



Sumetica Payroll

Approval Workflow Guide

April 2020

Table of Contents

Introduction 3

Setting-up for Payroll Approval..... 4

Running the Payroll 6

What Does the Client See?..... 7

Introduction

This document provides details on the Payroll Approval Workflow and associated automation within Sumetica.

This guide accompanies some of the automation features that are a key to Sumetica. Sumetica Payroll is very different to most products on the market, being biased towards automation of tasks. For static payrolls and the back-end processes within variable payrolls (RTI, Pensions, Costing Journals) etc. Sumetica frees significant payroll operator time; the price to pay for this is that more attention is required during the setup phase.

In Sumetica and within this guide we describe payrolls as being Static or Variable, a Static payroll is one such as Director only, which runs at a fixed payment (usually around the PAYE/National Insurance Threshold monthly). A Variable payroll is one where there are more often than not changes such as hours to be entered. You may have a number of payrolls that fall between these categories, in that the payroll is typically Static but sometimes changes occur (Sickness, Bonuses etc) – these can be easily accommodated, you will need to decide how close to each of Static or Variable the payroll is. A good guide here is to ask yourself “is there a regular (each period) submission of data to be entered?” if the answer is no, then you can treat the payroll as being Static, if the answer is yes, then it’s a Variable payroll.

Static Payrolls are the easiest – once configured, they will just run on the relevant days and all of the activities (Payroll Calculation, Payslip Production, Reporting, RTI, Pension Member/Contribution output, Costing Journals) will be taken care of; the payroll will even move itself into the next period and wait for the process to start-over. You are in control of the offset dates from Pay Date that the activities occur.

Variable Payrolls have one difference, you are expecting to do “something”. Exactly what that “something” is depends on the type of payroll, service you provide etc. Typically, you will be entering hours or other changes into the payroll. Depending on the timeliness of your clients (or Employers as we describe them) you may be able to automate the process or you may be running and checking the payroll yourself, confirming then that the back-end processes can be run.

We’ll assume that you have payrolls setup in Sumetica and are ready to progress having more automation in your organisation.

So with the above in-mind, you should now have your username and password ready and navigate to <https://payroll.sumetica.net> and get started.

Setting-up for Payroll Approval

Before Payroll Approval can be used, it needs to be configured. There are some choices to make as to how you want clients to approve, and what you will show them.

Three choices exist where approval is required:

Client can receive a secure link; the link will contain a message from your organisation and then allow the client to press “Approve” or “Decline”.

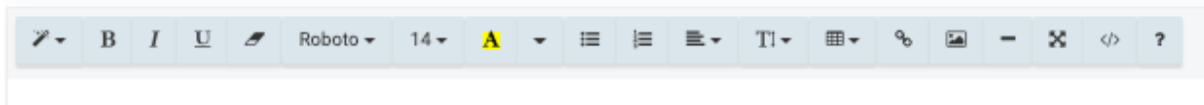
Client can receive the same link, with the message and the total Net pay showing, they can then press “Approve” or “Decline”.

Client can receive the same link, with the message and the Net pay showing, but is required to re-enter the Net pay amount before being able to “Approve” or “Decline”.

These choices are made through the **Settings** options for **Payroll Approval Message**.

Payroll Approval Page (Instructions for the user)

- Show total Net Pay
- Require entry of Net Pay to proceed



To use only the first option (no Net pay shown, no confirmation required), leave the boxes unticked.

To implement the second option, showing the Net pay being approved, tick the “**Show total Net Pay**” box only.

To implement the requirement to show and re-enter the Net Pay, tick the “**Require entry of Net Pay to proceed box**” as well as the “**Show total Net Pay**” box.

Once decided and configured, you need to configure the Payroll Approval Email (see the Settings Guide for more details). The approval email must contain the [approval_link] merge field.

Approval forms and the associated secure links are created when the email is produced. If you create an email in Sumetica following sending one, you will invalidate the first link!

Configuring a Payroll for Approval

Payrolls that are static, will not need approval, remember these are payrolls that are (relatively) unchanged month-to-month. Where the payroll is running in this “automatic” matter (the “Auto-run Payroll” box is ticked on Payroll Details) you won’t want approval, but rather for Sumetica to process and distribute the reports, run RTI etc.

