



# iTrent Interactive Payslip User Guide

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## Document Control

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## Document Classification

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# 1. Introduction

## 1.1 Interactive Payslip Summary

### 1.1.1 What is an 'Interactive Payslip'

The payslip has remained static in its functionality for many years and is often the cause of a query as people do not understand what the values represent or how they have been calculated. It should also be remembered that a payslip is a legal document and should be easy to understand. In a similar concept to how a bank statement has evolved (from a paper statement to electronic), the payslip can follow the same approach and become an electronic document.

An 'Interactive Payslip' is a new method of presenting an electronic payslip in 'Employee Self Service (ESS)', which allows the interrogation of values and how they have been calculated. The contents of the information are configurable and can be tailored to individual items such as how an hourly rate or tax deduction is calculated. This new method will change the payslip to enable self-solution and reduce queries into the payroll department and allow them to focus on key payroll issues.

### 1.1.2 What are the benefits of an 'Interactive Payslip'?

The type of scenarios an 'Interactive Payslip' will help with include:

- **Tax code change** – When a tax code is changed a notification is received from HMRC. An 'Interactive Payslip' will allow a check of whether payroll have processed the tax code and the date and pay period it has been actioned from. It will also show a list of historical tax codes should they be needed
- **National Insurance (NI) category change** – Some NI categories are age related. This will allow people to check that the NI category has changed where appropriate
- **Timesheet check** – A frequent query received by a payroll team is asking what days a claimed payment is for. An Interactive payslip displays the days or shifts which have been paid, allowing these to be cross checked to any claims made
- **How 'X' has been calculated** – Provides an explanation of how items such as salary or overtime have been calculated. This will be especially useful in scenarios such as transfers and mid-period changes
- **Statutory deductions** – Explain how statutory deductions such as tax and national insurance have been calculated
- **Check if pay award / salary review applied** – Gives the ability to check if a pay award has been implemented and from when
- **Check contribution rate of pension** – Some companies allow the choice of pension percentage contribution. An interactive payslip allows people to check their percentage contribution and when applicable if changes have been processed

In summary, by embracing technology to revolutionise the payslip, people will for the first time engage with their payslip as they have a tool to explain the values and with the reduction of queries into the payroll team it will free up time to enable them to deliver the superior service they aspire to.

## 1.2 Audience

This guide is aimed at:

- System administrators responsible for the configuration of the 'Interactive Payslip'
- Users of the 'Interactive Payslip' to assist with understanding how their pay has been derived.

Note: A knowledge of 'User Calculations' will be required to configure the 'Interactive Payslip'. If assistance is required, please raise with you MHR Customer Relationship Manager.

## 1.3 Scope

This guide covers the following:

- Post-installation actions, including activating the 'Interactive Payslip' licence and configuring navigation security.
- Set-up and usage of the 'Interactive Payslip'

## 2. Activation

Before you can use the 'Interactive Payslip' feature, you will need to obtain the licence and key from MHR. Once you have obtained a licence, you will need to activate it in both your iTrent Test and Live environments by entering the key provided into the 'Licence Manager' page, below:

Licence manager

MENU

Licence key	Type(s)	Expiry date	Days remaining	Install date
***** @-Q6{g	Interactive Payslip	31/12/2025	2015	17/06/2020

Licence activation

Licence key


The key looks like a random string of letters, numbers and other characters.

## 2.1 Adding 'Interactive Payslip' pages to navigation security

When a new release is installed, only the system administrator will have access to all of the new navigation options. The navigation security for each 'Function Access' will need to be reviewed and then recompiled to enable access to the new functionality. Users who have multiple 'Function Accesses' will also need to have their 'Access Assignments' recompiled.

Batch processes are available to perform the recompilations.

### Organisation > Security > Function access(Select a function access) > Navigation security

This page displays a checklist of all the iTrent modules contained in your organisation, with their sub-nodes (click  to expand the view) and the current status of access permissions.

Items that are ticked are available to users that use the selected Function access (following recompilation).





















































Items that are not ticked are not available to users that use the selected 'Function Access' (following recompilation).

Un-ticking any of the boxes will disable access to the individual node or you can disable the whole module by un-ticking the top-level box. Unchecked items will not be available for users with the selected 'Function Access'.

When you click the 'Compile' button (at the bottom of the display) on the "Navigation Security" page the compilation will run as a background process.

When the compilation process completes your users can log in and access the new functionality.

