astutepayroll

Employee Guide

v 8.0 Feb 2019

Contents

Getting Started

Astute Payroll is web based software that helps manage the administration of on-hire and contracting businesses.

As an employee, you'll submit timesheets for the hours or days you work. You may be a direct employee of an organisation or a subcontractor working under another entity.

Once your employee access is set up by your organisation, you'll receive an email that contains your user ID and the URL you'll need to set up your password and log into your Astute portal.

If you haven't received this email, contact your administrator and they'll be able to resend it to you.

Setting Your Password

When you click the URL in the email, you'll be prompted to set up your password and security questions.

The password you set will need to meet the Password Requirements listed at the top of the screen.

Once you've entered and confirmed the password, select two security questions from the drop down fields and enter the answers to each, then click Set Password.

On future logins, you'll be able to directly enter your username and password to gain access to your portal.

If you forget your username or password, click Forgot Password then enter your username or email address. You will be sent an email containing a link you can follow to reset your password.

Setting Up Two Factor Authentication

You will also need to set up two factor authentication (2FA) as an extra layer of security on top of your password.

If you click 'Set up 2FA Now', you'll be taken through the configuration process for 2FA. Your administrator can provide you with a guide on how to set this up.

If you click 'I'll set 2FA up later', you will be directed to your portal Dashboard. Without 2FA configured, you will still be able to submit timesheets and expenses, but will not be able to access your Profile tab and personal information.

Employee Portal Setup

Once you're logged into the portal you'll have access to a number of functions.

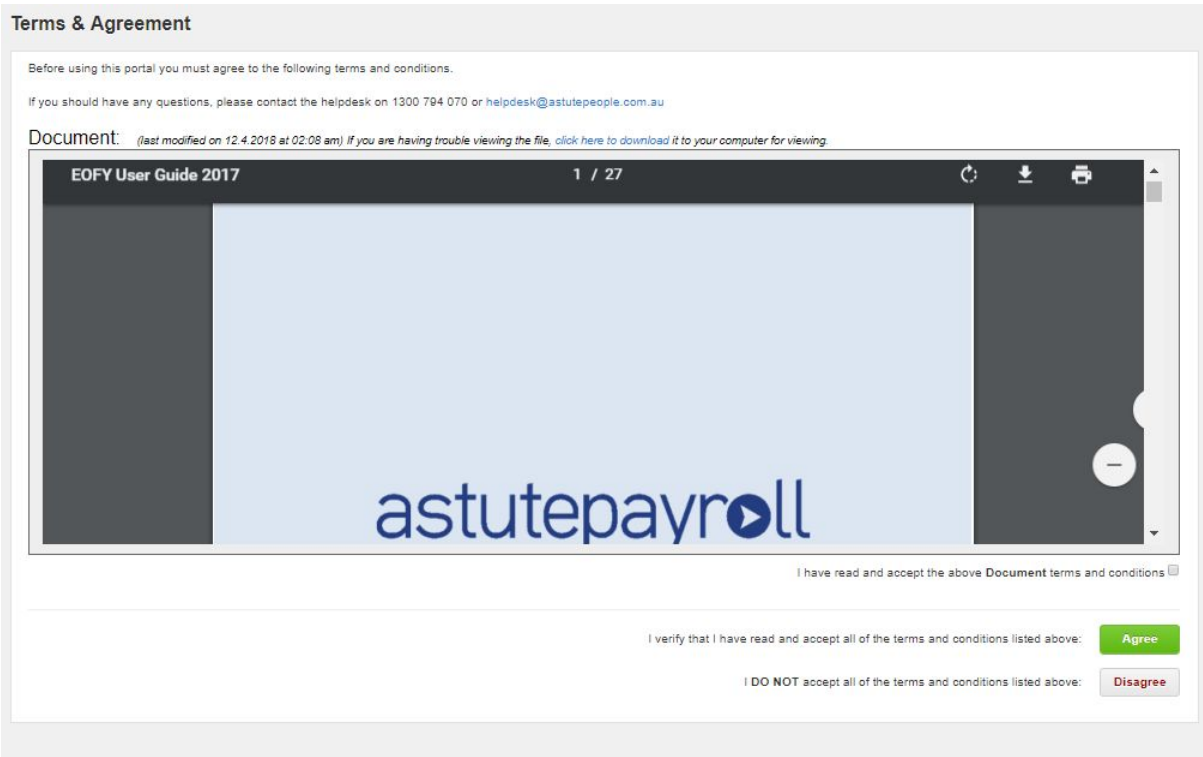
Compliance

Your employer may have set up documents (eg employment agreements) you will need to review and accept before you can proceed into the portal.

Compliance documents can show on your first login or at a later time if updated policies, procedures or company notices are rolled out.

Once you've read a document, tick the checkbox to accept the terms of the document then click Agree. You can download a document by clicking 'click here to download' above the document display.

Completed compliance documents can be viewed from the 'Your Profile' section of your portal Dashboard.



