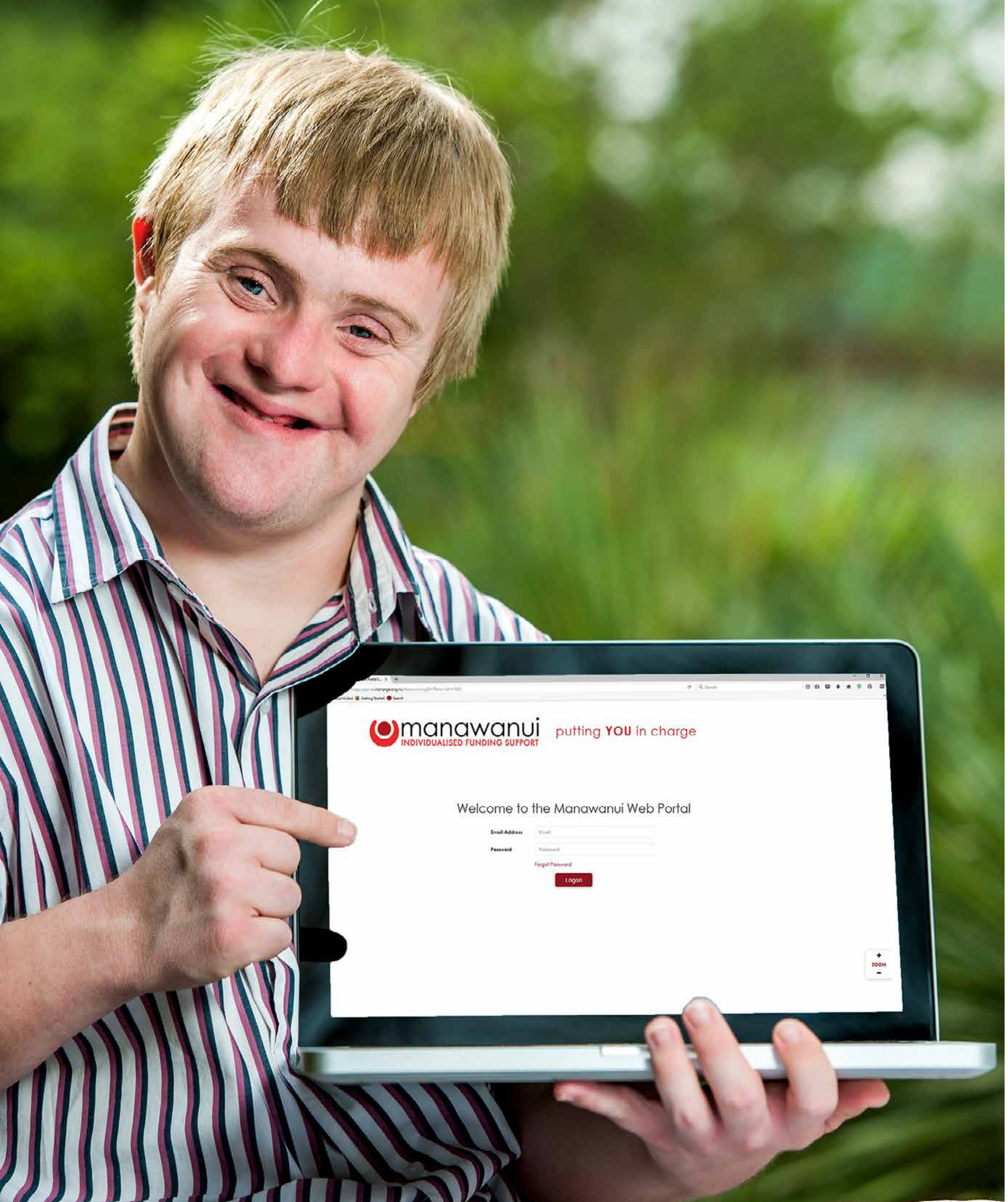



# Web Portal Manual

## For Payroll Clients

manawanui
INDIVIDUALISED FUNDING SUPPORT



# Contents


# Welcome to the Manawanui Web Portal

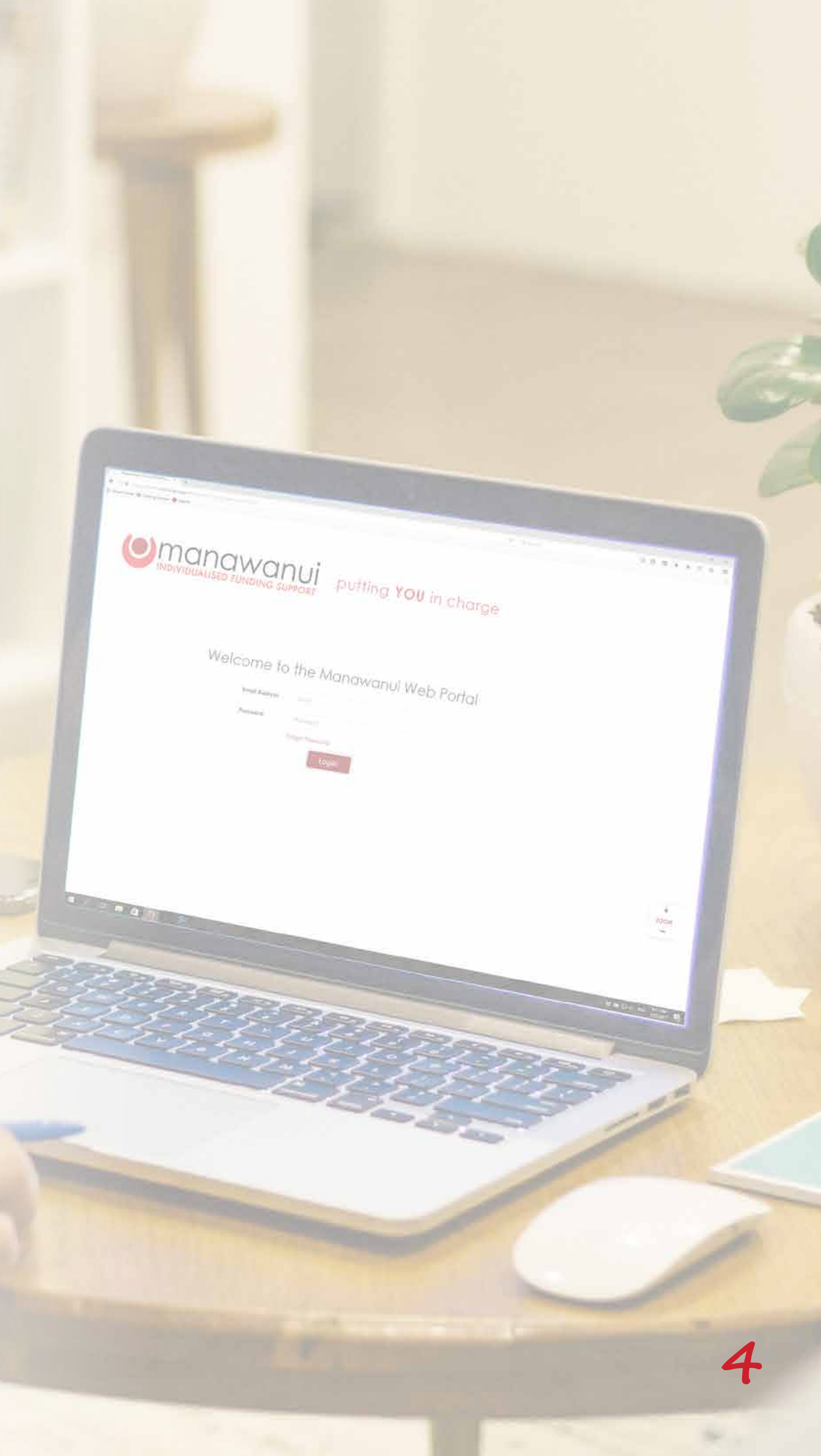
The Manawanui Web Portal is designed to enable our clients to undertake a number of tasks via the internet as well as being able to access up to date account information.

The purpose of this document is to provide an overview of the Web Portal and to provide guidance on how to use the various features in the Web Portal.

This is a dynamic document. If you click on a topic in the content you will be taken to that topic. If you click on a or icon you will be taken to the corresponding document page or website. Clicking on a screen shot with the icon will take you to the corresponding Web Portal page. You will need to login to view the page.

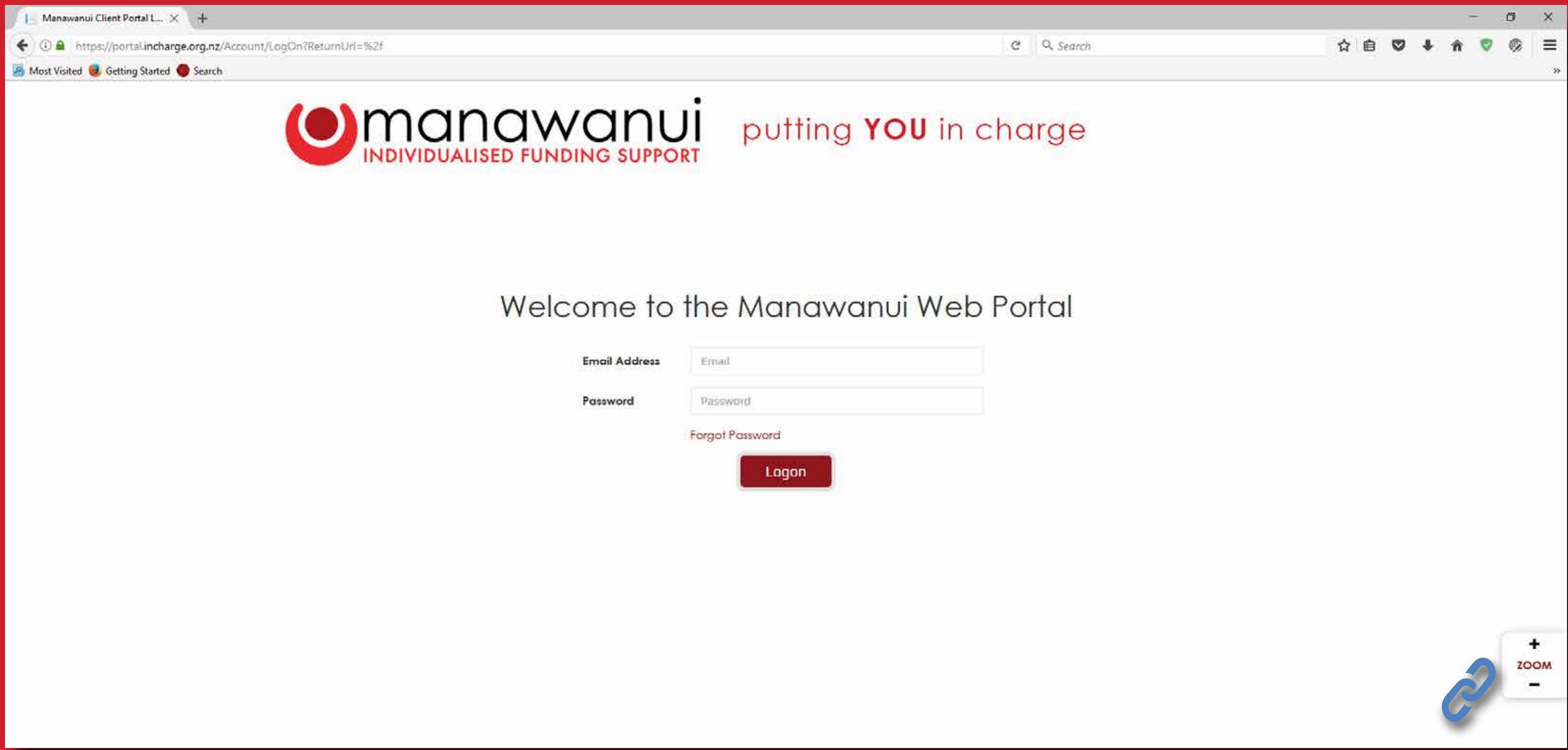
# Overview

- The Web Portal enables a range of different tasks including submission of claims, budgeting and statements.
- The Web Portal is designed to work on all widely used Internet Browsers and across devices including computers, tablets and on smart phones. Very old versions of Internet Browsers will not be compatible with the Web Portal. If you are using Internet Explorer you need to be using IE9 or later. If you are using Apple Safari, Google Chrome or Mozilla Firefox, you need to ensure that it is up to date.
- Account data in the Web Portal is updated daily with 'transactional' data for Statements being updated weekly.
- The Web Portal provides an HTTPS environment. All website traffic is secure and encrypted.
- Each user of the Web Portal will need to have their own, unique, email address for security purposes.



# Getting Started

**You can find the Web Portal at the following Web Address: https://portal.incharge.org.nz/Account/Logon**




**You can add the Web Portal as a Favourite or Bookmark in your Internet Browser by pressing the 'Control' and 'D' keys together on a Windows computer, or 'Command' and 'D' on an Apple when you are on the Login Page.**

# Web Portal Basics

When you log into the Web Portal you will be presented with your 'Home' screen. You can navigate to any of the other main screens by selecting the label for each screen.

You can view changes to the Web Portal, read the guidance material or watch the guidance video, or make contact with the Portal Support Team by using the links directly below the navigation bar.