The pages required to configure and use an 'Interactive Payslip' are below:

System administration	UK Legislation	Employee Self Service
<ul style="list-style-type: none"><li>-  System administration</li><li>-  User calculations<ul style="list-style-type: none"><li>-  User Calculations<ul style="list-style-type: none"><li>+  Calculation debug log</li><li>+  User calculation accumulator list</li></ul></li><li>-  Interactive payslip maintenance<ul style="list-style-type: none"><li>-  Interactive payslip maintenance<ul style="list-style-type: none"><li> Interactive payslip text</li><li> New - Interactive payslip text</li></ul></li></ul></li><li> User calculations</li><li> Export user calculations</li><li> New - Import user calculations</li><li> Copy user calculation</li><li> New - User calculations</li></ul></li></ul>	<ul style="list-style-type: none"><li>-  UK legislation<ul style="list-style-type: none"><li> Tax code sources (non-electric)</li><li>+  Court order rules</li><li>+  UK tax offices</li><li>+  Issuing authority list</li><li> SMP/OSPP exclusion reasons (non-electric)</li><li>+  SMP rules</li><li>+  OSPP rules</li><li> SSP exclusion reasons (non-electric)</li><li>+  SSP rules</li><li> SAP exclusion reasons (non-electric)</li><li>+  SAP rules</li><li> ASPP exclusion reasons (non-electric)</li><li>+  ASPP rules</li><li> ShPP exclusion reasons (non-electric)</li></ul></li><li>-  UK payslip maintenance<ul style="list-style-type: none"><li>-  UK payslip maintenance<ul style="list-style-type: none"><li> Interactive payslip maintenance<ul style="list-style-type: none"><li>-  Interactive payslip maintenance<ul style="list-style-type: none"><li> Interactive payslip text (UK legislation)</li><li> New - Interactive payslip text (UK legislation)</li></ul></li></ul></li></ul></li></ul></li></ul>	<ul style="list-style-type: none"><li>-  Self Service (Home)</li><li>+  Personal details</li><li>+  Employment</li><li>-  Payroll<ul style="list-style-type: none"><li>+  Bank details</li><li>+  Time &amp; Expenses claims</li><li>+  Time &amp; Expenses claims history</li><li>+  P60</li><li>+  P45</li><li>+  Personalised journeys</li><li> Latest payslip</li><li> Latest payslip (pdf)</li><li>-  Payslip history</li><li>-  Payslip history<ul style="list-style-type: none"><li> Online payslip</li><li>-  Payslip history (pdf)</li><li>-  Payslip history (pdf)</li><li> Payslip (pdf)</li><li> Multiple payslip print (pdf)</li></ul></li></ul></li></ul>



## 3. Interactive Payslip Text

### 3.1 Summary

The “Interactive Payslip Text” page is used to configure the information presented on a payslip viewed in ‘Employee Self Service’. The page allows the configuration of different languages, the content of an optional header and the content of the interactive text modal. Each instance is date effective, allowing alternative information to be presented if rules change.

The configuration is available against:

- ‘Element’ and ‘Pension’ user calculations  
Navigation of:  
**System administration > User calculations > Interactive payslip maintenance > Interactive payslip text**
- UK legislative items of tax and National Insurance  
Navigation of:  
**UK legislation > UK payslip maintenance > Interactive payslip maintenance > Interactive payslip text**

With the exception of the ‘General’ tab, all tabs are designers contain a HTML editor which gives various controls relating to text formatting, the use of bullet points, hyperlinks and templates. The tabs presented will differ dependent upon the user calculation or legislation item selected.

Notes:

Once ‘Interactive Payslip Text’ has been configured a ‘Gross to Net’ calculation must be run to generate the interactive information on a payslip.

Guernsey and Jersey statutory deductions are controlled via user calculations of SOJ Tax, SOJ Social Security Employee, Guernsey SS Employee and Guernsey Tax. The text presented when interacting with these items is configured against these calculations.

If a person has more than one pension scheme attached to the same position, when interacting with the employer deduction only one scheme will be displayed. This will be resolved in a later release.

### 3.2 General tab (all items)

The screenshot shows a web interface titled "Interactive payslip text" with a "MENU" dropdown and icons for refresh and print. Below the title is a tabbed interface with five tabs: "General", "Header", "Details", "Retrospection", and "Absence". The "General" tab is selected and highlighted. Inside the "General" tab, there are three settings: "Effective from" with a date input field showing "01/04/2020" and a calendar icon; "Language" with a dropdown menu showing "English"; and "Active" with a checked checkbox.

The 'General' tab is used to specify the date from which the iteration will be effective and the language.

Should the contents of a tab require changing, a new iteration can be created with the appropriate effective date. New iterations support changes to the rules of a user calculation and allow continuous improvement of the contents based upon feedback. When creating a new iteration, all tabs are initially blank, but where the contents of a tab will be identical to the previous iteration the text can be cut and paste.

The 'Active' check box allows an iteration to be deactivated but not deleted, allowing the temporary disabling of the interaction with an element or the creation of future iteration.

The iteration used when interacting with a payslip will be the active iteration applicable as at the payment date of the payslip. The language used will be the chosen language by the person in "Employee Self Service Preferences".

### 3.3 Header tab (all items)

Interactive payslip text

MENU

GeneralHeaderDetailsRetrospectionAbsence

Header

Template

EditFormatFormatsB I 11ptA A

- Bullet point
- Square bullet
- Numbered list
- Section header
- Link icon

A A

**Salary calculation**

Salary is calculated as a FTE (ful time equivalent) of your annual salary.

**Mid period change**

Where there is a change during the period which will impact salary, the part month is calculated based upon the number of calendar days in the period.  
Full policy details can be found by clicking [here](#).

Powered by Tiny50 words

The 'Header' tab is optional and if populated the text will appear at the top of the 'Interactive Payslip' modal. The format and style of the text can be configured, and hyperlinks inserted.