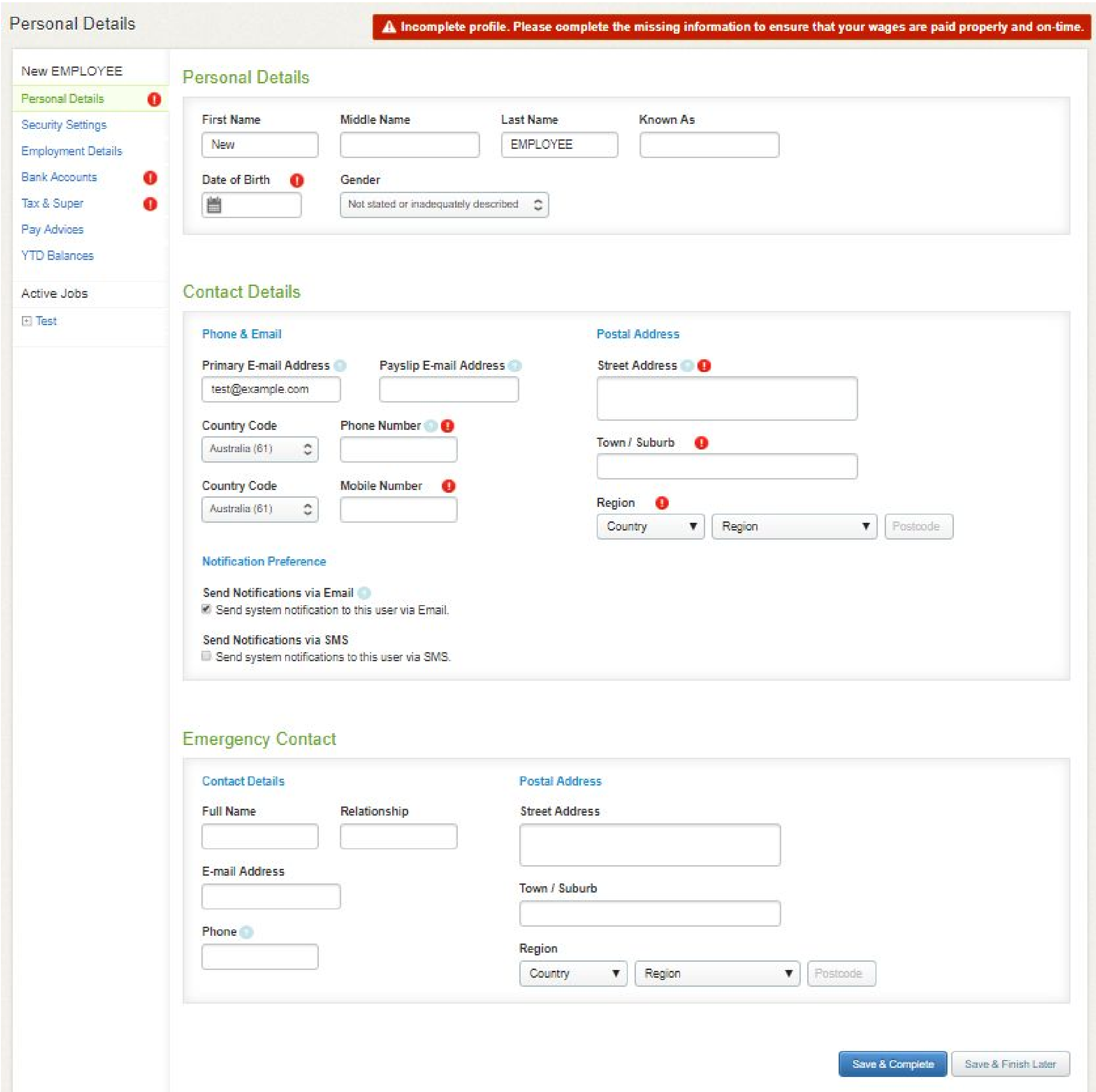
If you click 'Disagree' you will be redirected to the main login screen and will not be able to access your portal until the terms are accepted. Please speak with your payroll administrator if you have any questions about a compliance document.

Profile

The Profile tab records your personal and employment details. You will only be able to access the Profile tab if you have configured 2FA in your portal.

Once you've logged in and set up 2FA, go to the Profile tab and confirm your personal information is entered so that you can be processed through payroll.

If there is mandatory data missing, you will see an 'Incomplete profile' banner. Each required field will be marked with a red exclamation point.



The Profile tab is split into several sections:

Personal Details	● Personal Details (Name, Date of Birth and Gender) ● Contact Details (Phone, Email and Postal Address) ● Emergency Contact Details