Home | Statement | Budget | Employees & Payees | Timesheets | Mail | Profile

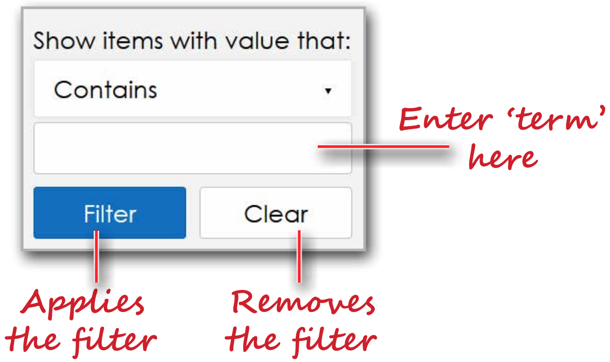
**We've made some changes.....**

**Click here for detailed guidance on using the Web Portal**

**Click here to get support**

- Please note that the Web Portal menus appear differently to the above if you are using a Smart Phone.
- You can return to the Home screen at any time by selecting Home
- You can logout of the Web Portal by selecting 'Logout' which is at the top of the screen by your name. Hello Name Logout
- If you forget your password, simply go to the Login page for the Web Portal and click on the **Forgot Password** link.

- Before your employees can enter timesheets in the Portal you need to invite them onto the Portal. Click here to go to the *'How to Invite an Employee to the Web Portal'* page.
- A **+** icon denotes that you can add a new record, such as a new employee or a timesheet, by clicking on it.
- A **v** icon denotes that there are other options available that can be selected such as alternative views of funding or mail folders.
- You can change the size of the Web Portal by using the Zoom function or you can press the 'Control' and '+' or '-' keys.
- An **X** icon denotes that you can delete an item or entry by clicking on it.
- In some screens it is possible to filter the information presented in the screen. You can do this by clicking on the filter icon. You will then be prompted to enter a 'term' to filter the data. The filter will present all records that contain that term.

# Help and Support

- Accessibility information for the Web Portal can be found by navigating to the Accessibility page at the top left corner of the Home screen.
- Each of the main screens in the Web Portal contains an information button that includes a summary of the purpose of the screen and guidance on how to use the screen. A number of screens include video guidance and the guidance for the Home screen includes a link to the User Guide for the Web Portal.
- Most of the fields and functions in the Web Portal have an 'Info:' explanation. The 'Info:' explanations contain key information on what fields and functions are for and how they should be used.
- The Web Portal makes it easy to contact your Coach to get assistance and you can do this from the Profile Screen by selecting **+Email** beside your Coaches name.
- If you find yourself '**locked out**' of the Web Portal then you should contact the Portal Support team.
- A dedicated support team has been put in place which you can call or email for support.
  - You can contact the support team using the internal mail system in the Web Portal by going to the Mail screen and selecting **+Create a Secure Mail** and choosing 'Portal Support' in the 'To' field.
  - A number of the screens in the Web Portal include a button to request support Request MIC Help that will create a message with details of what you need assistance with in the Portal.
  - You can email the Portal Support team at: Support@incharge.org.nz
  - You can call the Portal Support team via the Manawanui mainline number on 0508 462 427. Please select Option 1 and ask to be put through to the Portal Support team.

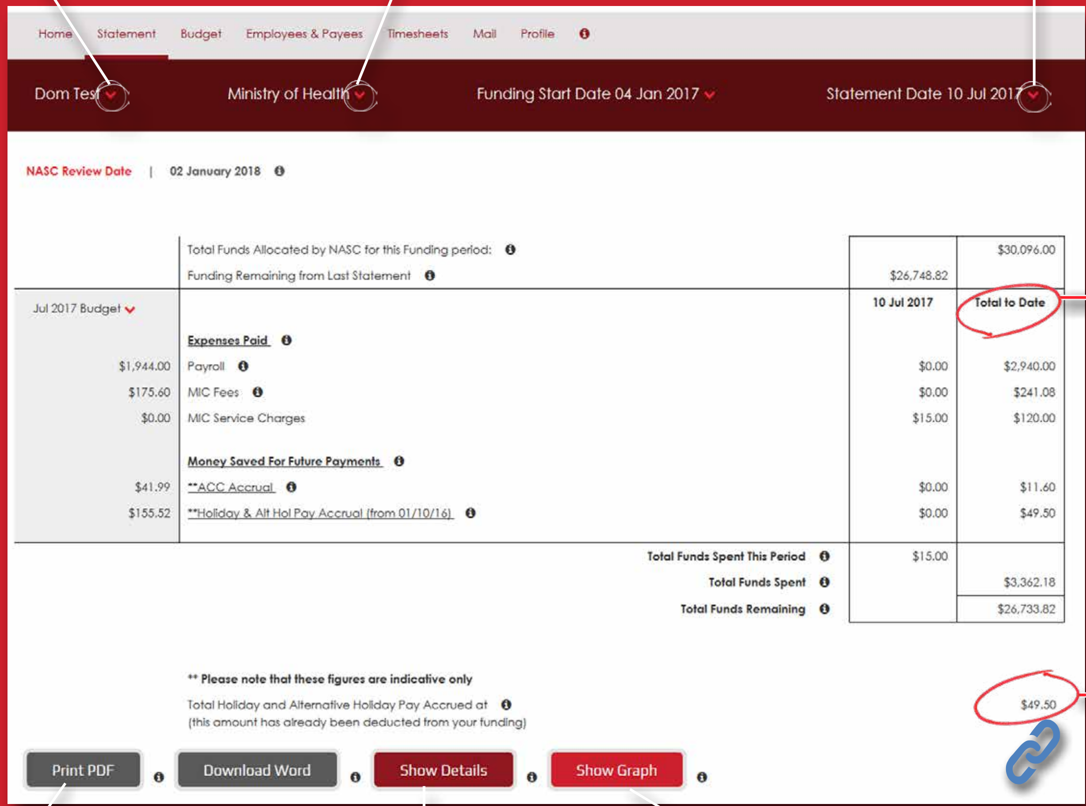
# Statement Screen

- You can access your Statement and a history of Statements in this screen.
- The Statement is updated each week on a Monday night.
- You can access an end of funding statement using from the list of Statement Dates available.

*If you are the 'Agent' for more than one person you can change accounts here*

*You can change your funding source here if you have more than one*

*View your history of past Statements and end of funding period statement from here*




*View the total spent this month versus 'to date' and check your remaining funds*

*Check what has been accrued and deducted for staff annual leave*

*Print a PDF version of your Statement*

*View detailed transactions and download them if needed*

*Click to go to details page*

*View a graph of your spending against your budget*

*Click to go to graph page*

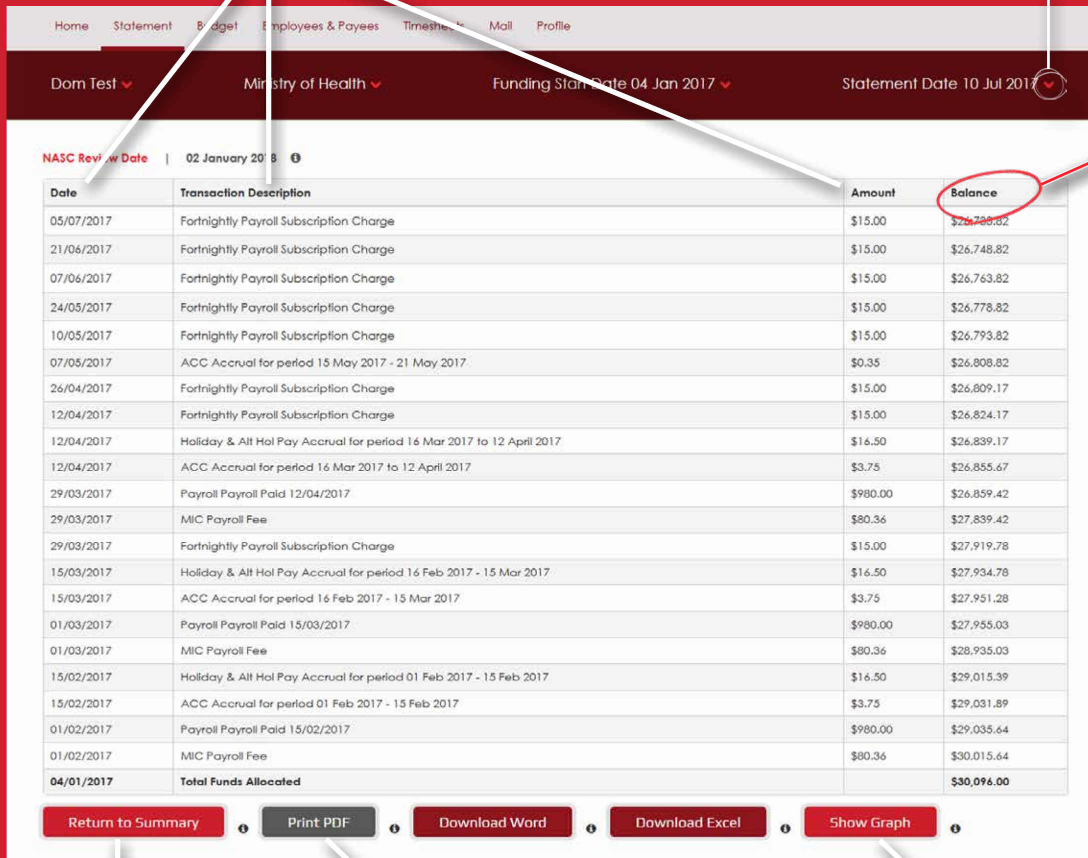
# Detailed Transaction Screen

- **View the detailed and itemised transactions that your statement is based on.**
- **Sort the information by clicking on the column Headers.**
- **Print the transactions to a PDF document or extract them to a Word Document or excel Spreadsheet.**

*Sort the data by clicking on the Column Headers*

*View your history of past Statements*

*Indicates the running balance of the Statement*




| Date | Transaction Description | Amount | Balance |
|---|---|---|---|
| 05/07/2017 | Fortnightly Payroll Subscription Charge | $15.00 | [illegible] |
| 21/06/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,748.82 |
| 07/06/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,763.82 |
| 24/05/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,778.82 |
| 10/05/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,793.82 |
| 07/05/2017 | ACC Accrual for period 15 May 2017 - 21 May 2017 | $0.35 | $26,808.82 |
| 26/04/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,809.17 |
| 12/04/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $26,824.17 |
| 12/04/2017 | Holiday & Alt Hol Pay Accrual for period 16 Mar 2017 to 12 April 2017 | $16.50 | $26,839.17 |
| 12/04/2017 | ACC Accrual for period 16 Mar 2017 to 12 April 2017 | $3.75 | $26,855.67 |
| 29/03/2017 | Payroll Payroll Paid 12/04/2017 | $980.00 | $26,859.42 |
| 29/03/2017 | MIC Payroll Fee | $80.36 | $27,839.42 |
| 29/03/2017 | Fortnightly Payroll Subscription Charge | $15.00 | $27,919.78 |
| 15/03/2017 | Holiday & Alt Hol Pay Accrual for period 16 Feb 2017 - 15 Mar 2017 | $16.50 | $27,934.78 |
| 15/03/2017 | ACC Accrual for period 16 Feb 2017 - 15 Mar 2017 | $3.75 | $27,951.28 |
| 01/03/2017 | Payroll Payroll Paid 15/03/2017 | $980.00 | $27,955.03 |
| 01/03/2017 | MIC Payroll Fee | $80.36 | $28,935.03 |
| 15/02/2017 | Holiday & Alt Hol Pay Accrual for period 01 Feb 2017 - 15 Feb 2017 | $16.50 | $29,015.39 |
| 15/02/2017 | ACC Accrual for period 01 Feb 2017 - 15 Feb 2017 | $3.75 | $29,031.89 |
| 01/02/2017 | Payroll Payroll Paid 15/02/2017 | $980.00 | $29,035.64 |
| 01/02/2017 | MIC Payroll Fee | $80.36 | $30,015.64 |
| **04/01/2017** | **Total Funds Allocated** | | **$30,096.00** |