### 3.4 Details tab (user calculations only)

Interactive payslip text ▼ MENU

General Header **Details** Retrospection Absence

Details

Template

Edit ▼ Format ▼

Available fields ▼

↶ ↷ Formats ▼ **B** *I* 11pt ▼ [List of alignment and list icons] [Link icon]

A ▼ A ▼

**<<Position>>**

Salary for the period <<transaction:from\_date>> to <<transaction:to\_date>> is £<<transaction:actual\_value>>. This is based upon an annual salary of £<<Rate>> and contractual hours of <<Cont\_Hours>> hours per week.

p Powered by Tiny 29 words

The 'Details' tab is used to configure the contents of the 'Interactive Payslip' modal for permanent and temporary elements. As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a list of the variables used by the associated 'User Calculation' and values accessible directly from the transaction created by the 'Gross to Net' calculation. Selecting an item from the list will insert it into the design and enclose within << >> to allow it to be easily identifiable.

When the 'Interactive Payslip' modal is opened from 'Employee Self Service' the inserted field will be replaced with the content of the selected variable as at the completion of the calculation.

As an example, when viewed in 'Employee Self Service' the above may show as:

**Office Administrator**  
Salary for the period 19/06/2020 to 30/06/2020 is £1,133.33. This is based upon an annual salary of £34000 and contractual hours of 35.00 hours per week.

### 3.5 Retrospection tab (all items)

Interactive payslip text ▼ MENU

General Header Details **Retrospection** Absence

Retrospection

Template

Edit ▼ Format ▼

Available fields ▼

↶ ↷ Formats ▼ **B** *I* 11pt ▼ [List of alignment and bullet point icons] [Link icon]

A ▼ A ▼

As a result of a backdated change to your <<Position>> salary, pay for <<transaction:originally\_paid>> has changed by <<transaction:input\_cash>>.

Powered by Tiny 18 words

The 'Retrospection' tab is used to configure the contents of the 'Interactive Payslip' modal for retrospection scenarios. As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a list of the variables used by the associated 'User Calculation' and a fixed list of variables which related directly to the transaction created by the 'Gross to Net' calculation. Section 3.7 gives a detailed explanation of the fixed list of variables and their contents in different scenarios. Selecting an item from the list will insert it into the design and enclose within << >> to allow it to be easily identifiable.

When the 'Interactive Payslip' modal is opened from 'Employee Self Service' the inserted field will be replaced with the content of the selected variable as at the completion of the calculation.

As an example, when viewed in 'Employee Self Service' the above may show as:

As a result of a backdated change to your salary, pay for 31/05/2020 has changed by 270.83.

### 3.6 Absence tab (user calculations only)

Interactive payslip text ▼ MENU

General Header Details Retrospection **Absence**

Absence

Template

Edit ▼ Format ▼

Available fields ▼

← → Formats ▼ **B** *I* 11pt ▼ [Text alignment icons] [List icons] [Link icon]

A ▼ A ▼ [Table icon]

Due to your <<absence\_type>> your pay is as follows:


<<abs_date_title>>	<<abs_offset_title>>	<<abs_payment_title>>
<<abs_date>>	<<abs_offset>>	<<abs_payment>>

For more information on the absence policy, please click here.

Powered by Tiny

20 words

The 'Absence' tab is used to configure the contents of the 'Interactive Payslip' modal for absence scenarios. As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a list of the variables used by the associated 'User Calculation' and a fixed list of variables which related directly to the transaction created by the 'Gross to Net' calculation. Section 3.9 gives a detailed explanation of the fixed list of variables and their contents in different scenarios. The 'Absence' tab also contains an additional 'insert template' option as indicated by the  icon. This is used to insert a grid containing the absence values related to the payslip. An example of the grid can be seen on the next page. Selecting an item from the list will insert it into the design and enclose within << >> to allow it to be easily identifiable.

When the 'Interactive Payslip' modal is opened from 'Employee Self Service' the inserted field will be replaced with the content of the selected variable as at the completion of the calculation.

As an example, when viewed in 'Employee Self Service' the above may show as:

Due to your Sickness your pay is as follows:

Date	Offset	Payment
09/06/2020	-78.89	78.89
10/06/2020	-78.89	78.89
11/06/2020	-78.89	78.89
12/06/2020	-78.89	78.89
13/06/2020	-78.89	78.89
14/06/2020	-78.88	78.88
15/06/2020	-78.89	78.89
16/06/2020	-78.89	39.45
17/06/2020	-78.89	39.44
18/06/2020	-78.89	39.45
19/06/2020	-78.89	39.44
20/06/2020	-78.89	39.45
21/06/2020	-78.89	39.44
22/06/2020	-78.89	39.44
23/06/2020	-78.89	0.00
24/06/2020	-78.88	0.00
25/06/2020	-78.89	0.00
26/06/2020	-78.89	0.00
27/06/2020	-78.89	0.00
28/06/2020	-78.89	0.00
29/06/2020	-78.89	0.00

For more information on the absence policy, please [click here](#).