Where there are more changes on a regular basis, you’ll typically have the situation where the client send details of variable pay, you’ll run the payroll and then want the client to approve. In this case, we’ll need to tick the box “Requires approval” on the Payroll Details page.

You can still take advantage of automation, with the “Auto-run post-payroll” option in Payroll Details allowing for the “after approval” activities to be done automatically (RTI, Pensions, Accounts and final reports for example).

The image shows a configuration form for a payroll. The fields are as follows:

- Pay Period*: 2019/01
- Frequency*: Monthly
- Auto-run Payroll:
- Auto-run Post-payroll:
- Auto-apply DPS:
- Pay day: Last working day
- Payslip day: Pay Date less one day (-1)
- Bacs day: Pay Date less three working days (-3)
- Reporting day: Pay Date less five working days (-5)
- Auto-run day: Pay Date less six working days (-6)
- Submission day: Pay Date less seven working days (-7)
- First period starts*: 01/04/2019
- Adjustments: Prior working day
- Territory: United Kingdom
- Region: England
- Requires approval: (highlighted with a red box)
- Confirmed/Approved:

Below the 'Requires approval' checkbox is a link: [Override to approved](#)

So we are most interested in the field highlighted in the above.

Running the Payroll

Where a payroll needs approval, it's the same process as entering details and running any other payroll.

What will be different is the email that is sent the first time the payroll runs. In this example, we'll assume that approval is required and the "**Auto-run post-payroll**" option is also set.

You will run the payroll and check your results. When happy, you'll send the email to the client including the agreed reporting items, by navigating to the Payroll->Email page and clicking the "**send email**" link.

This will generate a Sumetica email – Sumetica will know that the payroll requires approval and will use the Payroll Approval Email Template (see Settings Guide for more information); which you will have setup to request approval including the [**approval_link**] merge field.

So, the client will see the email, your instructions and any attached reporting items.

You are then awaiting their approval. The payroll will "stall" doing no further activity until the approval is granted.

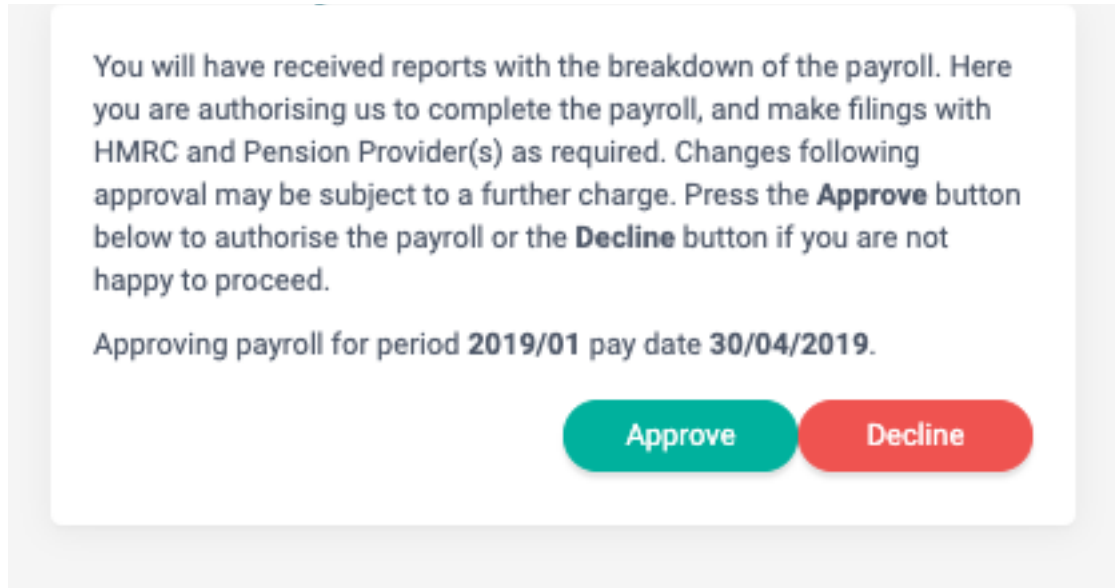
Of course, there may be issues, the client may not be able to access the internet or for some other reason gives verbal approval. In this case you can click on the "**Override to approved**" link on Payroll Details, which will approve the payroll.