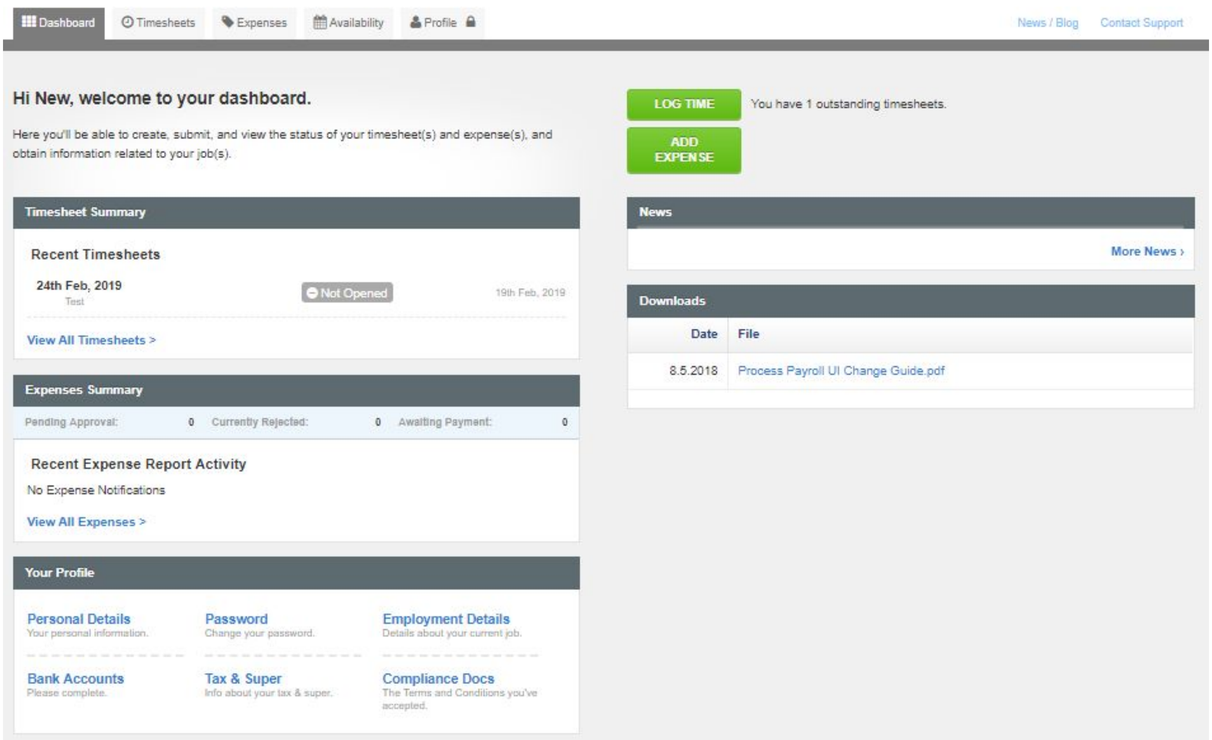
Security Settings	• Manage your password and security question settings • Manage your 2FA configuration
Employment Details	• Pay Type (PAYG Employee or subcontractor) • Employment Eligibility status
Bank Accounts	• The bank account details that your wages will be paid into • Additional bank accounts can be listed to split payments across more than one account
Tax & Super	• Tax Information (Tax File Number and lodgement history) • Superannuation Information
Pay Advices	• A list of payslips available for download for any processed pay periods from within the Astute portal. • Payslips will not appear in your Astute portal if your employer uses an external payroll program.
YTD Balances	• Balances that have been recorded in Astute for the current financial year
Active Jobs	• A list of currently active Jobs (the Start Date has passed and the Finish Date is in the future). • Each job will be listed separately and can be expanded to view additional information about Job Details, Timesheets and Expenses.
Inactive Jobs	• A list of inactive Jobs (jobs that have finished or are yet to start) • Each job will be listed separately and can be expanded to view additional information about Job Details, Timesheets and Expenses.

Dashboard

The Dashboard gives you an overview of your portal. Each module on the Dashboard links to functions to view them in greater detail. Depending on how your organisation set up, some menus mentioned may not be enabled.

Timesheet Summary	• A summary of recent Timesheet activity. • Click 'View All Timesheets' to go to the Timesheets tab.
Expenses Summary	• A summary or recent Expenses activity. • Click 'View All Expenses' to go to the Expenses tab.
Your Profile	• Links to common Profile functions and accepted compliance documents
News	• Displays notices and news items for your organisation.

Downloads	• A document library compiled by your organisation for quick reference.



Timesheets

Timesheets can be accessed in your portal from:

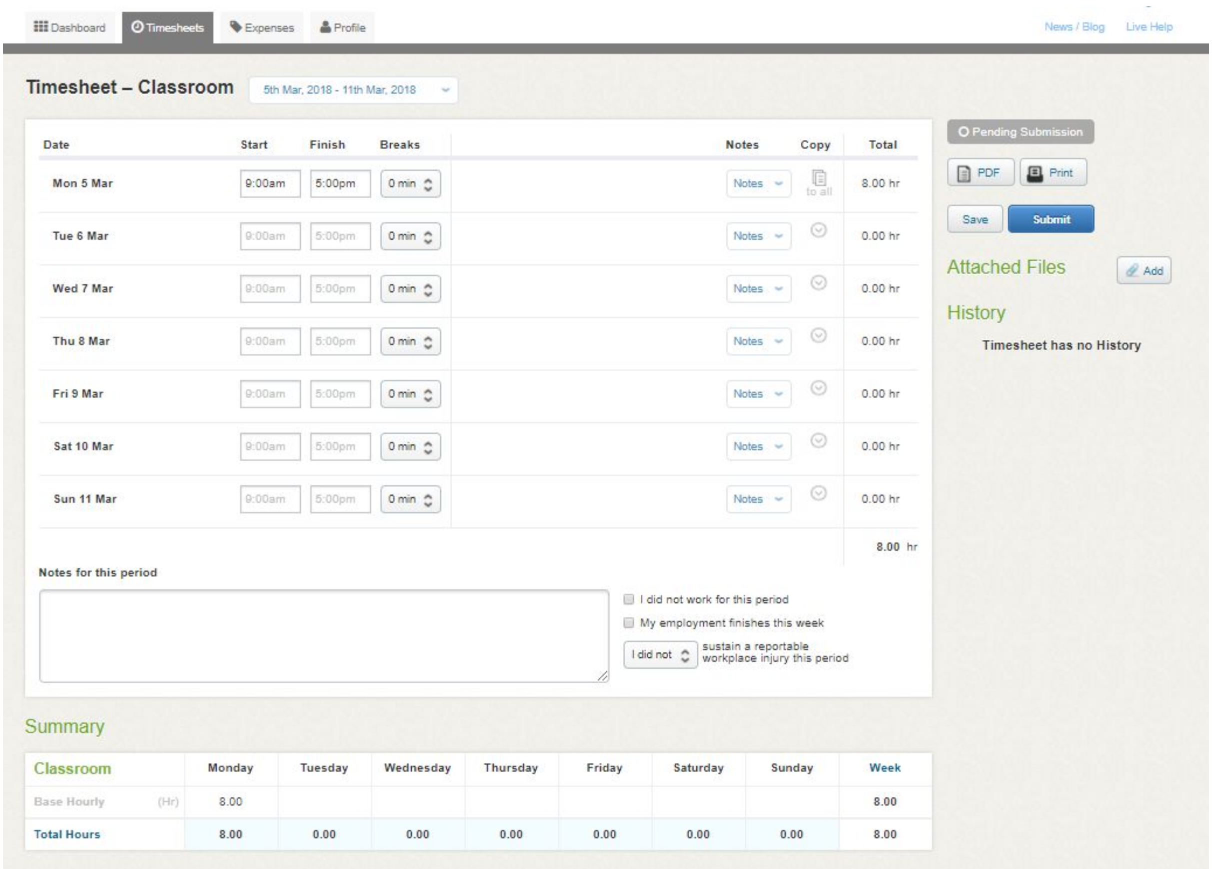
- the Dashboard, clicking on Log Time
- the Dashboard, clicking on the relevant timesheet period in the Timesheet Summary section
- the Timesheets tab, which gives you access to the current period, as well as future and historic timesheets.

The frequency and pay period of your timesheets will depend on how the portal is managed by your organisation. This will also determine the cut-off for when you need to complete and submit each timesheet.

Entering Hours on a Timesheet

If you only have one active Job, any hours entered in the timesheet will automatically be allocated to that Job.

To complete your timesheet, enter the Start and Finish times plus breaks taken in the relevant fields, then click Save (to return to the timesheet at a later point) or Submit (to send the timesheet through to your Approver for review).



Entering Hours for Multiple Jobs

If you have multiple active Jobs for a timesheet period, you can choose whether to view the timesheet for an individual Job or to combine all your active Jobs in a single view.

Click 'View all jobs on one timesheet' from the Jobs in Timesheet section to consolidate the information entered for all jobs onto a single timesheet.

To return to an individual view, click the View Timesheet option for that Job from the same section.

Projects and Pay Item Blocks

If the Projects function is enabled or there are multiple Pay Items assigned to your Job, you'll also have the option to add a New block for a Project or Pay Item.

Please contact your administrator for more information on the Projects or Pay Items available to you,

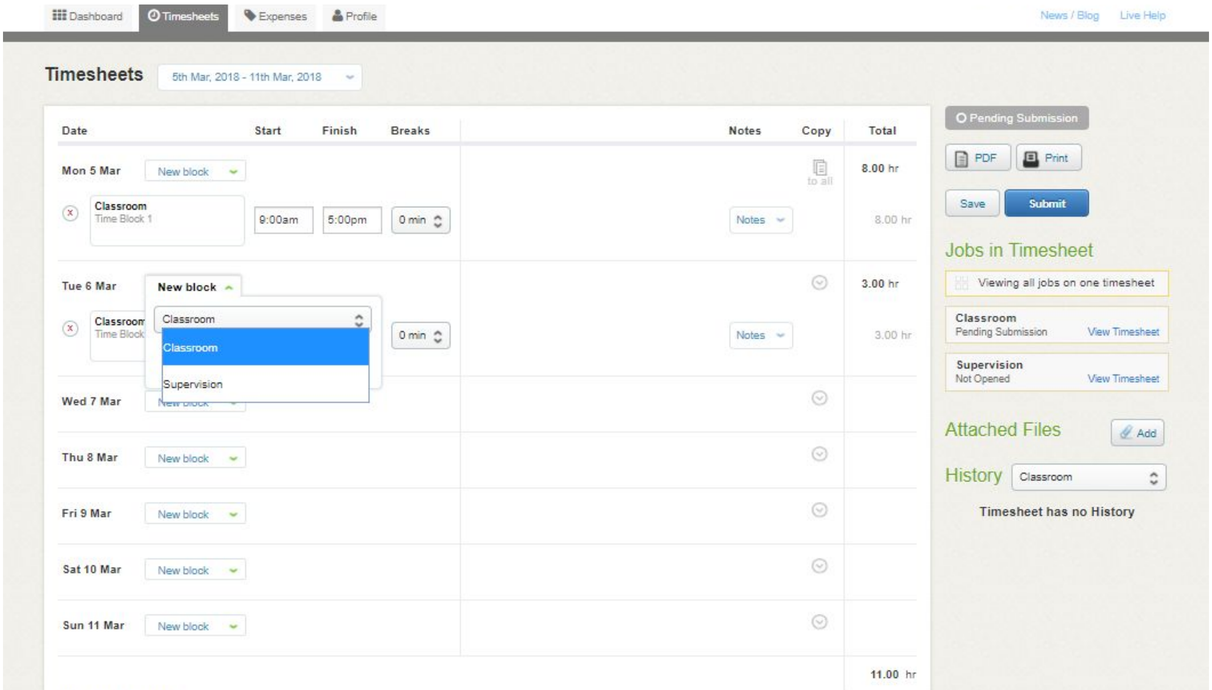
Split Shifts

If split shifts are enabled on your timesheet, you'll be able to enter more than one time block each day. For example, you may work 9am-12pm for one Job, then 12-5pm against a second job.

