

SimplePay

EMPLOYEE SELF-SERVICE GUIDE

Getting Started

Viewing and Downloading Payslips

Submitting Leave Requests

Updating Personal Information

Viewing and Downloading Tax Certificates

Viewing the Leave Calendar

Approving/Denying Leave and Basic Info Requests

Contents

EMPLOYEE SELF-SERVICE GUIDE

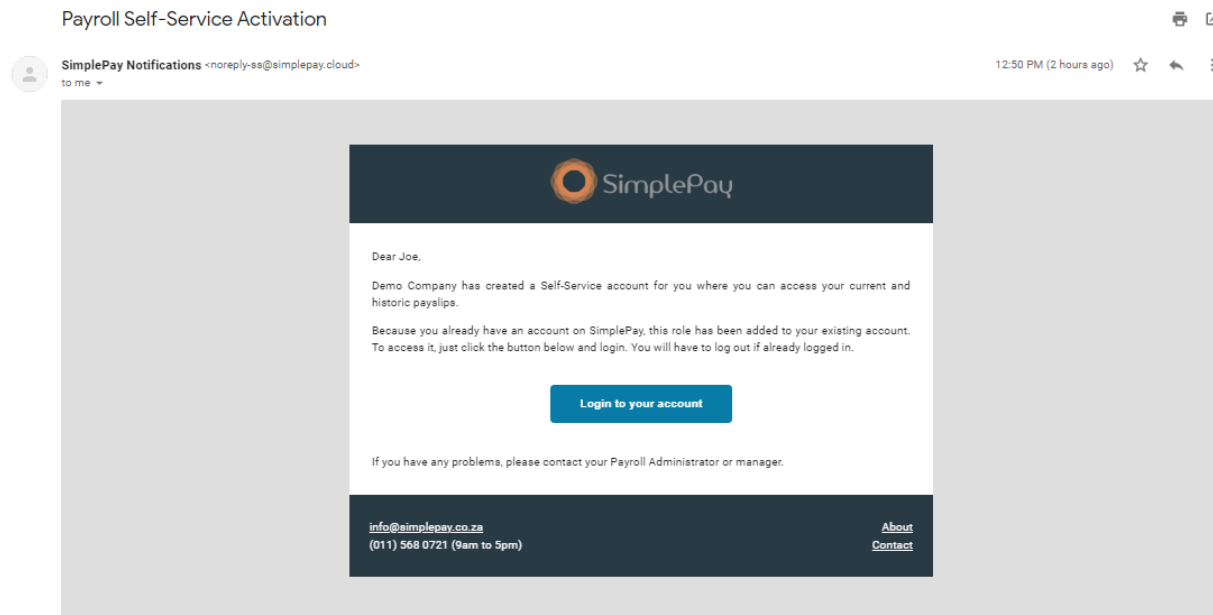
Getting your Self-Service Account Set Up	2
Viewing/Downloading Payslips	3
Requesting/Submitting Leave Requests	3
Updating Personal Information	5
Viewing/Downloading Tax Certificates	7
Viewing the Leave Calendar	8
Leave and Basic Info Update Request Approval	10
Leave Requests	11
Info Update Requests	12

Getting your Self-Service Account Set Up

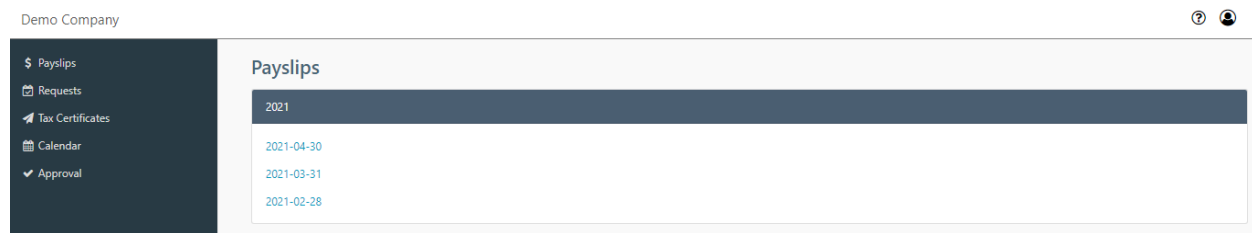
Employees that have had email addresses linked to their account and have had the Self-Service functionality enabled for their user will have access to the following self-service features:

- 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:

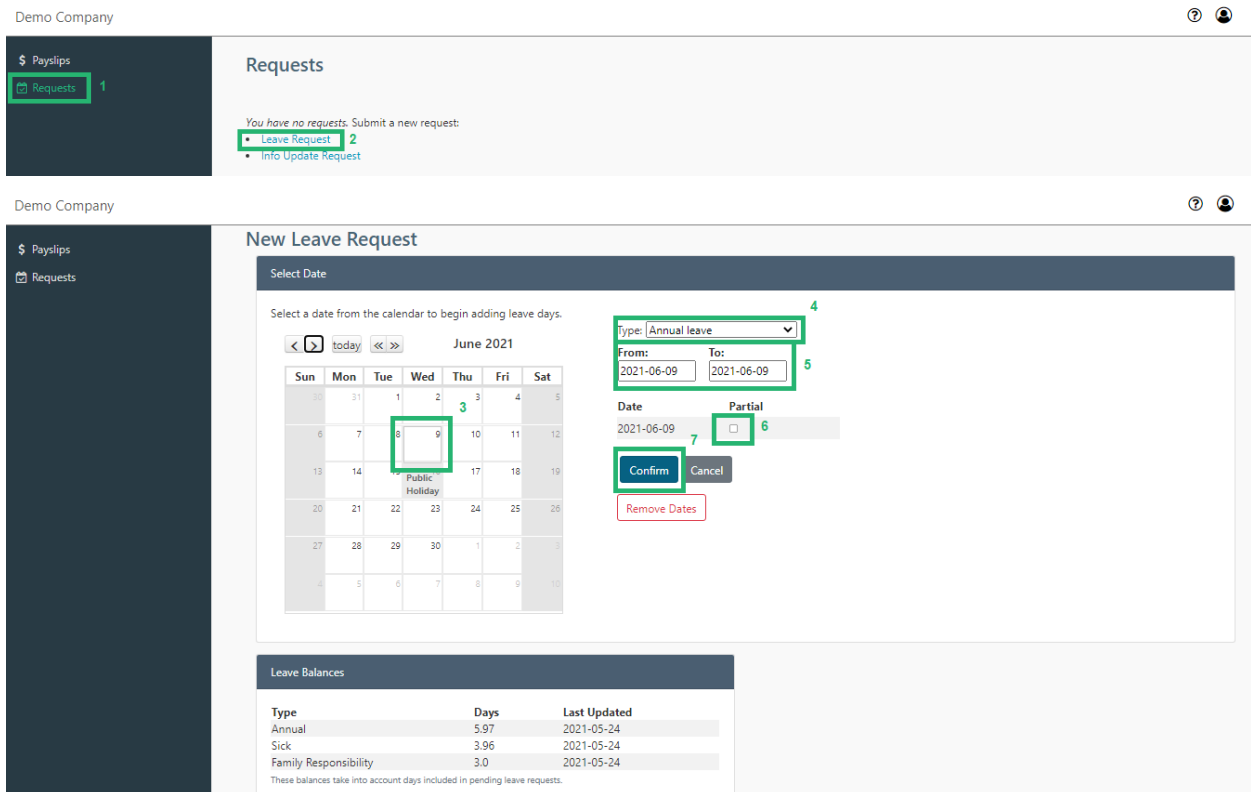
The visibility of each of these items will depend on the access your company's payroll administrator has provided you with. If you have **Approval** access, you are responsible for approving one or more employees' leave and/or basic info update requests.

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



The screenshot shows two parts of the SimplePay interface. The top part is the 'Requests' screen for 'Demo Company'. It has a sidebar with 'Payslips' and 'Requests' (1). The main area says 'You have no requests. Submit a new request:' with links for 'Leave Request' (2) and 'Info Update Request'.