Note: For absence values to be present on a payslip the 'Show absence offset' option must be ticked on the 'Payslip Type' design of the 'Online Payslip' (Legislation Details) used by the payroll.

Payslip type designer PD Online Payslip MENU

**Actions**

- £ Payslip - PD Online Payslip
- Box - Box 4 (This Period/YTD Values)
- Taxable Payments This Period
- Non Taxable Pay This Period
- Tax Paid YTD
- NI Paid YTD
- Taxable Pay YTD
- Nilable Pay YTD

**Payslip type details**

**Payslip type**  
PD Online Payslip

**Stationery type** Specific **Legislation type** UK Legislation

**Report code**  
Online Payslip with rates

**Show employee bank details** ☒ **Show absence offset** ☒ **Show each mileage claim separately** ☐

### 3.7 Cumulative / Non-Cumulative / Single rate tabs (UK tax only)

**Interactive payslip text** ▾ MENU

General Header **Cumulative** Non-Cumulative Single rate Retrospection

Cumulative

Template

Edit ▾ Format ▾

Available fields ▾

↶ ↷ Formats ▾ **B** *I* 11pt ▾ [List Icons] [Link Icon]

A ▾ **A** ▾ [Table Icon]

### Calculating your taxable pay

You have been issued a cumulative tax code of <<Tax\_code>>. This instructs that tax is calculated on earnings from <<Tax\_year\_start\_date>> up to and including this period.

Your taxable pay this period is £<<Taxable\_pay\_this\_period>>, giving taxable pay to date of £<<Taxable\_pay\_year\_to\_date\_(including\_this\_period\_taxable)>>.


### Calculating your tax allowance

Your tax free allowance so far this year of £<<Tax\_free\_pay\_year\_to\_date>> is deducted from your taxable pay to date. You will pay tax on  
£<<Taxable\_pay\_year\_to\_date\_(including\_this\_period\_taxable)>> -  
£<<Tax\_free\_pay\_year\_to\_date>> = £<<Actual\_taxable\_pay\_year\_to\_date>>.

Powered by Tiny

144 words

The 'Cumulative', 'Non-Cumulative' and 'Single rate' tabs are used to configure the contents of the 'Interactive Payslip' modal for UK tax. The tab used will be applicable to the type of tax code issued to the person (examples of single rate tax codes are BR and D0). As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a list of the variables used by the tax calculation. Section 3.11 gives a detailed explanation of the fixed list of variables and their contents in different scenarios. These tabs all contain an additional 'insert template' option as indicated by the  icon. This is used to insert a grid containing the tax bands, applicable pay and tax deduction. Selecting an item from the list will insert it into the design and enclose within << >> to allow it to be easily identifiable.

When the 'Interactive Payslip' modal is opened from 'Employee Self Service' the inserted field will be replaced with the content of the selected variable as at the completion of the calculation.



As an example, when viewed in 'Employee Self Service' the tax grid may show as:

Tax bands/rates	Applicable pay	Tax due
20%	9,375.00	1,875.00
40%	28,125.00	11,250.00
45%	2,215.00	996.75

A record effective 01/01/2021 describing how tax has been calculated is shipped with iTrent. This can be used or alternatively be a template for a custom version with a later effective.

### 3.8 Standard / Director tabs (UK national insurance only)

Interactive payslip text ▼ MENU

General Header **Standard** Director Retrospection Override

Standard

Template

**Calculating your niable pay**

You are on a national insurance category of <<NI\_category>>. This instructs that national insurance is calculated on your niable pay this period of £<<NIable\_pay\_this\_period>>.


**Calculating your national insurance due**

Your niable pay of £<<NIable\_pay\_this\_period>> is split between the applicable national insurance rates and national insurance (NI) is calculated as:

<<ni_rate>>	<<applicable_pay>>	<<ni_due>>
<<rate>>	<<pay>>	<<ni>>

Powered by Tiny 120 words

The 'Standard' and 'Director' tabs are used to configure the contents of the 'Interactive Payslip' modal for UK national insurance. The tab used will be applicable to the type of person (Non-Director or Director). As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a list of the variables used by the national insurance calculation. Section 3.12 gives a detailed explanation of the fixed list of variables and their contents in different scenarios. These tabs all contain an additional 'insert template' option as indicated by the  icon. This is used to insert a grid containing the national insurance band/rate, applicable pay and national insurance due. Selecting an item from the list will insert it into the design and enclose within << >> to allow it to be easily identifiable.

When the 'Interactive Payslip' modal is opened from 'Employee Self Service' the inserted field will be replaced with the content of the selected variable as at the completion of the calculation.

As an example, when viewed in 'Employee Self Service' the national insurance grid may show as:

NI rate	Applicable pay	NI due
Up to LEL @ 0%	520.00	0.00
LEL to ST @ 0%	212.00	0.00
ST to PT @ 0%	60.00	0.00
PT to UEL @ 12%	2,041.33	244.96

A record effective 01/01/2021 describing how national insurance has been calculated is shipped with iTrent. This can be used or alternatively be a template for a custom version with a later effective.

### 3.9 Override tab (UK tax & national insurance only)

Interactive payslip text ▼ MENU

General Header Standard Director Retrospection **Override**

Override

Template

Your tax value for this period has been overridden to be £<<override\_value>>. Please contact your Payroll Department for further details.