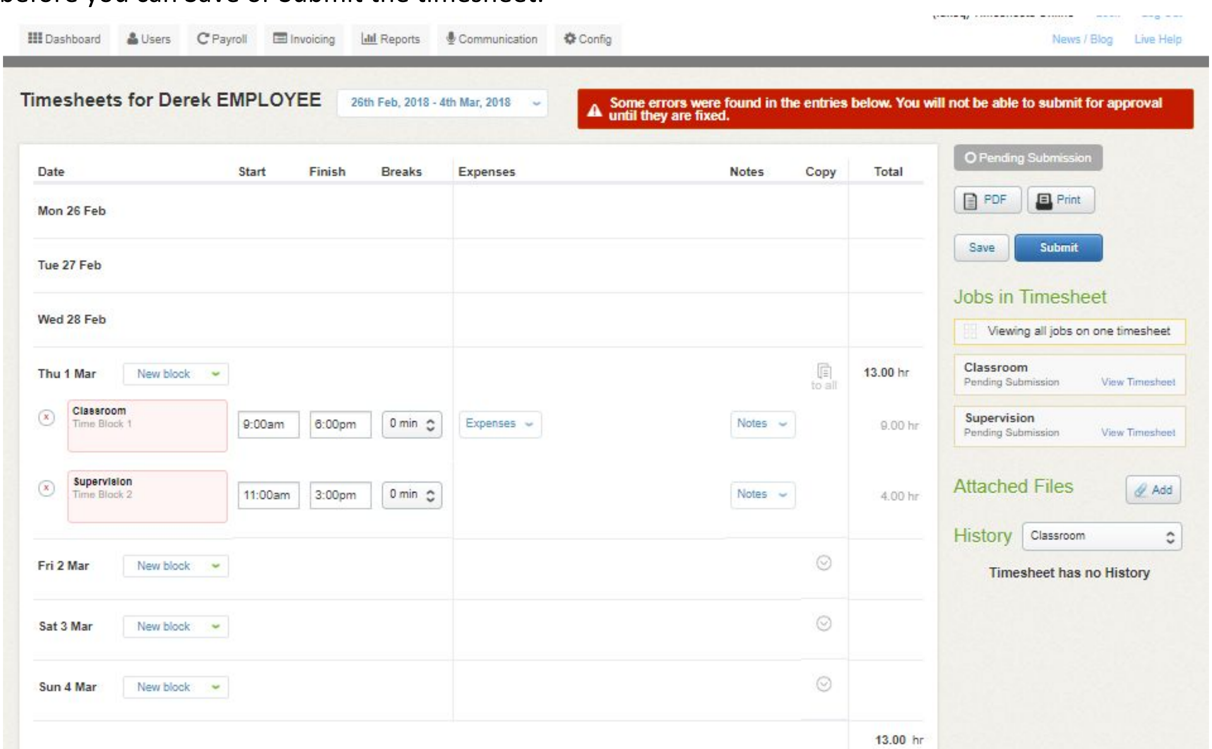
To enter a time block:

1. Select 'New block' on the relevant day in the timesheet.
2. Select the Job from the drop down list > Add.
3. Enter the Start, Finish and Breaks times as required.

This process can be repeated to enter time blocks for the rest of the timesheet.