The bottom part is the 'New Leave Request' form. It has a sidebar with 'Payslips' and 'Requests'. The main area is titled 'Select Date' and says 'Select a date from the calendar to begin adding leave days.' It shows a calendar for June 2021 with the 9th highlighted (3). To the right, there are fields for 'Type: Annual leave' (4), 'From: 2021-06-09' (5), 'To: 2021-06-09' (5), and a 'Date' field with '2021-06-09' (7) and a 'Partial' checkbox (6). There are 'Confirm', 'Cancel', and 'Remove Dates' buttons.

Below the calendar is a 'Leave Balances' table:

Type	Days	Last Updated
Annual	5.97	2021-05-24
Sick	3.96	2021-05-24
Family Responsibility	3.0	2021-05-24

These balances take into account days included in pending 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.

Demo Company ? 👤

Paylips
Requests

New Leave Request

Request Details

This request will have to be approved by any of the following:
Ronel Hill, Jamie Bezuidenhout

Adding: 1 Annual leave dates (1 working days) [\(details\)](#)

Supporting Documents (if applicable) [Upload new files](#)

Optional message to leave approver:

[Save](#) 8

Projected Leave Balances

The following table shows how this request will affect this employee's leave balances.

Date	Annual
2021-06-09	5.63

- 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**.

Demo Company ? 👤

👉 Payslips

📅 Requests

Requests

Show 10 entries Search:

Requested On	Type	Details	Status
2021-05-25	Leave	Annual Leave: June 9, 2021 (1 working day)	Pending Cancel

Showing 1 to 1 of 1 entries Previous 1 Next

Submit a new request:

- [Leave Request](#)
- [Info Update 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

Demo Company ? 👤

👉 Payslips 1

📅 Requests

Requests

You have no requests. Submit a new request:

- [Leave Request](#)
- [Info Update Request](#) 2

- 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**

\$ Payslips
📅 Requests

New Info Update Request

Personal Details

First Names

Last name

Date of Birth

Date of Appointment

Identification type

Email

Optional, unless self-service is enabled

Payment method

Residential Address

Unit number Complex

Street number Street

Suburb or district

City or town

Code

Postal Address

Same as Residential

Line 1

Line 2

Line 3

Code

Other Statutory Info

Income Tax Number

[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)

Demo Company ? 👤

\$ Payslips
📁 Requests

New Info Update Request

Request Details

This request will have to be approved by any of the following:
Ronel Hill, Jamie Bezuidenhout

Changes

From To

Supporting Documents (if applicable) Upload new files

Optional message to info update approver:

Save
Edit

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.

Demo Company ? 👤

\$ Payslips
📁 Requests

Request submitted ✕

Info Update Requests

Show 10 entries Search:

Requested On	Details	Status	
2021-05-25	Street Number: 1, Same As Physical: true, Suburb Or District: Suburbia, Street Or Farm Name: Victory Road	Pending	Cancel

Showing 1 to 1 of 1 entries Previous 1 Next

[Submit Info Update Request](#)

Viewing/Downloading Tax Certificates

Demo Company ? 👤

\$ Payslips
📁 Requests
📄 Tax Certificates

Tax Certificates

Show 10 entries Search:

Date	Type	View
2021-01-01 to 2021-12-31	IR8A	📄

Showing 1 to 1 of 1 entries Previous 1 Next

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

Demo Company ? 👤

- 👉 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✔ Approval

Leave Overview

Displaying dates for 1 calendar year, click [show history](#) to view the historic data

May 2021 week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26 Public Holiday	27	28	29	30	1 Public Holiday
2	3	4	5	6 Olivia May	7	8
9 Olivia May	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

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 who's 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.

Demo Company

- 🏠 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✓ Approval

Leave Overview

Displaying dates for 1 calendar year, click [show history](#) to view the historic data

< > today << >>
week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26 Public Holiday	27	28	29	30 Public Holiday	1
2	3	4	5	6	7	8
Olivia May						
9	10	11	12	13	14	15
Olivia May		Marco Basson				
16	17	18	19	20	21	22
Marco Basson		Nonhlanhla Mzomi		Joe Bloggs (pending)		Greg Morris
23	24	25	26	27	28	29
Nonhlanhla Mzomi		Vernon Kok				
Greg Morris		Joe Bloggs (pending)				
30	31	1	2	3	4	5
Greg Morris		Vernon Kok				

Olivia May
2021-05-06 to 2021-05-14

Annual Leave: 3 days
Family responsibility Leave: 1 day
Sick Leave: 5 days

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.