Powered by Tiny 21 words

The 'Override' tab is used to configure the contents of the 'Interactive Payslip' modal for UK tax and national insurance when the value has been overridden. As per previous tabs the format and style of the text can be configured, and hyperlinks inserted.

The 'Available Fields' dropdown contains a single variable of the override value which can be used within the explanation.

### 3.10 User Calculations 'Available Fields'

In addition to the list of the variables used by the associated 'User Calculation', the 'Available Fields' dropdown also contains a list of generic variables. The matrix below details when each is populated and describes the values each contains.

Available field	Used in		
	Details tab	Retrospection tab	Absence tab
<<absence_scheme_name>>	Not populated	Not populated	Name of absence scheme the item is linked to
<<absence_type>>	Not populated	Not populated	Absence type of the absence scheme
<<transaction:actual_value>>	Cash value as seen on the payslip	Total retrospection value as seen on the payslip	Cash value as seen on the payslip of the element the absence relates to
<<transaction:date_earned>>	'Date earned' field from temporary element details page if a temporary element. Not populated if a permanent element	'Date earned' field from temporary element details page if a temporary element. Not populated if a permanent element	Not populated
<<transaction:from_date>>	Date within the pay period the item is effective from. This is normally the period start date but if a mid-period starter or pro-rata this will display the appropriate date	Date within the pay period the item is effective from. This is normally the period start date but if a mid-period starter or pro-rata this will display the appropriate date	Start date of pay period.
<<transaction:input_cash>>	Not populated	The retrospection value for each period which is being adjusted	Not populated
<<transaction:input_time>>	Not populated	The number of hours input against a temporary element input against a previous period for payment as retrospection in the current period	Not populated
<<transaction:originally_paid>>	Not populated	The payment date which the retrospection value is adjusting	Not populated
<<transaction:to_date>>	Date within the pay period the item is effective to. This is normally the period end date but if a mid-period leaver or pro-rata this will display the appropriate date	Date within the pay period the item is effective to. This is normally the period end date but if a mid-period leaver or pro-rata this will display the appropriate date	End date of pay period
<<transaction:unprorated_value>>	The value prior to any change due to pro-rata	Not populated	The full unprorated period value of the element impacted by absence

### 3.11 UK Tax 'Available Fields'

The matrix below details the items available when configuring UK tax, when each item is populated and describes the values each contains.

Available field	Used in				
	Cumulative tab	Non-cumulative tab	Single rate tab	Retrospection tab	Override tab
<<Actual_taxable_pay_this_period>>	Not available	The periodic value against which tax is calculated. This is post reduction of free pay allowance	Non-cumulative tax codes only. See non-cumulative tab for details of content	Not available	Not available
<<Actual_taxable_pay_year_to_date>>	The year to date value against which tax is calculated. This is post reduction of year to date free pay allowance	Not available	Cumulative tax codes only. See cumulative tab for details of content	Not available	Not available
<<Single_rate_tax_percentage>>	Not available	Not available	The tax percentage to used derived from the tax code	Not available	Not available
<<Tax_code>>	The tax code used to calculate tax in the period	The tax code used to calculate tax in the period	The tax code used to calculate tax in the period	Not available	Not available
<<Tax_due_this_period>>	The calculated tax deduction in the period	The calculated tax deduction in the period	The calculated tax deduction in the period	Not available	Not available
<<Tax_due_year_to_date>>	The total amount of tax to deduct in the tax year	Not available	Cumulative only. See cumulative tab for details of content	Not available	Not available
<<Tax_free_pay_this_period>>	Not available	The tax free pay in the period as defined by the tax code	Non-cumulative tax codes only. See non-cumulative tab for details of content	Not available	Not available
<<Tax_free_pay_year_to_date>>	The tax free pay so far this tax year as defined by the tax code	Not available	Cumulative only. See cumulative tab for details of content	Not available	Not available
<<Tax_paid_previously_year_to_date>>	The amount of tax paid to date this	Not available	Cumulative only. See cumulative	Not available	Not available

	tax year prior to the payslip in view		tab for details of content		
<<Tax_period>>	The tax period applicable to the payslip in view	The tax period applicable to the payslip in view	The tax period applicable to the payslip in view	Not available	Not available
<<Tax_period_start_date>>	The start date of the tax period applicable to the payslip in view	The start date of the tax period applicable to the payslip in view	The start date of the tax period applicable to the payslip in view	Not available	Not available
<<Tax_year_start_date>>	The start date of the tax year applicable to the payslip in view	The start date of the tax year applicable to the payslip in view	The start date of the tax year applicable to the payslip in view	Not available	Not available
<<Taxable_pay_this_period>>	The value of taxable pay this period prior to reduction of free pay allowance	The value of taxable pay this period prior to reduction of free pay allowance	The value of taxable pay this period prior to reduction of free pay allowance	Not available	Not available
<<Taxable_pay_year_to_date_(including_this_period_taxable)>>	The value of taxable pay this tax year prior to reduction of free pay allowance	Not available	Cumulative only. See cumulative tab for details of content	Not available	Not available
<<Grid>>	The grid displaying the applicable tax bands and deductions	The grid displaying the applicable tax bands and deductions	The grid displaying the applicable tax bands and deductions	Not available	Not available
<<transaction:input_cash>>	Not available	Not available	Not available	The retrospection value for each period which is being adjusted	Not available
<<transaction:originally_paid>>	Not available	Not available	Not available	The payment date which the retrospection value is adjusting	Not available
<<override_value>>	Not available	Not available	Not available	Not available	The override value of the payslip in view

### 3.12 UK National Insurance 'Available Fields'

The matrix below details the items available when configuring UK national insurance, when each item is populated and describes the values each contains.