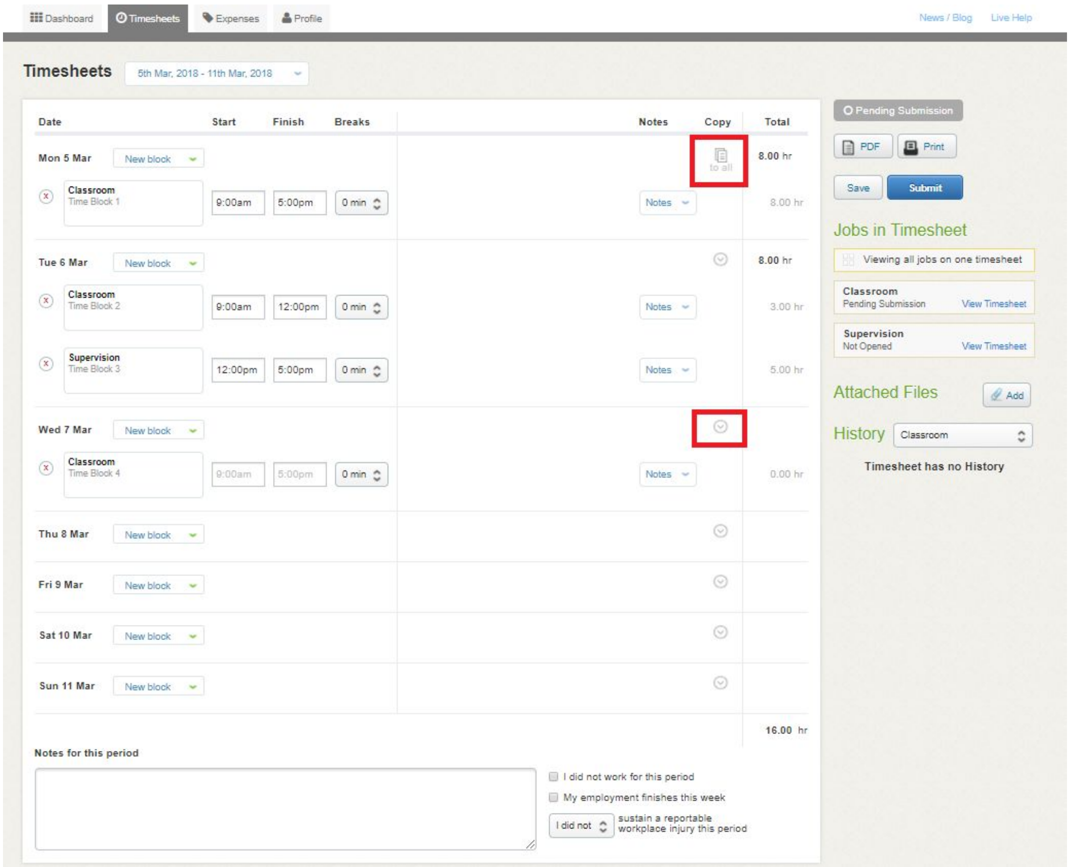
If you enter overlapping time blocks for Jobs, this will be flagged in an error message at the top of your timesheet with the relevant blocks highlighted in red. You will need to adjust the time blocks before you can Save or Submit the timesheet.



Timesheet Shortcuts

If you work the same hours each day, enter the hours on the first relevant day and select the 'to all' icon in the Copy column. This will apply the same hours to all business days after that day on the timesheet.

Selecting the down arrow in the Copy column will apply the details from the timesheet line directly above to the current line (eg clicking the down arrow on Wednesday will copy the data from the Tuesday timesheet line).



Adding Other Information to a Timesheet

Your timesheet may also allow you to record other items, such as allowances, expenses or leave requests, depending on how your job and employer are configured.

You can use the Notes drop down to record other information that needs to be communicated to your Approver or recruiter. They will be able to view these ones you have submitted your timesheet.

Attachments (eg manual timesheets, kilometre forms) can be added by clicking 'Add' in the Attached files section on the right hand side of the timesheet. These attachments will need to be uploaded in .pdf, .jpeg, .png or .gif format.

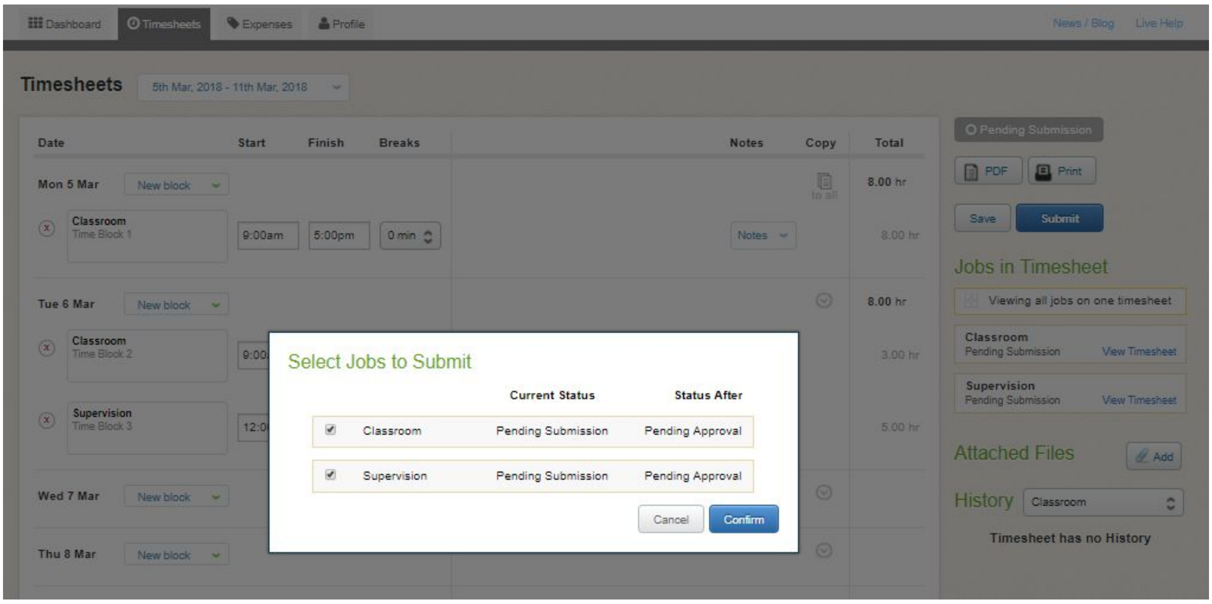
Submitting Timesheets

Once a timesheet has been filled out, clicking Submit will start the approval process.