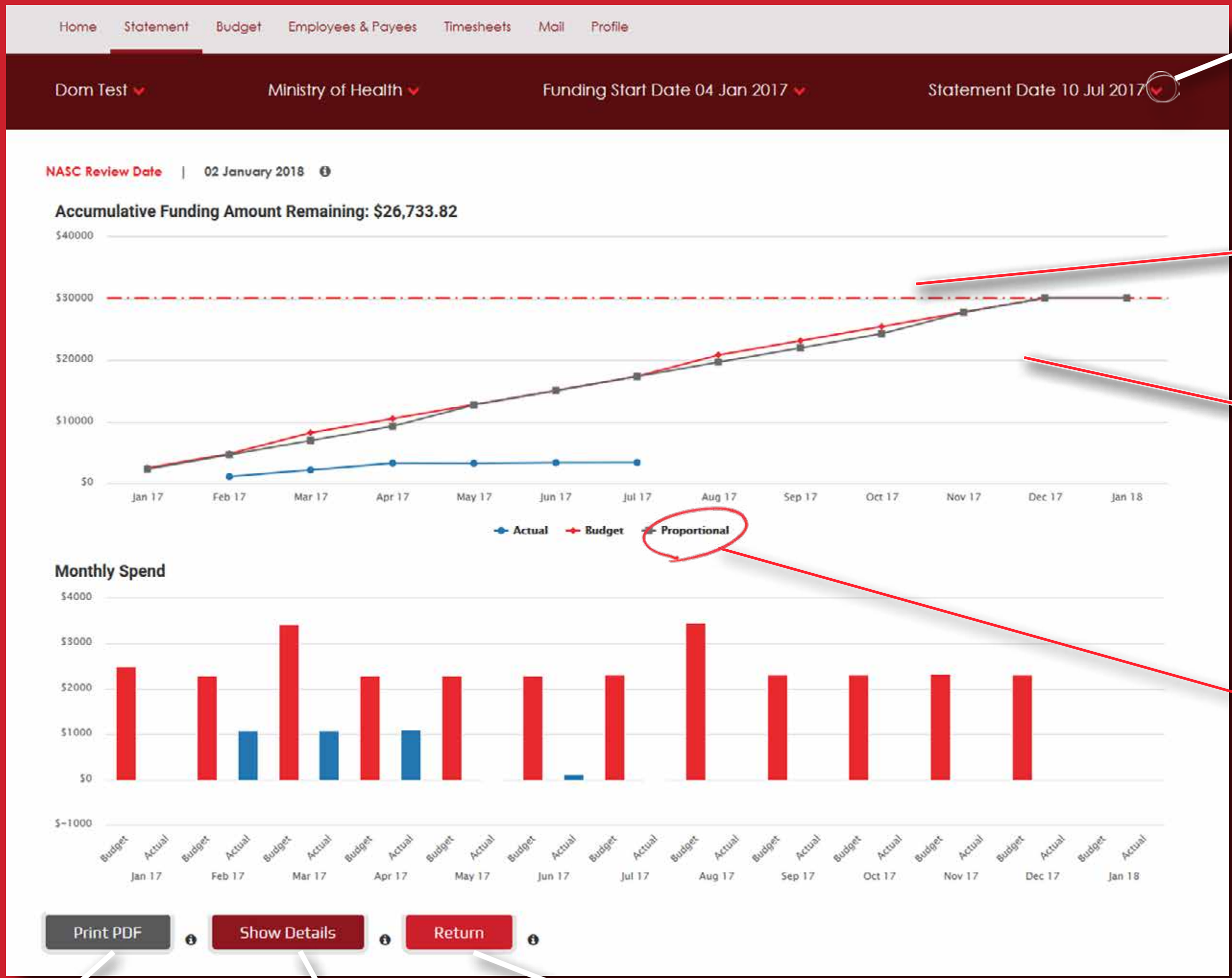
*Return to the main Statement Summary page here*

*Print to a PDF or extract the data to Excel*

*View a graph of your spending against your budget.*
*Click to go to graph page*

# Statement Graph Screen

View your history of past Statements




Indicates the amount of funding remaining

Indicates the actual spending versus budgeted

A proportional budget is added that is proportional based on the funding divided by the months

Print the graph to a PDF document

Go back to the detailed transaction screen

Return to the main Statement Summary Page

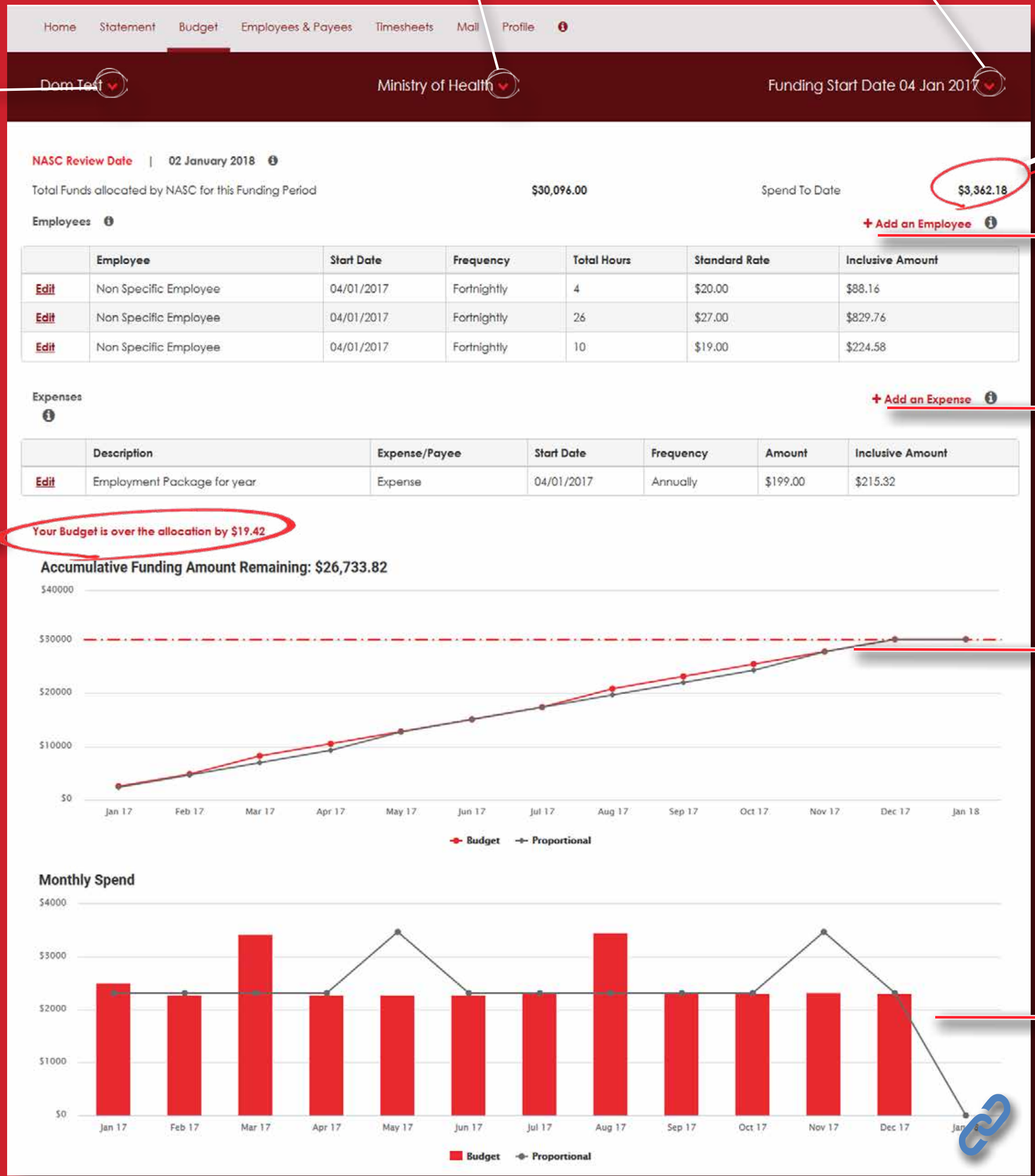
# Budget Screen

Select the funding to budget for

View a history of budgets here by viewing historical funding

If you are the 'Agent' for more than one person you can change accounts here

Check your spending to date here




Add Employees to your budget

Click to go to page

Add expenses to your budget

Click to go to page

Your budget will indicate if it is over or under your allocation

A proportional budget forecast is automatically added

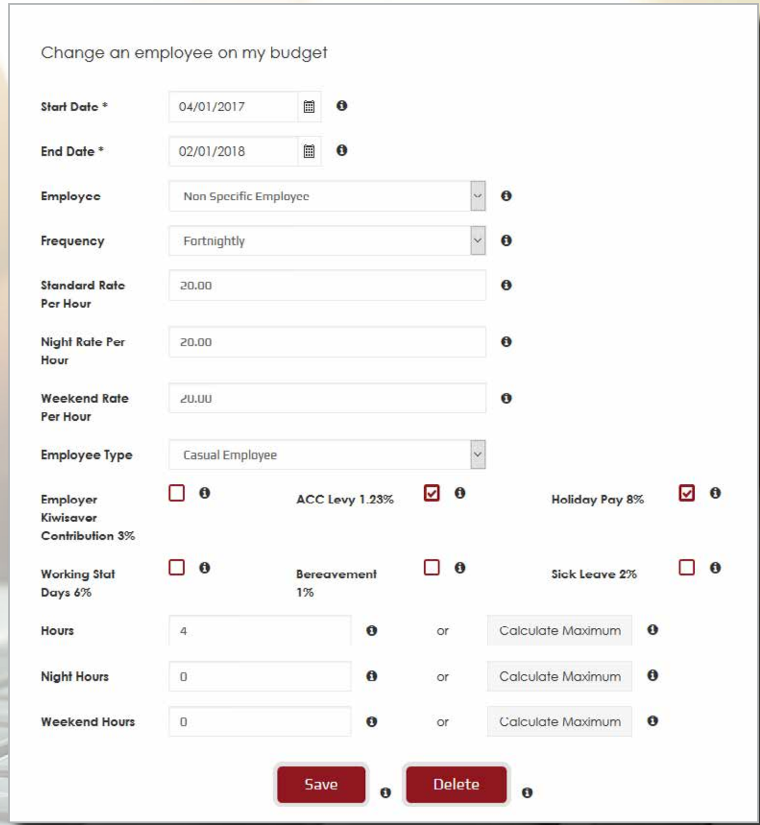
View a graph of your budget spend by month

# Notes on the Budgeting Screen

- Maximise your spending using the budget tool. Add employees and expenses to build your budget. Use 'non-specific' employees to budget for employees that are not yet known.
- You can use the '+ Add an Expense' function to add an expense for a purchase or for the costs of a Contractor or Organisation
- The budget will vary in some months where there is an extra fortnight
- A separate budget is required for each source of funding.
- A proportional budget is automatically forecast that divides your funding by the number of months in the funding period. The proportional forecast will vary in some months where there are additional pay periods that fall within that month.
- You can review and revise your budget at any time during your funding period.

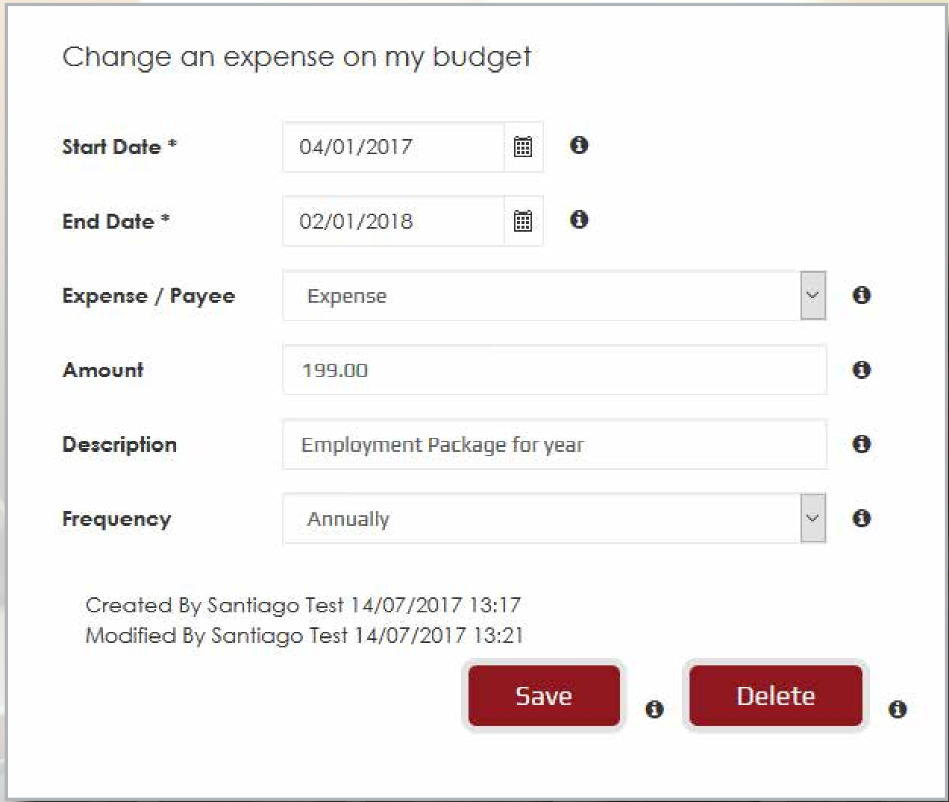
# How to add an Employee to your Budget

- To add a new employee to your budget select **+ Add Employee** on the top right hand corner of the screen.
- You will then be prompted to complete the data in the view opposite.
  - Set the Start Date and End Date for the Employee.
  - If you already have existing 'Active' employees in the Web Portal then you can select these. If you do not have any employees setup, you can select a 'Non-Specific' Employee to budget for an employee that you are planning on employing.
  - Set the working frequency for the employee.
  - Set the Rates per hour for the employee. Please note that the Portal adds additional amounts onto this rate to reflect annual leave accruals and public holidays. Some additions, such as Kiwisaver, are optional and can be excluded if relevant. Depending on the options chosen the addition add up to 20% onto the rate to create a more accurate budget.
  - Select the Employee Type. Please note that the type of employee adjusts the additional amounts added onto a persons Rate Per Hour.
  - Select optional items to add into the budget such as Kiwisaver.
  - Add the number of Hours as per the Frequency selected for the Employee. Alternatively you can use the 'Calculate Maximum' function which will calculate a maximum number of hours for that employee using up all of your remaining budget. If you are using multiple rates of pay the calculate maximum will calculate the maximum hours available based on only the rate that you choose.
  - Select Save once entered.