Available field	Used in			
	Standard tab	Director tab	Retrospection tab	Override tab
<<LEL>>	The LEL value applicable to the pay frequency of the payslip in view	The LEL value applicable to the pay frequency and national insurance method of the payslip in view	Not available	Not available
<<NI_category>>	The national insurance category used to calculate national insurance in the period	The national insurance category used to calculate national insurance in the period	Not available	Not available
<<NI_due_this_period>>	The calculated national insurance contribution in the period	Not available	Not available	Not available
<<NI_due_year_to_date>>	Not available	The total amount of national insurance to contribute in the tax year	Not available	Not available
<<NI_method>>	Not available	The method used to calculate the directors national insurance contribution	Not available	Not available
<<NI_paid_previously_year_to_date>>	Not available	The amount of national insurance contributed to date this tax year prior to the payslip in view	Not available	Not available
<<Nlable_pay_this_period>>	The value of Nlable pay this period prior	Not available	Not available	Not available
<<Nlable_pay_year_to_date_(including_this_period_Nlable)>>	Not available	The value of Nlable pay this tax year prior to reduction of free pay allowance	Not available	Not available
<<PT>>	The PT value applicable to the pay frequency of the payslip in view	The PT value applicable to the pay frequency and national insurance method of the payslip in view	Not available	Not available
<<Pay_period_start_date>>	The start date of the pay period	The start date of the pay period	Not available	Not available




	applicable to the payslip in view	applicable to the payslip in view		
<<ST>>	The ST value applicable to the pay frequency of the payslip in view	The ST value applicable to the pay frequency and national insurance method of the payslip in view	Not available	Not available
<<Tax_period>>	The tax period applicable to the payslip in view	The tax period applicable to the payslip in view	Not available	Not available
<<Tax_year_start_date>>	The start date of the tax year applicable to the payslip in view	The start date of the tax year applicable to the payslip in view	Not available	Not available
<<UEL>>	The UEL value applicable to the pay frequency of the payslip in view	The UEL value applicable to the pay frequency and national insurance method of the payslip in view	Not available	Not available
<<Grid>>	The grid displaying the applicable national insurance bands, applicable pay and contribution	The grid displaying the applicable national insurance bands, applicable pay and contribution	Not available	Not available
<<transaction:input_cash>>	Not available	Not available	The retrospection value for each period which is being adjusted	Not available
<<transaction:originally_paid>>	Not available	Not available	The payment date which the retrospection value is adjusting	Not available
<<override_value>>	Not available	Not available	Not available	The override value of the payslip in view



## 4. Employee Self Service payslip

Opening an online payslip in ESS will display a payslip as per the below.

Payslip details

Payslip: 30/06/2020  [Download](#)

Employee Name	Kirsty Green	Tax Period	3
Reference No.	1005	Tax Code	950L Cumulative
		NI Number	RA276509C
		NI Category	A

Payments				Deductions			This Period	
Payment	U/T	Rate	Cash	Deduction	Rate	Cash	Description	Value
SP Overtime @1.0	3.5	17.967	62.88	Tax		594.20	Taxable Payments This Period	2,748.35
SP Salary			2,768.33	NI - A		244.70	Employer's NI This Period - A	289.69
				SP Pension		84.94	Employer's Pension Paid TP	113.25

Benefits	
Description	Cash
PD Company Phone (Taxable)	2.08


Year-to-date	
Description	Value
Tax Paid YTD	714.20
NI Paid YTD - A	244.70
Taxable Pay YTD	5,948.35
Nieble Pay YTD	2,831.21
Pension YTD	84.94

Total Payments	2,831.21	Total Deductions	923.84	NET PAY	1,907.37
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Payroll cut off is the 24th of each month.  
Any claims submitted after this date will be paid the following month.

Elements, pension schemes and legislation items which have had their user calculation configured as per section 3 will be displayed as blue text. Clicking the element will open a modal with the applicable text, including the merged values.

