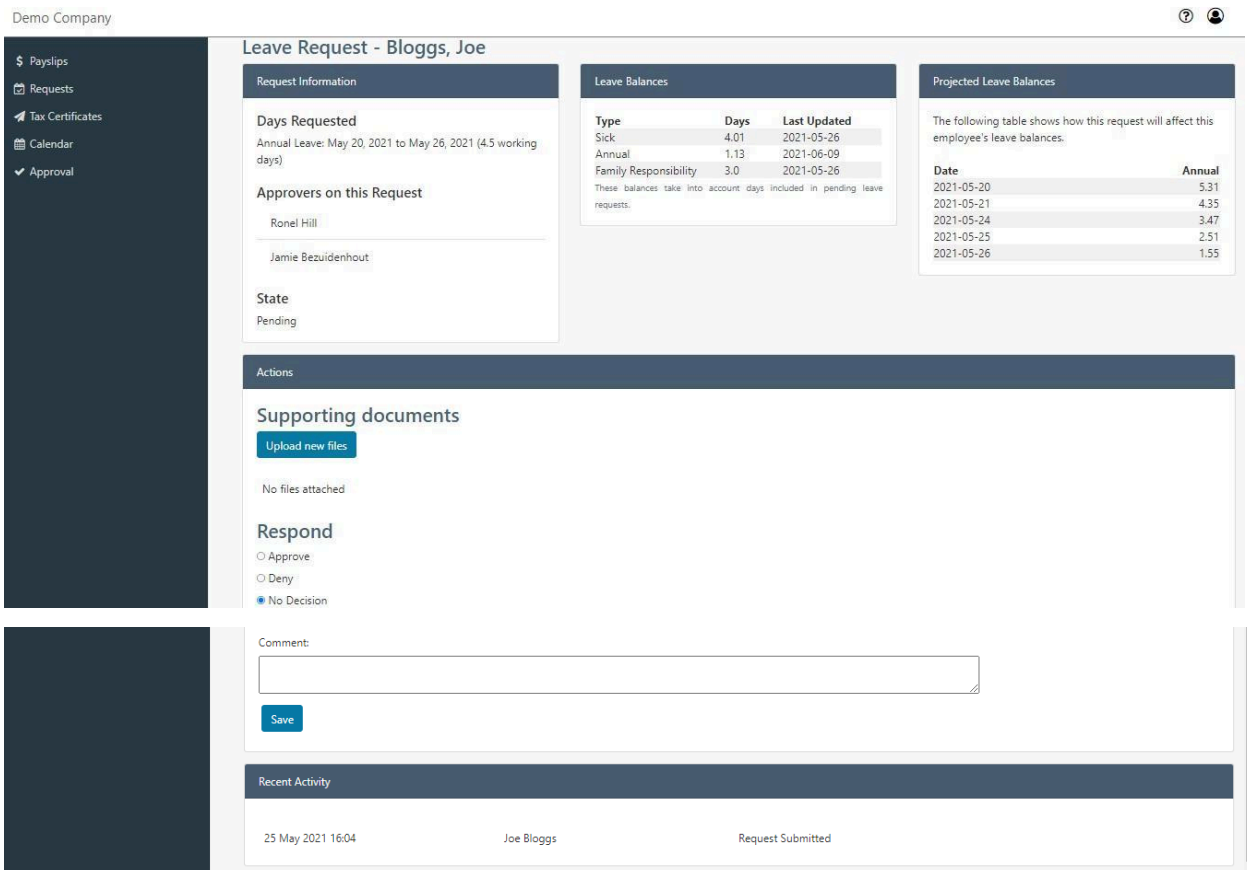
To view pending and finalised requests, click **Approval** on the left hand side taskbar of the screen. This will load the Approval page where all **Pending Requests** and **Finalised Requests** can be viewed.



The ***Type*** field indicates whether the request is related to a leave or info update.
The ***Status*** field indicates whether the request has been approved, denied or pending (and thus, requires approval).

Clicking on the blue hyperlinked status text will bring up the relevant request information. From this screen, you are able to approve or deny the relevant request.

Leave Requests



From this screen, the leave approver will be able to view different types of information pertaining to the leave request:
Request Information: The length and period of the leave, who is responsible for approving the leave and the current status of the request (pending, approved or denied)
Leave Balances: Leave balances (including the day(s) of other pending leave requests)
Projected Leave Balances: The effect of the leave request on the leave balance over the period of the leave
Actions: Upload a supporting document (if applicable), respond (approve, deny or no decision (leaves request in pending status)) and comment (if applicable)
Recent Activity: Shows the history of the leave request (when it was submitted, when it was approved/denied, etc.)

In order to process the leave request, click on one of the options under ***Respond*** (**Approve**, **Deny** or **No Decision**) then click **Save**.

Info Update Requests

From this screen, the info update approver will be able to view different types of information pertaining to the info update request:
Changes: What fields the employee has changed on their profile, what values existed in these fields previously and what changes have been made to these fields; who the approvers are on this request; and what state the request is currently in (pending, approved or denied).

Other fields of this screen are materially the same as those of the leave approval screen.
Actions: Upload a supporting document (if applicable), respond (approve, deny or no decision (leaves request in pending status)) and comment (if applicable).
Recent Activity: Shows the history of the info update request (when it was submitted, when it was approved/denied, etc.).

In order to process the info update request, click on one of the options under ***Respond*** (**Approve**, **Deny** or **No Decision**) then click **Save**.