# How to add an Expense to your Budget

- To add a new expense to your budget select **+ Add Expense** on the right hand corner of the screen.
- You will then be prompted to complete the data in the view opposite.
  - Set the Start Date and End Date for the Expense. Please note that you can add recurring expenses if required.
  - Select whether the expense item is an Expense or if is related to an existing Contractor or Organisation.
  - Set the amount of the Expense.
  - Add a brief description so you can remember what the Expense is.
  - Identify the Frequency of the Expense which could be just 'Once' or a range of periodic options.
  - Select Save once entered.
- For guidance on what types of expenses you can add to your Budget please contact your Coach.



# Employees & Payees Screen

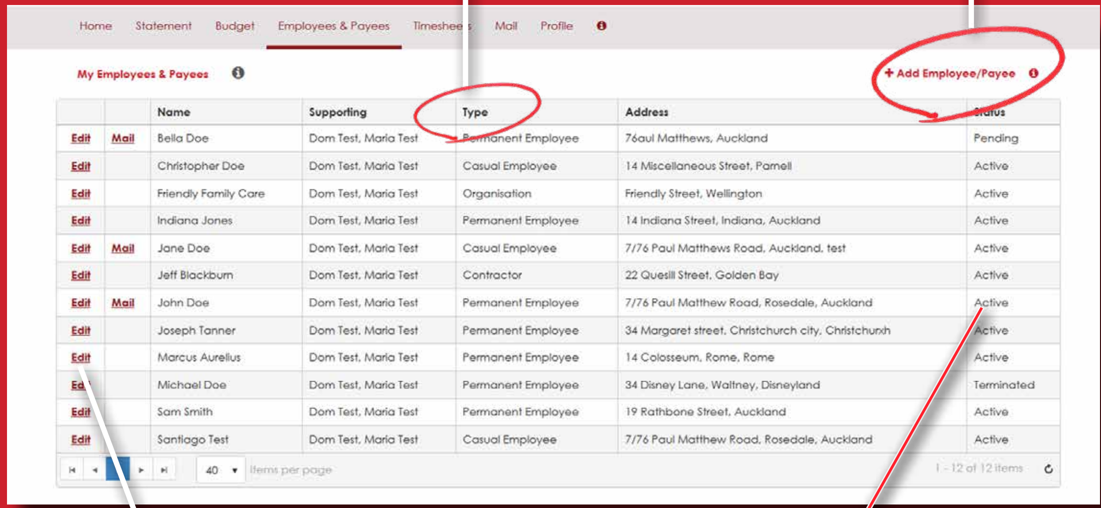
- The Employees & Payees screen shows all Employees that exist in our Payroll system as well as any Contractors or Organisations you have setup in the Web Portal.

- The Web Portal enables you to manage your Employees & Payees including the ability to:
    - Add a new Employee or Payee
    - Update the details of an existing Employee or Payee
    - Terminate an Employee or Payee
    - Request a Holiday Cash Out for an Employee

- Please note that you need to invite your employees to the Web Portal before they can login and use the Web Portal. Employees can only submit timesheets and access their payslips in the Web Portal.

View the type of Employee or Payee

Add a new Employee or Payee




| | | Name | Supporting | Type | Address | Status |
|---|---|---|---|---|---|---|
| Edit | Mail | Bella Doe | Dom Test, Maria Test | Permanent Employee | 76aul Matthews, Auckland | Pending |
| Edit | | Christopher Doe | Dom Test, Maria Test | Casual Employee | 14 Miscellaneous Street, Parnell | Active |
| Edit | | Friendly Family Care | Dom Test, Maria Test | Organisation | Friendly Street, Wellington | Active |
| Edit | | Indiana Jones | Dom Test, Maria Test | Permanent Employee | 14 Indiana Street, Indiana, Auckland | Active |
| Edit | Mail | Jane Doe | Dom Test, Maria Test | Casual Employee | 7/76 Paul Matthews Road, Auckland, test | Active |
| Edit | | Jeff Blackburn | Dom Test, Maria Test | Contractor | 22 Quesill Street, Golden Bay | Active |
| Edit | Mail | John Doe | Dom Test, Maria Test | Permanent Employee | 7/76 Paul Matthew Road, Rosedale, Auckland | Active |
| Edit | | Joseph Tanner | Dom Test, Maria Test | Permanent Employee | 34 Margaret street, Christchurch city, Christchurch | Active |
| Edit | | Marcus Aurelius | Dom Test, Maria Test | Permanent Employee | 14 Colosseum, Rome, Rome | Active |
| Edit | | Michael Doe | Dom Test, Maria Test | Permanent Employee | 34 Disney Lane, Waltney, Disneyland | Terminated |
| Edit | | Sam Smith | Dom Test, Maria Test | Permanent Employee | 19 Rathbone Street, Auckland | Active |
| Edit | | Santiago Test | Dom Test, Maria Test | Casual Employee | 7/76 Paul Matthew Road, Rosedale, Auckland | Active |

View the details of an existing Employee or Payee by selecting Edit or select Mail to send a message to your Employee or Payee in the Web Portal

View the Status of an Employee or Payee.

| | |
|---|---|
| Active | Employee or Payee is actively working and are active in the Web Portal. |
| Pending | Employee or Payee has been invited to the Web Portal but has not yet logged in. |
| Inactive | Employee or Payee is not yet Active in the Web Portal. |
| Terminated | Employee or Payee is no longer employed. |

# Employees Detail Screen

- To update the details for an employee just update the fields that need to be updated and select 'Save'. The update will then be processed through to our Payroll System within 24 hours. Changes to Employee details should be done when they are required.

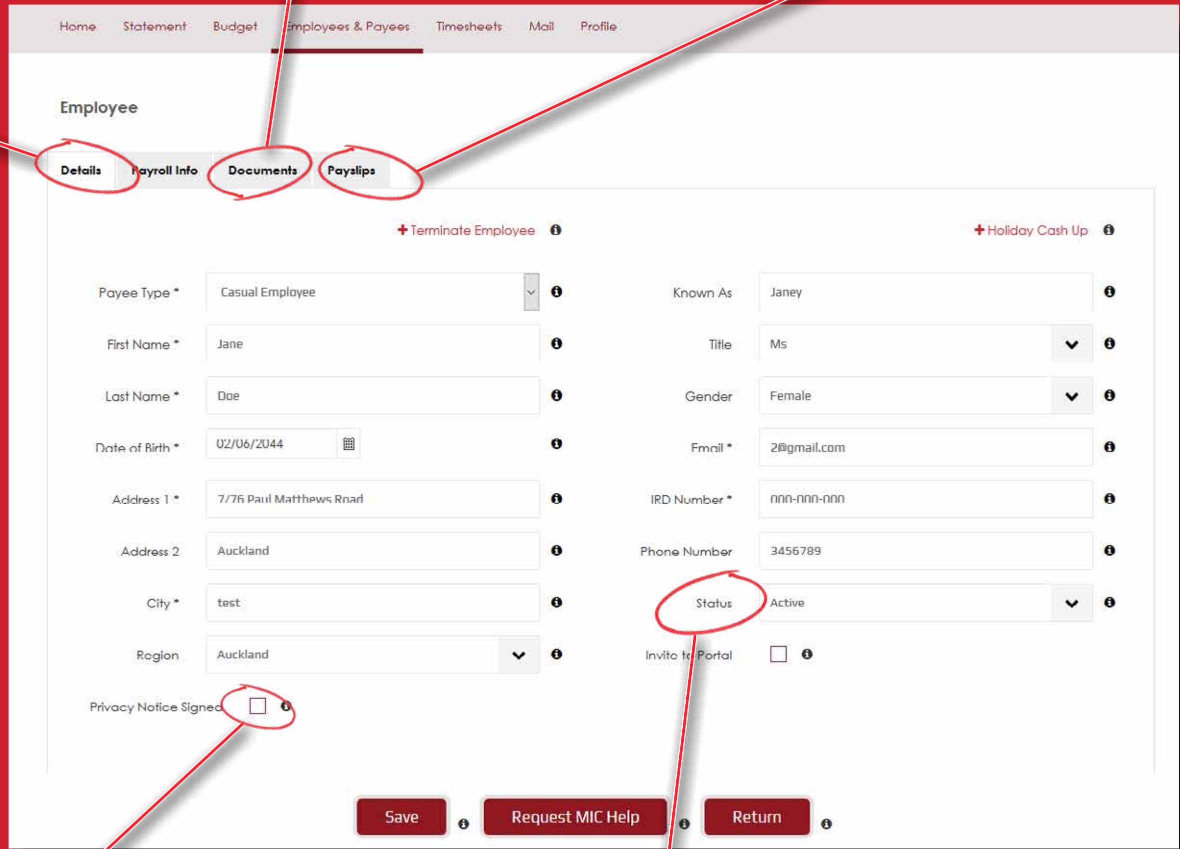
- Please note that for pre-existing Employees the bank account and tax code data will not be visible in the Web Portal, you do not need to re-enter the information.

- For guidance on items like Tax Codes, Pay Rates and Kiwisaver please read the 'Info:' guidance, or speak with your Coach.

*Once completed, key employment documents, such as Tax Code and Kiwisaver forms, can be added here. Links to key forms can also be found here*

*You can view the payslips for the Employee here*

*You can update your employee's bank account and wage details here*

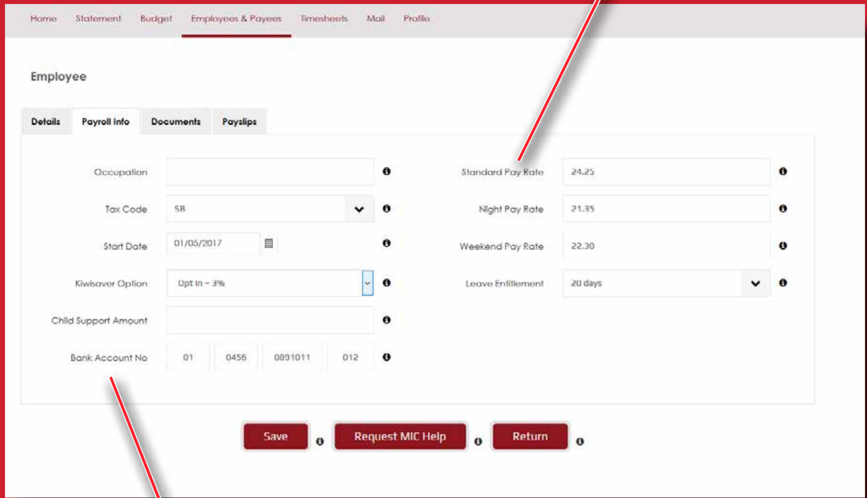



*We have added a flag to prompt you to complete a privacy notice with the Contractor*

*Employment Status indicates whether the Employee is: Active, Terminated or Pending where pending means they have been invited to the Web Portal and they are yet to login*

# Employees Detail Tabs

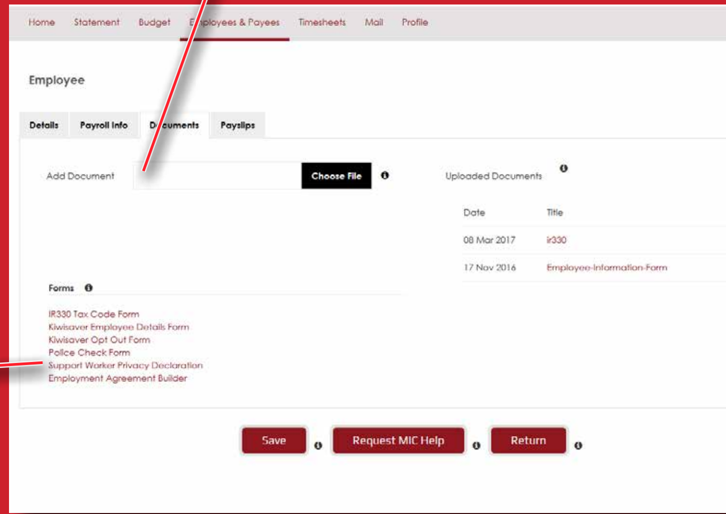
You can update your employee's wage rates here




You can update your employee's bank account details here

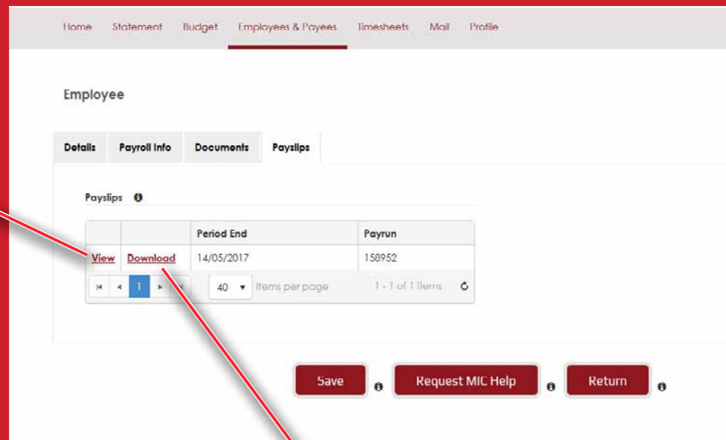

This window will 'pop-up' when you 'Save' your changes. Please indicate the date that the change to the employees details should take effect.