If you've entered hours on a timesheet for one job, your Approver will receive a notification advising them to review and approve.

If you have entered hours for multiple jobs on your timesheet, clicking Submit will prompt a popup window with a list of the jobs included in the timesheet. Select which jobs you would like to submit and click Confirm.

If any jobs are not selected, the timesheet data you have entered will be saved and can be submitted later. The status for these timesheets will show as ‘Pending Submission’.



Before submitting your timesheet, ensure that you check the following:

- If your employment is finishing during the timesheet period, tick the ‘My employment finishes this week’ checkbox to notify your recruiter or employer.
- If you have sustained a reportable workplace injury for the period, change the ‘I did not’ drop down field to ‘I did’. This should be done in addition to any OHS processes of your employer.

You can also select ‘I did not work for this period’ to submit a timesheet with zero hours.

Timesheet Status

The status of a timesheet shows where it is up to in the approval process.

Not Opened	• The timesheet has not been accessed and no information has been entered. • Fill in and submit the timesheet by the deadline.
Pending Submission	• Timesheet has been accessed but is not yet submitted. • Fill in and submit the timesheet by the deadline.
Pending Approval	• Timesheet has been submitted and is awaiting approval. • Can follow up with your Approver.
Rejected	• Timesheet has been queried by the Approver. • Review the reason for the rejection, then update the timesheet and resubmit.

Did Not Work (Unprocessed)	• The 'Did Not Work' option has been selected in the timesheet to indicate that the employee has worked 0 hours for the timesheet period.
Did Not Work (Processed)	• The Did Not Work (Unprocessed) timesheet has been processed for payroll.
Ready for Interpretation	• Timesheet has been approved and is awaiting payroll processing.
Payment Authorised	• Timesheet has been processed through payroll and is ready to be paid.

Resetting a Timesheet

Once you've submitted a timesheet, you won't be able to edit it. If the timesheet is 'Pending Approval' and needs editing, your Approver will need to reject it first. This will send the timesheet back to your portal so that you can edit and resubmit.

After a timesheet is approved, it can only be reset by a Portal Administrator so you will need to contact them directly if this is required.

Automated Timesheet Reminders

Automated timesheet reminders will be sent to your registered email address at set times throughout the week. The timing of these reminders will depend on the pay cycle linked to your Job (eg Monday to Sunday, Tuesday to Monday).

First Submission Reminder	• Sent one day before the end day of the pay cycle, to remind you to complete and submit timesheets for the week by the morning processing deadline. • If this day falls on a weekend day, the notification will send on the last business day before the end of the pay cycle.
Final Submission Reminder	• Sent on the end day of the pay cycle, to remind you to submit timesheets by the payroll deadline or their pay may be delayed. • If this day falls on a weekend day, the notification will send on the first business day following the end of the pay cycle.
Approval Reminder	• Sent at 12:30pm on the first day after the pay period has ended, to remind your Primary Approver of any outstanding approvals.
Approval Notification	• Sent at 12:30pm on the first day after the pay period has ended, to inform you if their submitted timesheet is not yet approved.
Timesheet Approved/Rejected	• Sent to an employee as actioned by the Approver.

Missing Timesheets

When a Job finished and all timesheets have been completed through payroll, you will have access to archived timesheets from Profile > Job Profiles > Inactive Jobs.

If you can't see a timesheet for the current week and you are still working at a Job, contact your recruiter or an administrator for your organisation as the finish date may need to be extended.

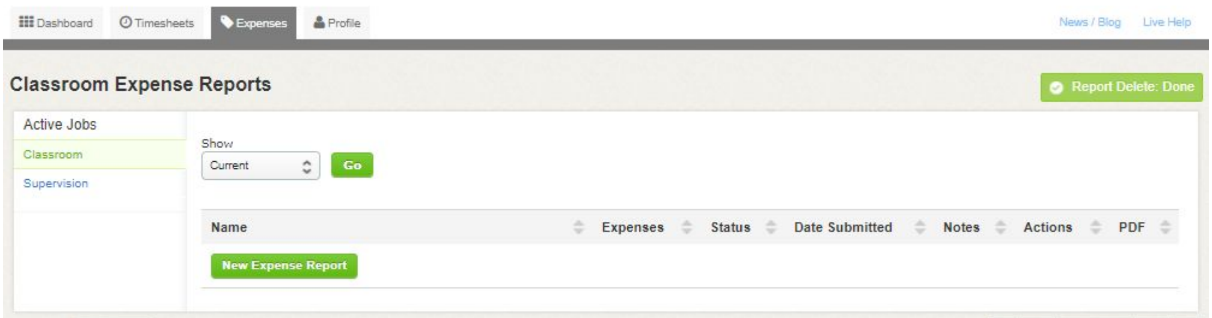
Expenses

The Expenses tab is an optional feature which allows employees to submit expense claims to be included in their payroll.