Payslip details

Payslip: 30/06/2020  [Download](#)

Employee Name	Kirsty Green	Tax Period	3
Reference No.	1005	Tax Code	950L Cumulative
		NI Number	RA276509C
		NI Category	A

Payments				Deductions			This Period	
Payment	U/T	Rate	Cash	Deduction	Rate	Cash	Description	Value
SP Overtime @1.0	3.5	17.967	62.88	Tax		594.20	Taxable Payments This Period	2,748.35
SP Salary			2,768.33	NI - A		244.70	Employer's NI This Period - A	289.69
				SP Pension		84.94	Employer's Pension Paid TP	113.25

Benefits	
Description	Cash
PD Company Phone (Taxable)	2.08

Year-to-date	
Description	Value
Tax Paid YTD	714.20
NI Paid YTD - A	244.70
Taxable Pay YTD	5,948.35
Nieble Pay YTD	2,831.21
Pension YTD	84.94

Total Payments	2,831.21	Total Deductions	923.84	NET PAY	1,907.37
----------------	----------	------------------	--------	---------	----------

Payroll cut off is the 24th of each month.  
Any claims submitted after this date will be paid the following month.

SP Overtime @1.0

Additional hours are paid in arrears. Where authorised after the payroll cut off date the hours will be paid in the next period.

Office Administrator - 2.00 hour(s) for 02/06/2020 at a rate of £17.96703 totalling £35.93.

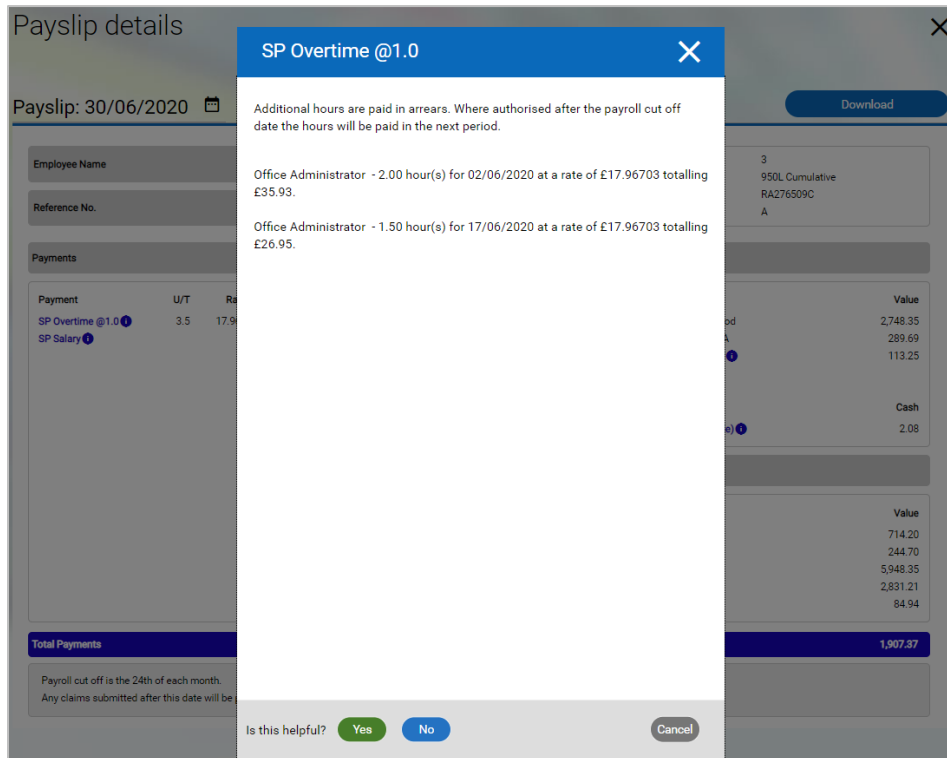
Office Administrator - 1.50 hour(s) for 17/06/2020 at a rate of £17.96703 totalling £26.95.

Is this helpful? [Yes](#) [No](#) [Cancel](#)



## 5. Payslip feedback

To allow the monitoring of the benefit which the 'Interactive Payslip' delivers and the potential time savings within the payroll team due to the reduction in queries, a feedback monitoring feature is available.



At the bottom of a modal is a 'Is this helpful' section. This allows via a single click a person to indicate if the text within the modal has been of help and answered any questions they may have had. A person can give feedback once per user calculation / legislation item per period. Once feedback has been given the buttons are removed.

If the instance of the design used to populate the modal is updated the feedback buttons will return. This allows interactive text to be updated and the monitoring of subsequent feedback for improvements in positive responses.

## 5.1 Payslip feedback report

A report called 'Payslip Feedback' is available to allow the monitoring of feedback. This is available as a Payroll report within Management Information.