Completed forms can be uploaded here




Key forms can be downloaded from here

You can view your employee's payslips here




You can download a payslip to save it, email it or print it

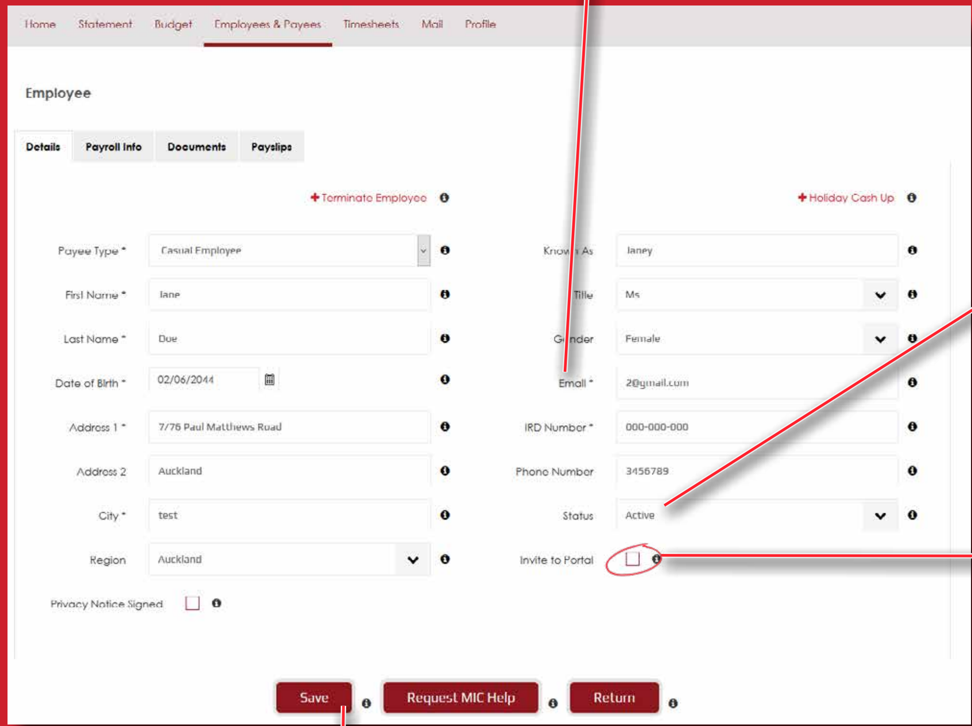
# How to Invite an Employee to the Web Portal

- **Employees need to be invited onto the Web Portal for them to enter their timesheets. Before they can be invited, their email address needs to be confirmed and entered if it's not already in the Web Portal.**

- **Check the 'Invite onto Portal' box and then select 'Save' and your employee will receive an invitation to the Web Portal to their email address. The Employment Status will update to Pending to indicate that the invitation has been set. Once the employee has logged into the Web Portal then their Status will update to 'Active'.**

- **Please Note: Employees need to have their own, unique email address. They cannot have the same email address as yourself or another employee.**

1 Ensure the email address is correct. Update if necessary.




Note: Once invited, the Status will be 'Pending' until the Employee logs into the Portal

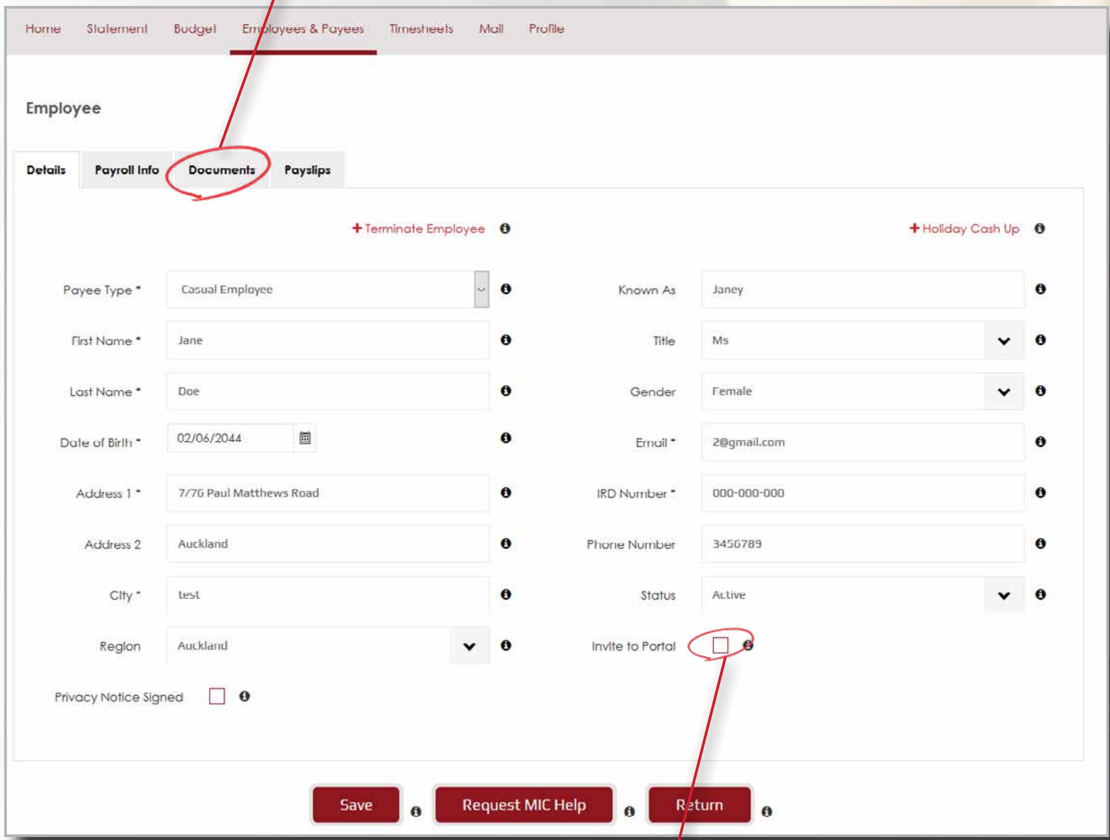
2 Check the 'Invite onto Portal 'box

3 Select Save to Enter the effective date and set it to todays date. Select Save to send the invite

# How to add a New Employee in the Web Portal

- To add a new Employee select **+Add Employee** on the Employee screen. You will then be presented with the screen and tabs opposite to enter the details of the Employee. Key employment documents can be added on the Documents tab. Once you have entered the new Employees details, completed and attached the forms, select Save and the new Employees details will be sent to the Payroll Team. You can then invite the new Employee to the Web Portal by checking the 'Invite onto Portal' box on the details tab and selecting Save (see 'How to Invite an Employee to the Web Portal').
- Timesheets can be entered for a new Employee as soon as they are created in the Web Portal. Please allow 48 hours after adding a new Employee in the Web Portal before submitting their first timesheet to the Payroll team for processing.
- For guidance on things such as Tax Codes, Pay Rates and Kiwisaver please read the 'Info:' guidance or speak with your Coach.
- Please Note: Employees need to have their own email address and they cannot have the same email address as yourself or another employee.

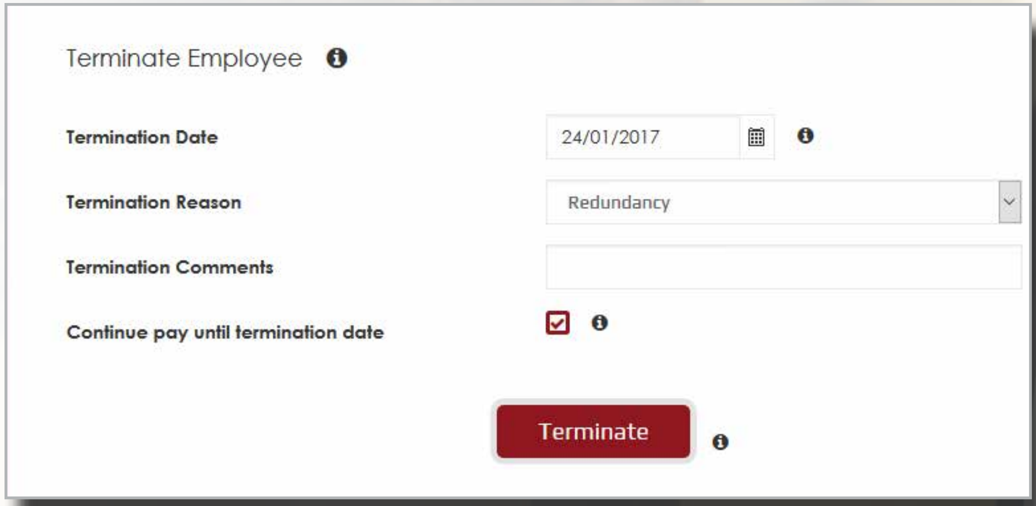
Once completed, key employment documents, such as Tax Code and Kiwisaver forms, can be added here. Links to key forms can also be found here




Select the 'Invite onto Portal' flag to invite the new employee to the Web Portal

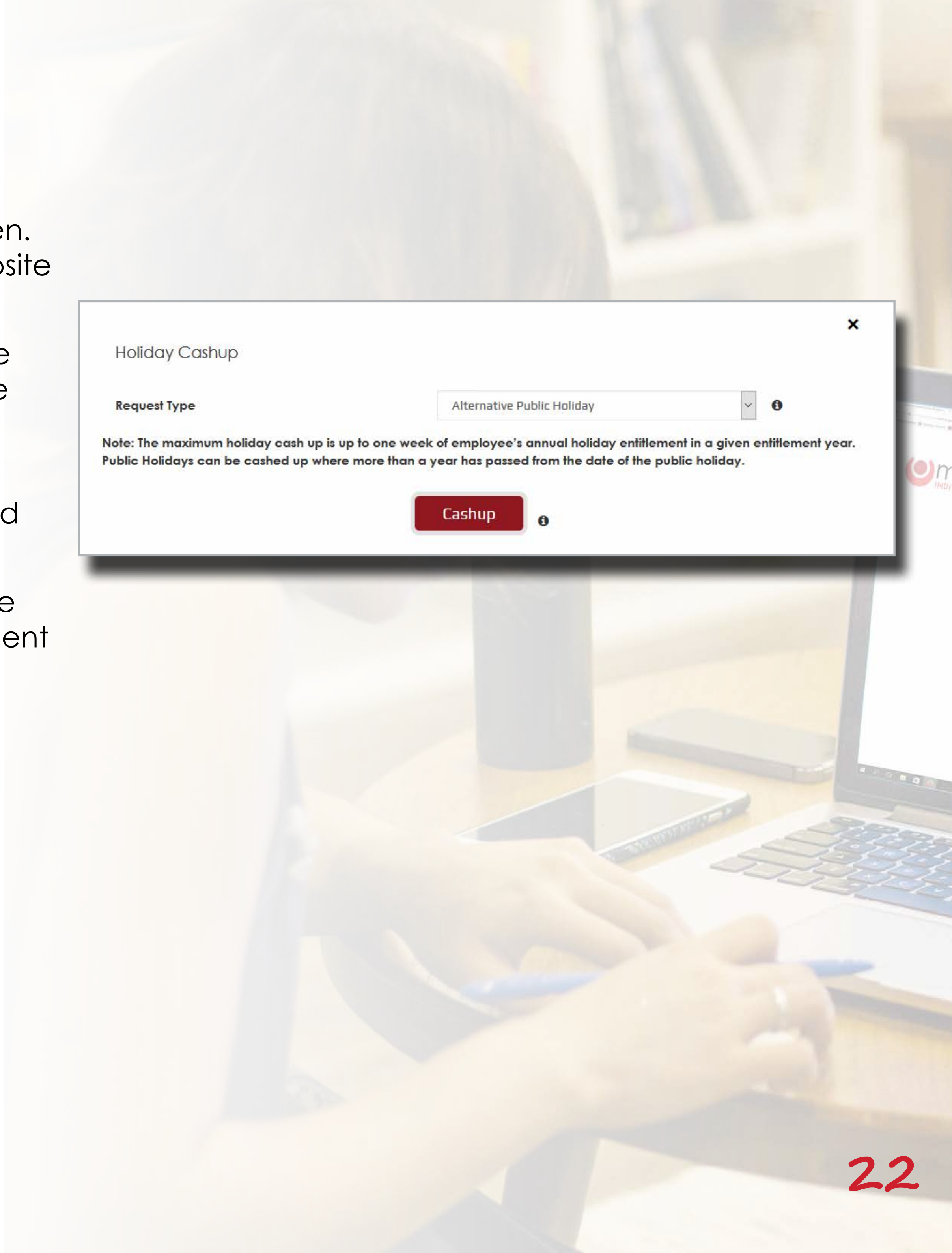
# How to Terminate an Employee in the Web Portal

- To terminate an Employee select **+ Terminate Employee** at the top of the Employee Details screen. You will then be presented with the screen opposite to enter the termination information.
- Set the termination date which is the date that the employment will finish.
- Please fill in the termination reason and add any comments that are relevant to the processing of the termination request.
- Check the 'Continue pay until termination date' box to indicate whether the employee should continue to be paid until they are terminated.
- Once the information is entered, select the **Terminate** button. Once terminated, the Employee will no longer be able to use the Web Portal and you will not be able to submit a timesheet for them via the Web Portal.
- For guidance on terminating employees please read the 'Info:' guidance or speak with your Coach.
- **Important: All timesheets should be submitted for an Employee before you terminate them.**