Demo Company

- 🏠 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✓ Approval

Leave Overview

Displaying dates for 1 calendar year, click [show history](#) to view the historic data

< > today << >>
week month

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26 Public Holiday	27	28	29	30 Public Holiday	1
2	3	4	5	6	7	8
Olivia May						
9	10	11	12	13	14	15
Olivia May		Marco Basson				
16	17	18	19	20	21	22
Marco Basson		Nonhlanhla Mzomi		Joe Bloggs (pending)		Greg Morris
23	24	25	26	27	28	29
Nonhlanhla Mzomi		Vernon Kok				
Greg Morris		Joe Bloggs (pending)				
30	31	1	2	3	4	5
Greg Morris		Vernon Kok				

Joe Bloggs
2021-05-24 to 2021-05-26

Annual Leave: 3 days

Pending Requests
Leave Request

Leave and Basic Info Update Request Approval

Demo Company ? 👤

- 📄 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✔ Approval

Approval

Pending Requests

Show entries Search:

Requested On	Requester	Type	Details	Status	
2021-05-25	Bloggs, Joe	Leave	Annual Leave: May 20, 2021 to May 26, 2021 (4.5 working days)	Pending	Delete
2021-05-25	Bloggs, Joe	Info Update	Joe Bloggs: Street Number, Same As Physical, Suburb Or District, Street Or Farm Name	Pending	Delete
2021-05-25	Bloggs, Joe	Leave	Annual Leave: June 9, 2021 (1 working day)	Pending	Delete

Showing 1 to 3 of 3 entries Previous Next

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.

Demo Company ? 👤

- 📄 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✔ Approval

Approval

Pending Requests

Show entries Search:

Requested On	Requester	Type	Details	Status	
2021-05-25	Bloggs, Joe	Leave	Annual Leave: May 20, 2021 to May 26, 2021 (4.5 working days)	Pending	Delete
2021-05-25	Bloggs, Joe	Info Update	Joe Bloggs: Street Number, Same As Physical, Suburb Or District, Street Or Farm Name	Pending	Delete

Showing 1 to 2 of 2 entries Previous Next

Finalised Requests (in the last month) [\(show all\)](#)

Show entries Search:

Requested On	Requester	Type	Details	Status	Updated On	
2021-05-25	Bloggs, Joe	Leave	Annual Leave: June 9, 2021 (1 working day)	Approved	2021-05-26	Delete

Showing 1 to 1 of 1 entries Previous Next

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

Demo Company ? 👤

- 🏠 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✓ Approval

Leave Request - Bloggs, Joe

Request Information

Days Requested
Annual Leave: May 20, 2021 to May 26, 2021 (4.5 working days)

Approvers on this Request

Ronell Hill

Jamie Bezuidenhout

State
Pending

Leave Balances

Type	Days	Last Updated
Sick	4.01	2021-05-26
Annual	1.13	2021-06-09
Family Responsibility	3.0	2021-05-26

These balances take into account days included in pending leave requests.

Projected Leave Balances

The following table shows how this request will affect this employee's leave balances.

Date	Annual
2021-05-20	5.31
2021-05-21	4.35
2021-05-24	3.47
2021-05-25	2.51
2021-05-26	1.55

Actions

Supporting documents

[Upload new files](#)

No files attached

Respond

Approve

Deny

No Decision

Comment:

[Save](#)

Recent Activity

25 May 2021 16:04	Joe Bloggs	Request Submitted
-------------------	------------	-------------------

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

Demo Company ? 👤

- 📄 Payslips
- 📅 Requests
- 📄 Tax Certificates
- 📅 Calendar
- ✔ Approval

Info Update Request - Bloggs, Joe

Changes

	From	To
Street Number	---	1
Same As Physical	---	true
Suburb Or District	---	Suburbia
Street Or Farm Name	---	Victory Road

Approvers on this Request

Ronel Hill

Jamie Bezuidenhout

State

Pending

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**.