Payslip Feedback [\(as of 01/03/2021\)](#) ▼ MENU 🔄 🖨️

Payroll or Organisation start point

Payroll ▼

Payroll

All Payrolls ▼

Start date

📅

End date

📅

Calculation

All Calculations ▼

Include cover pages

☒

Output type

PDF File ▼

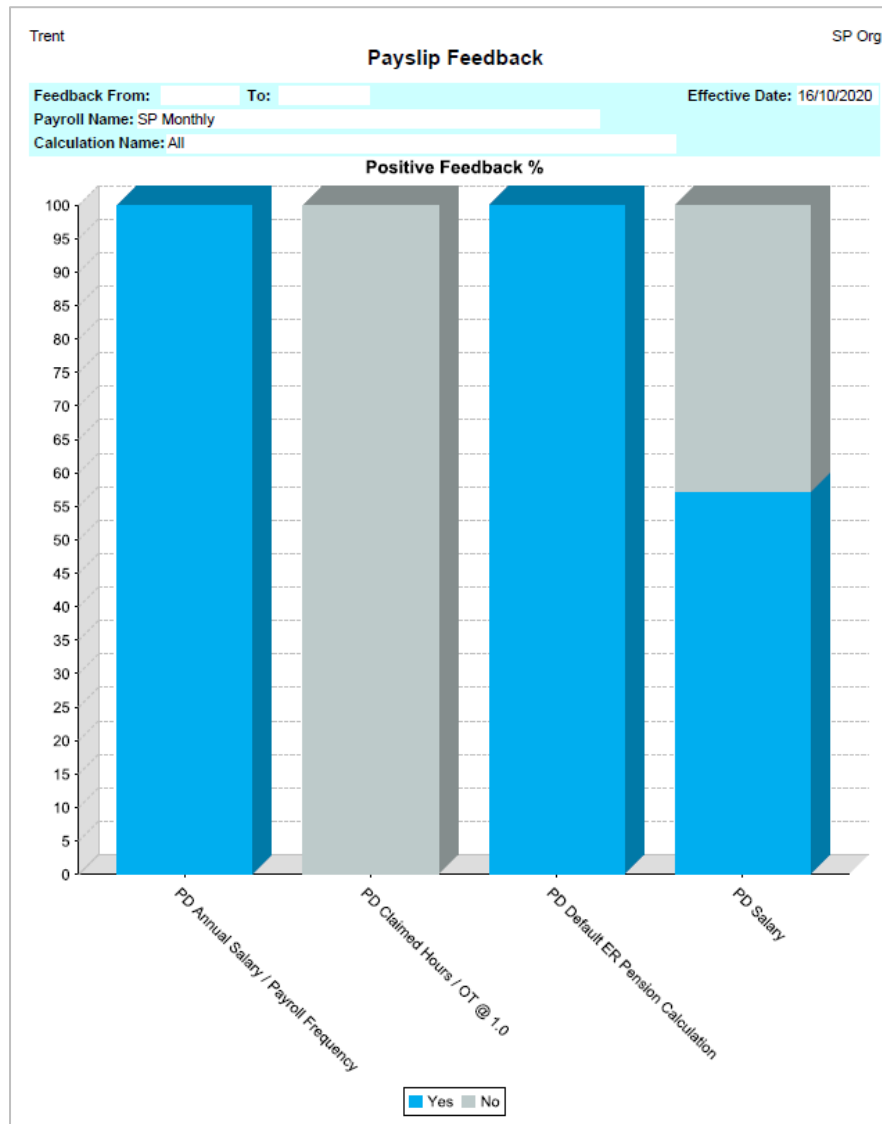
Report run comments

The table below describes the fields on this form:

Field	Comments
Payroll or Organisation start point	Select either 'Payroll' or 'Organisation start point' from the drop-down list
Payroll	If 'Payroll' has been selected, select the payroll to report on from the drop-down list
Organisation start point	If 'Organisation start point' has been selected, search and select the start point for the report
Organisation view	Select from: Show all data by unit Show all data as top unit Only include data in top unit
Start date	If required select the start date of when feedback was given which is to be included in the report
End date	If required select the last date of when feedback was given which is to be included in the report
Calculation	Select the calculation / legislation item to report on
Include cover pages	Tick this checkbox to include header and footer cover pages on PDF outputs
Output type	Select the required output type from the drop-down list
Report run comments	Enter any comments as required to identify the report

The output of the report shows as per the below. The first page is a summary giving a visual indication of yes/no feedback and subsequent pages give a detailed of the data breakdown of the data for each user calculation the person who has responded, the payslip date, the date/time of the response and the response.

Example of summary



## Example of data

Trent

Payslip Feedback

Feedback From:

To:

Effective Date: 16/10/2020

Payroll Name: SP Monthly

Calculation Name: All

Payroll Reference	Surname	Forename	Payroll Name	Payment Date	Feedback Date/Time	Feedback Response
PD Salary						
1002	Abbott	Clare	SP Monthly	30/6/2020	5/10/2020 07:40	Yes
1000	Rogers	Elaine	SP Monthly	30/4/2020	30/9/2020 09:46	Yes
1000	Rogers	Elaine	SP Monthly	31/5/2020	30/9/2020 09:46	No
1000	Rogers	Elaine	SP Monthly	30/6/2020	9/10/2020 10:47	Yes
1001	Tyler	Ronald	SP Monthly	30/6/2020	16/10/2020 11:06	No
1001	Tyler	Ronald	SP Monthly	30/6/2020	25/9/2020 14:31	No
1001	Tyler	Ronald	SP Monthly	31/5/2020	25/9/2020 14:36	Yes
PD Salary		Positive Feedback: 4		57%		
		Negative Feedback: 3		43%		



## Readers' Comments

MHR's policy is to continue to improve its documentation. Items for inclusion or requests for amendments to this document should be sent to:

The Documentation Manager

MHR  
Ruddington Hall  
Ruddington  
Nottinghamshire  
NG11 6LL

or email: [documentation@mhr.co.uk](mailto:documentation@mhr.co.uk)