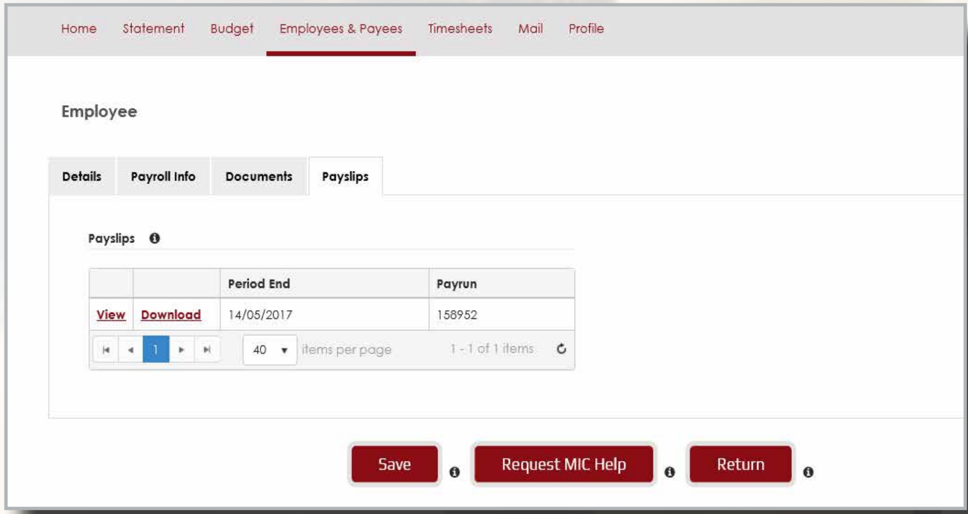
# How to Request a Holiday Cash Up in the Web Portal

- To request a Holiday Cash Up select **+ Holiday Cashup** at the top of the Employee details screen. You will then be presented with the screen opposite to select the type of cash up request.
- Select the type of cash up request which can be either Alternative Public holiday or Annual Leave and then select Cashup.
- The Payroll team will receive your request, verify that there is a cash up entitlement  available and then contact you to progress the process.
- **Note:**  The maximum holiday cash up is up to one week of the Employee’s annual holiday entitlement in a given entitlement year. Public Holidays can only be cashed up where more than a year has passed from the date of the public holiday.



# How to find the Payslip for an Employee

- To find a payslip for an Employee go to the Payslips tab in the Employees details.
- In the Payslips tab select the View function to view the payslip or select the Download function if you want to download the payslip to save it, print it or to email it.
- **Note:** The Web Portal will show a payslip once an Employee is paid. We are working to bring the complete history of payslips into the Web Portal in the near future.

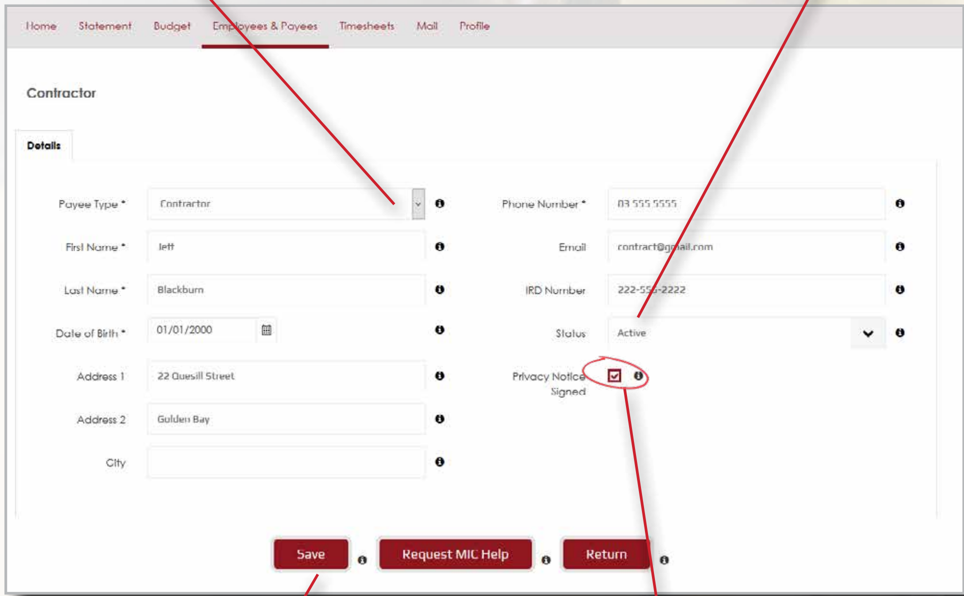


# Adding a Contractor into the Web Portal

- Contractors can be added into the Web Portal so that they can be linked to an expense on a claim. The information required to be captured for a Contractor aligns with the Ministry of Health verification requirements and the mandatory fields that are required include the First Name, Last Name, Date of Birth and the Phone Number.

Set the status to 'Active' so that the Contractor can be selected against an expense. You can set this to 'Terminated' to indicate they no longer work for you.

Select Contractor as the Payee Type




Once the details are added select Save

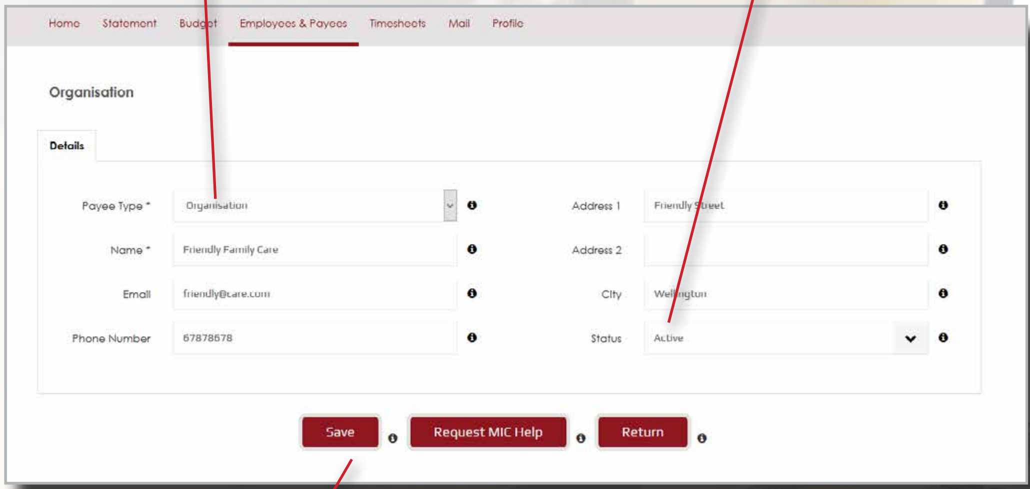
We have added a flag to remind you to complete a privacy notice with the Contractor

# Adding an Organisation into the Web Portal

- Organisations can be added into the Web Portal so that they can be linked to an expense on a claim.  The information required to be captured for an Organisation aligns with the Ministry of Health verification requirements and only the name of the organisation is mandatory to be entered.

Select Organisation as the Payee Type

Set the status to 'Active' so that the Organisation can be selected against an expense.  You can set this to 'Terminated' to indicate they no longer provide services to you.



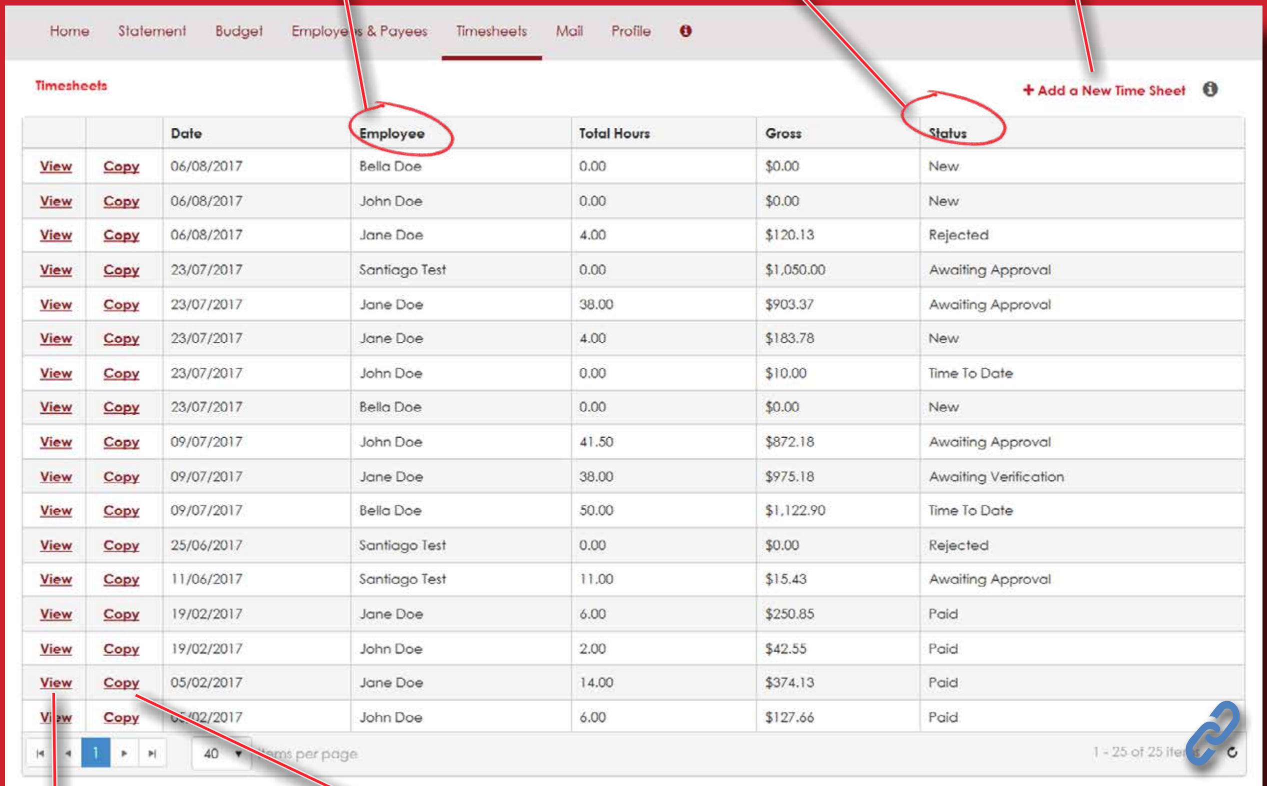

Once the details are added select Save

# Timesheet Screen

Indicates who the timesheet is for

Track the Status of a timesheet

Add a new timesheet here



Home Statement Budget Employees & Payees Timesheets Mail Profile

Timesheets

+ Add a New Time Sheet

| | | Date | Employee | Total Hours | Gross | Status |
|---|---|---|---|---|---|---|
| View | Copy | 06/08/2017 | Bella Doe | 0.00 | $0.00 | New |
| View | Copy | 06/08/2017 | John Doe | 0.00 | $0.00 | New |
| View | Copy | 06/08/2017 | Jane Doe | 4.00 | $120.13 | Rejected |
| View | Copy | 23/07/2017 | Santiago Test | 0.00 | $1,050.00 | Awaiting Approval |
| View | Copy | 23/07/2017 | Jane Doe | 38.00 | $903.37 | Awaiting Approval |
| View | Copy | 23/07/2017 | Jane Doe | 4.00 | $183.78 | New |
| View | Copy | 23/07/2017 | John Doe | 0.00 | $10.00 | Time To Date |
| View | Copy | 23/07/2017 | Bella Doe | 0.00 | $0.00 | New |
| View | Copy | 09/07/2017 | John Doe | 41.50 | $872.18 | Awaiting Approval |
| View | Copy | 09/07/2017 | Jane Doe | 38.00 | $975.18 | Awaiting Verification |
| View | Copy | 09/07/2017 | Bella Doe | 50.00 | $1,122.90 | Time To Date |
| View | Copy | 25/06/2017 | Santiago Test | 0.00 | $0.00 | Rejected |
| View | Copy | 11/06/2017 | Santiago Test | 11.00 | $15.43 | Awaiting Approval |
| View | Copy | 19/02/2017 | Jane Doe | 6.00 | $250.85 | Paid |
| View | Copy | 19/02/2017 | John Doe | 2.00 | $42.55 | Paid |
| View | Copy | 05/02/2017 | Jane Doe | 14.00 | $374.13 | Paid |
| View | Copy | [illegible]/02/2017 | John Doe | 6.00 | $127.66 | Paid |

1 40 items per page 1 - 25 of 25 ite

View the details of the timesheet by clicking on 'View'

Copy a timesheet for a new fortnight by clicking on 'View' – see below for further guidance on copying timesheets