Once approval is received (from the client or via override) then the payroll will continue to do the post-payroll calculation activity, filing RTI etc.

What Does the Client See?

After receiving the email, the client will be able to click on a link. They will then see one of three variations of the Approval page depending on the options you selected earlier.

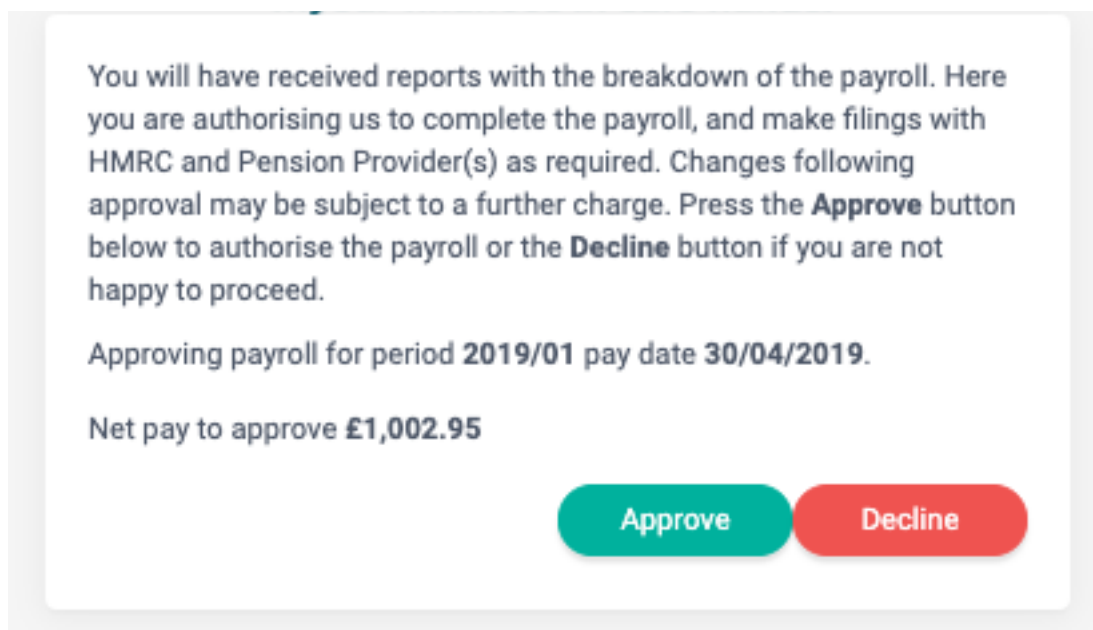
Option One – Approval (no net pay)



In this option, the logo you specify under settings (see Settings Guide for more details) and the message you have configured are shown.

The client simply presses Approve or Decline.

Option Two – Shows Net Pay



In this option, the logo you specify under settings (see Settings Guide for more details) and the message you have configured are shown along with the Net Pay figure for the payroll.

The client simply presses Approve or Decline.

Option Three – Requires Entry of Net Pay

You will have received reports with the breakdown of the payroll. Here you are authorising us to complete the payroll, and make filings with HMRC and Pension Provider(s) as required. Changes following approval may be subject to a further charge. Press the **Approve** button below to authorise the payroll or the **Decline** button if you are not happy to proceed.

Approving payroll for period **2019/01** pay date **30/04/2019**.

Net pay to approve **£1,002.95**

Re-enter total net pay (without the £ sign)

Approve **Decline**

In this option, the logo you specify under settings (see Settings Guide for more details) and the message you have configured are shown along with the Net Pay figure for the payroll. The client is required to re-enter the value before they can approve or decline the payroll. If they press the button(s) without entering the net pay figure a warning will pop-up.

The client enters the net pay and then presses Approve or Decline (which will take effect assuming they have keyed in the correct figure).

What Happens Next?

Upon Approval, that's dependent on what other options have been set. Typically, we see the "Auto-run post-payroll" option set, so the RTI, Pensions and Accounts links along with a final confirmation email (the Completed Payroll Email) are sent automatically.

When a payroll is declined, then you need to be alerted to this. Sumetica can generate a number of alerts including on the Dashboard.