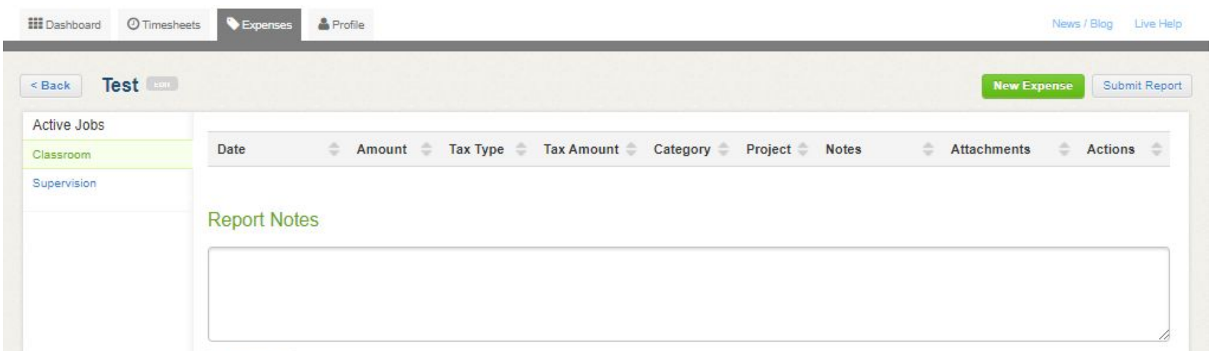
The feature needs to be enabled for a Job before it will appear in your portal. If the Expenses tab is not appearing and it should be, contact your employer.

An expense claim is created from your Dashboard by clicking 'Add Expense' or by navigating manually to the Expenses tab.

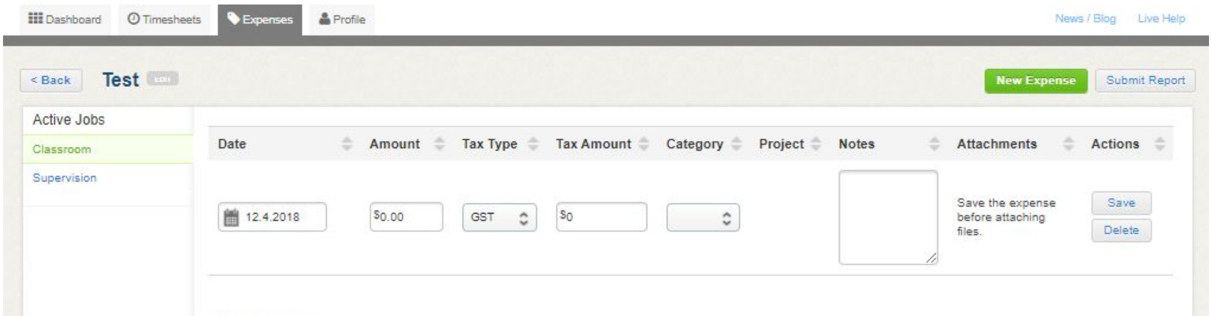
1. In the Expenses tab, click New Expense Report.



2. Enter a name for the expense report > Save.
3. Select the expense report name from the list to open it.
4. Click New Expense.



5. Enter the details of the expense > Save.



Once the expense report is created and saved, you can:

- Attach a copy of your invoice or receipt.
- Include other expenses by selecting 'New Expense', entering the details into the new expense line and clicking 'Save'.
- Click '<Back' if your Expense Report is incomplete or you don't yet wish to submit for approval.
- Add any notes relating to the expense claim.
- Click 'Submit Report' to submit your Expense claim for approval.

When you submit the report, a notification will be sent to your Approver so that they can review the expense.

Once approved, the expense will be ready for payroll processing. If it is rejected, the expense will be returned to you for review and resubmission.

Please note that automated reminders are not issued for Expenses.

Quick Reference Guide

Log In and Set Up

- [ ] Confirm your login details from the email sent by your firm or organisation
- [ ] Go to the URL provided to log into Astute
- [ ] Enter login Username and Password. For forgotten login details, select Forgot Password and follow the prompts.
- [ ] Set up Two Factor Authentication
- [ ] Upon login, review and accept Compliance documents (if required)
- [ ] Check that all personal and banking details are entered (flagged fields should be filled out)

Submitting Timesheets

- [ ] Access timesheets from the Dashboard (‘Log Time’ or via Timesheet Summary) or from the Timesheets tab.
- [ ] Select ‘New Block’
- [ ] Select the job, project and pay rate(s) as required for each day in the timesheet period.
- [ ] Enter other information where relevant (eg Start Time, Finish Time, Breaks, Leave, Allowances, Notes) from the Timesheets for This Week menu.
- [ ] Attach any supporting documents by clicking ‘Add’ within an active time block.
- [ ] Indicate whether your employment is finishing by ticking the ‘My employment finishes this week’ checkbox. Leave blank if this doesn’t apply.
- [ ] Indicate if you have sustained a reportable workplace injury by changing the default drop down ‘I did not sustain a reportable workplace injury’ to ‘I did’.
- [ ] If you haven’t worked for the week, tick ‘I did not work for this period’ to switch off automated reminders for the timesheet period.
- [ ] Select ‘Submit’ to send the completed timesheet to your Approver.
- [ ] If multiple jobs are included on the one timesheet, choose which jobs to submit and click ‘Confirm’.

Submitting Expenses

- [ ] Open the Expenses tab
- [ ] Click New Expense Report
- [ ] Enter a name for your expense report and click Save
- [ ] Click on the report name to open it
- [ ] Select New Expense to add your expenses, enter the information and click Save. Repeat this process for any other expenses to be included in the one report.
- [ ] Click Submit Report to submit the expense claim for approval