## Understanding the Status Column

**New**
A newly created timesheet

**Time to Date**
A timesheet that is in progress and being added to

**Awaiting Verification**
Your Employee has certified a timesheet which you need review and verify

**Awaiting Approval**
The timesheet has been verified and sent to the Payroll team for review and approval

**Ready for Payroll**
The timesheet has been approved by the Payroll Team and is being processed by the payroll system

**Paid**
The timesheet has been paid

## Notes of the Timesheets Screen

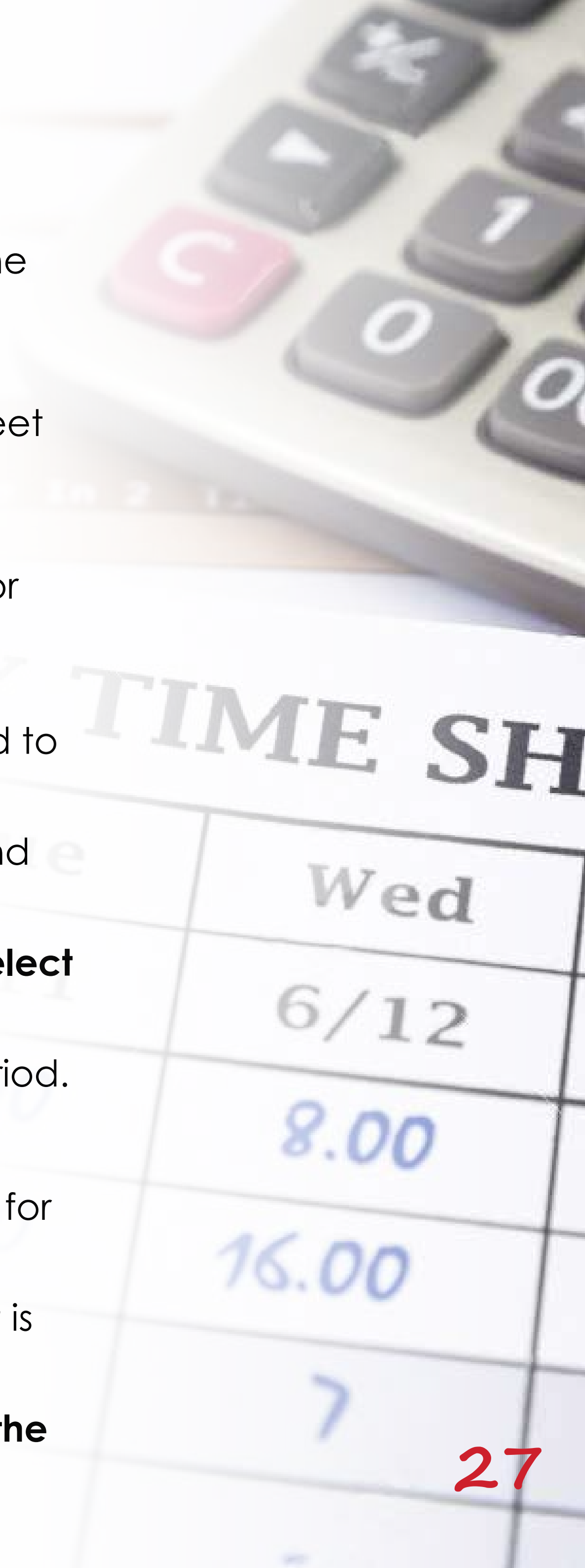
The process for submitting timesheets follows **three** key steps in the Web Portal:

1. An Employee enters the timesheet and 'Certifies' the timesheet. Certifying the timesheet submits it to the Employer for review and approval.

2. The Employer then reviews and 'Verifies' the timesheet. Verifying the timesheet submits it to the Payroll Team for review and approval.

3. The Manawanui Payroll team will then review and 'approve' the timesheet for processing and payment.

- Once a timesheet has been certified or verified it cannot be updated. If you need to make a change after submission please contact the Helpdesk.
- It is possible for the Employer to edit an Employee's timesheet before verifying it and sending it to Payroll for processing.
- To add a new timesheet select **+Add a New Time Sheet**. **Please ensure that you select the correct fortnight for the timesheet.**
- You or your employees can only submit one timesheet per employee for a Pay Period.
- You can only enter timesheets for 'Active' employees.
- Please ensure that all data has been entered into a timesheet before submitting it for approval to the Payroll team.
- The Web Portal uses the pay rate that has been set on the Employee record and it is not possible to change the pay rate on a timesheet.
- **The person who is named on the timesheet is the person who will be paid for both the time entered and the expenses that are on the timesheet.**

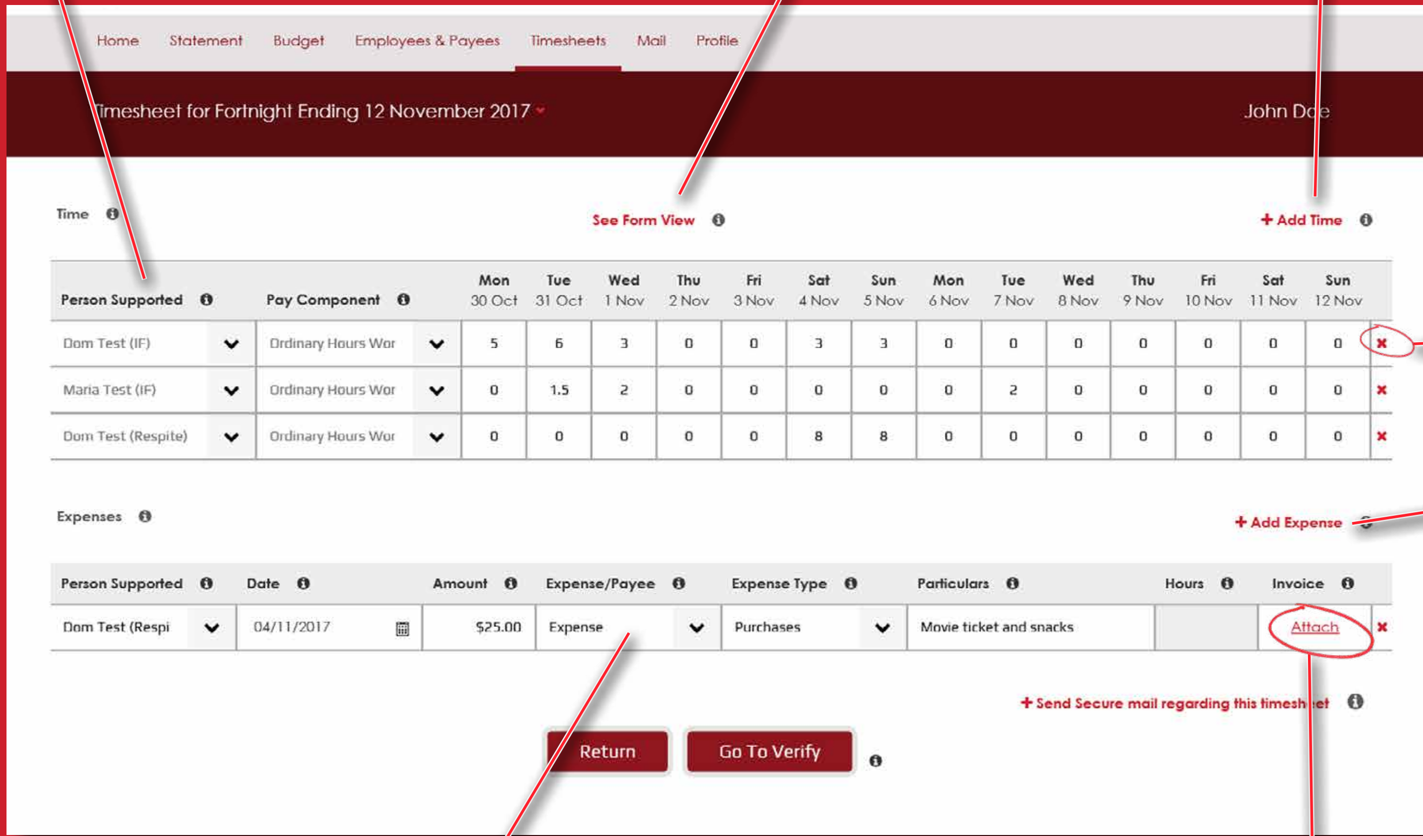


# How to Enter a Timesheet in Tabular View

You need to select the Person Supported and then the Pay Component before you can enter any hours

You can switch between the tabular view and the form view using the See form View and See Tabular View functions

Adds a new time entry




Select 'X' to delete an entry in the timesheet

Adds a new Expense item

You can choose if an expense item is just an Expense or if it is related to a Contractor or Organisation you already have entered into the web Portal

Attach an invoice or receipt by selecting 'Attach'

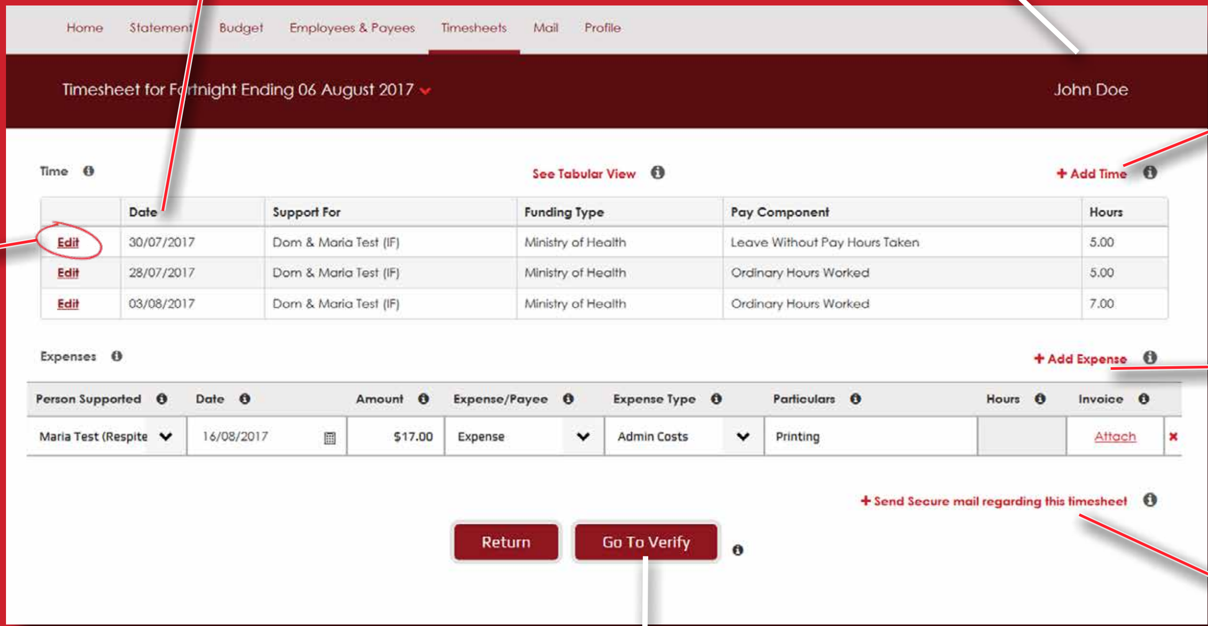
# How to Enter a Timesheet in Form View

Indicates the date that the timesheet is for

Indicates the Employee that the timesheet is for

Adds a new time entry

Open and edit an existing time entry




Adds a new Expense entry

Sends a message relating to the timesheet to the Payroll team or your Coach

Once all entries are added, click 'Go to Verify' to verify the timesheet and send it to the Payroll team

# Explanation of Pay Components for Payroll

X

A Pay Component is the type of pay to be allocated to the work that has been done. It is required to inform our Payroll System what type of pay should be assigned for an Employee.


## Leave Components

**ACC 1st week taken**

Injured at work. Employer pays the first week of ACC.

**Alternative holiday hours taken**

Worked on a public holiday and is now taking leave accrued from working on that public holiday. (Casual Workers are not entitled to claim against this.)

**Annual leave taken**

Taking holiday hours earned or accrued in a year.

**Bereavement leave hours taken**

Bereavement of a close family member. (Three days entitlement for immediate family and one day entitlement for extended family, close friends, etc.)

**Leave without pay hours taken**

Has no leave to claim. Leave being entered but without any pay.

**Parental leave taken**

Employee is entitled to and has taken Parental leave.

**Public holiday hours taken**

A public holiday fell on a normal working day for the Employee and the Employee took the holiday instead of working.

**Sick leave taken**

Taking sick leave. (Employees are typically entitled to 5 days of sick leave per year.)

## Ordinary Working Hours Components

**Ordinary hours worked**

Represents a typical working day / hours worked in a day.

**Ordinary pay - Night hours**

Hours worked during the night.

**Ordinary pay - Weekend**

Hours worked on a weekend.

**Public holiday worked x 1.5**

Worked on a public holiday and entitled to be paid at time and a half.

# To add expense entries to the timesheet, please follow these steps:

Please note that the person who is chosen on the timesheet is the person who will be paid for both the time entered and the expenses that are on the timesheet. To add expense entries to the timesheet:

1 Select **+Add Expense** and you will be presented with the screen opposite.

2 Enter the fields for the expense entry adding an entry for each expense item:

a. **Person Supported:** This indicates who the expense has been incurred for. In some cases there may be more than one option to select if there are multiple sources of funding and the funding is identified in brackets next to the name of the person being supported.

b. **Date:** Indicates the date that the expense was incurred.

c. **Expense/Payee:** select if the entry is an expense or if its related to a Contractor or Organisation.

d. **Amount:** The total cost of the Expense.

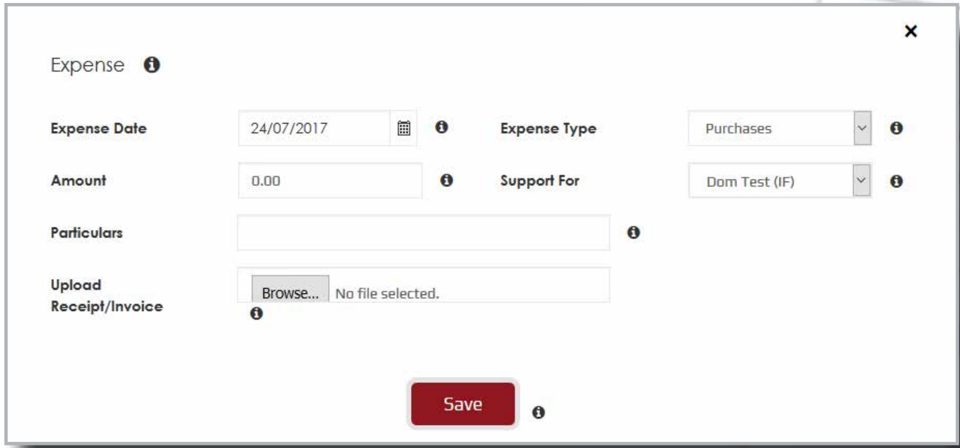
e. **Particulars:** A description of the Expense.

f. **Expense Type:** Classifies the type of Expense.

g. **Attach:** Receipt/Invoice, you can add a receipt or an invoice to the expense item including the ability to add a picture of a receipt/invoice.

MORE

3 Once you have completed the timesheet entry then select Go to Certify to Save the record.



## To submit the timesheet to your Employer for review and Verification:

(Note: this applies to Employees)

Once all time and expense entries have been recorded, the next step as an Employee is to Certify the timesheet and this can be done by selecting the **Go to Certify** button under the timesheet. Once this button is selected the timesheet will be sent to the Employer for review and verification. Please note that it is not possible to update the timesheet once it is Certified although your Employer can adjust it if they have not already verified it.

## To submit the timesheet to Payroll for processing:

(Note: this applies to Employers)

Once all expense entries have been recorded, or if you are reviewing a timesheet that has been submitted by an Employee, the next step as an employer is to Verify the timesheet and this can be done by selecting the **Go to Verify** button under the timesheet.

Once this button is selected the timesheet will be sent to the Payroll team for review, approval and processing. Please note that it is not possible to update the timesheet once it is verified although your Coach can adjust it or the Payroll team can 'reject' the timesheet back to you so you can adjust it and then re-submit it. Please note that when an Employee 'certifies' a timesheet, the Web Portal will send you a notification email to advise that there is a timesheet waiting for review in the Web Portal.

# Copying a Timesheet

You can make a  copy of an existing timesheet.  This will copy all of the content of the timesheet for a specific Employee.

The steps to copy a timesheet are:

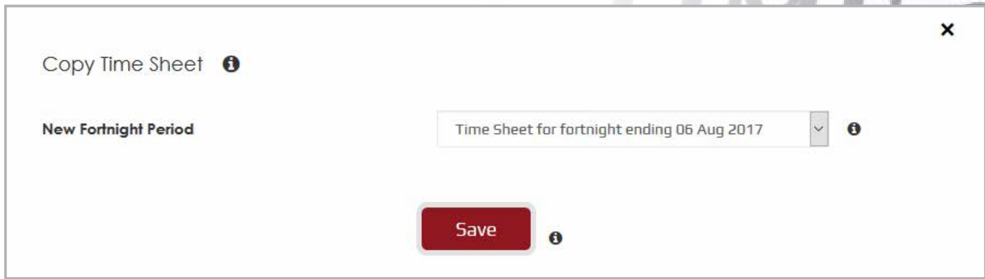
1. Select the Copy function on the timesheets screen beside the timesheet that you want to copy.

2. You will then be prompted to select the fortnight for the new timesheet that will be created.

3. Once the timesheet is copied, please verify the entries and make adjustments as required.   Please ensure that **the dates are correct** for the new fortnight on the time and expense entries.


Timesheets

| | | Date | Employee |
|---|---|---|---|
| View | Copy | 06/08/2017 | Bella Doe |
| View | Copy | 06/08/2017 | John Doe |
| View | Copy | 06/08/2017 | Jane Doe |

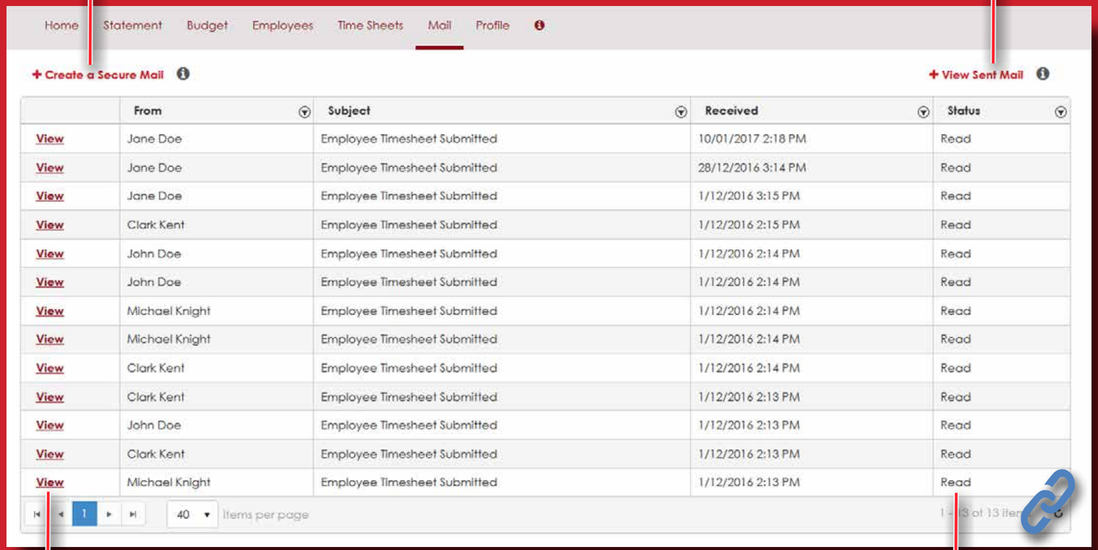


# Mail Screen

**The Web Portal has an internal 'Secure Mail' system that can be used to communicate with your Coach, the Helpdesk, Portal Support, the Payroll team and your Employees. When you receive a message in the Web Portal, the Web Portal will send you an email notification to advise you. Mail messages that have not been read will appear in bold text and will be identified as 'unread' in the Status column.**

*Create a new message by clicking here*

*View your sent mail items here*




*Open and view a mail by selecting 'View'*

*Indicates the Status of the mail. Unread mail will be identified as 'Unread'*

# Viewing Messages

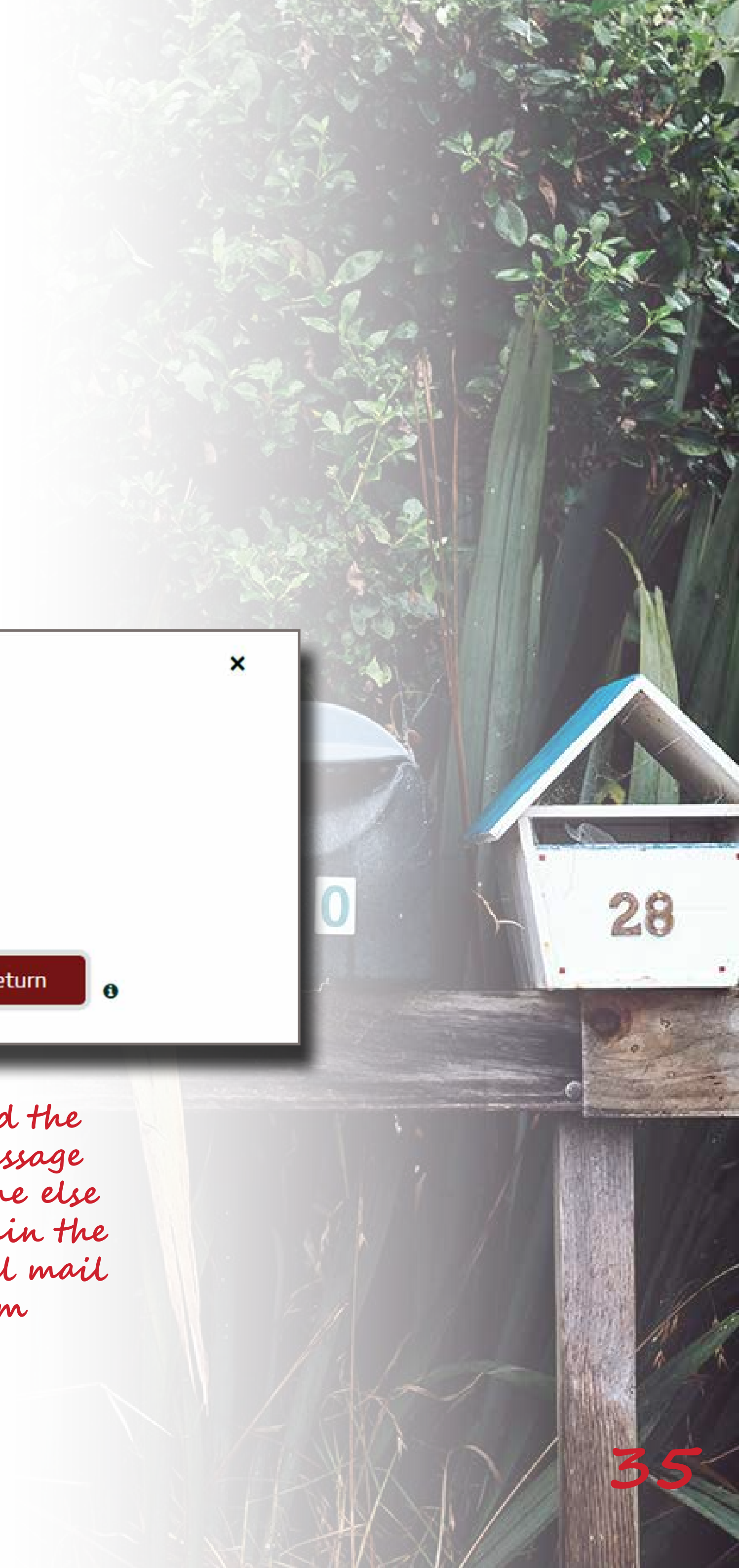
To view a mail message, click on **View** and the message will be opened in the view below.  The example below is a mail message received when a timesheet was submitted by an employee.  In this example mail message, you can go to the related timesheet by selecting '**To view the timesheet click here**'.

**Note:** It is not possible to attach documents to a mail message in the Web Portal.


Enables you to 'Action' a mail message.  It will then be removed from your inbox in the Web Portal

Reply to the Sender

Forward the mail message to someone else only within the Web Portal mail system



# Profile Screen

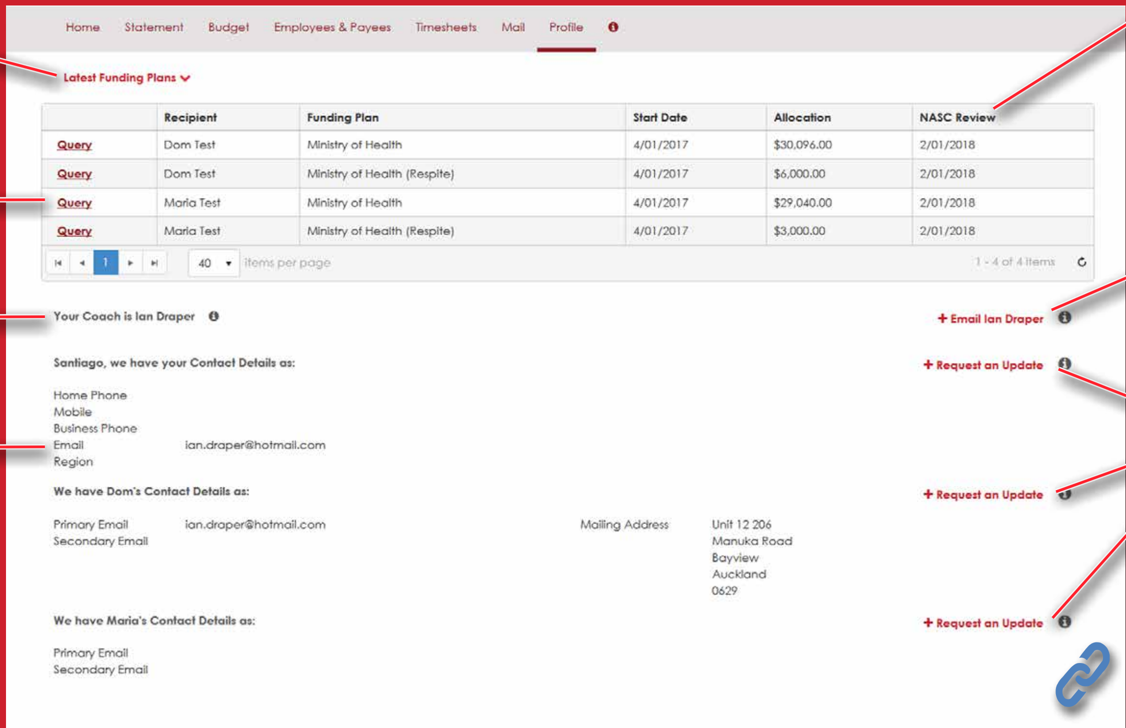
**You can view your key account information in the Web Portal and update it if needed. The Profile screen also shows details of your funding as well as who your Coach is.**

View past funding plans by clicking here

Select 'Query' to send an email relating to your funding

Your Coach

Your contact information




Shows a summary of key information about your funding including the NASC Review date

Email your Coach by clicking here

Request an update to your contact details by clicking here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