

Employer Online

User Guide

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Introduction

Computershare Voucher Services (CVS) is pleased to introduce Employer Online (EOL), a new web-based service for employers. Our innovative solution gives you the hands on ability to control and manage your childcare voucher scheme, so you can benefit from the same secure online access already enjoyed by parents and carers.

Now that your account has been switched to EOL, we hope that you will enjoy using the new features, and they prove to be beneficial to your business.

This User Guide will introduce you to the key benefits of EOL, give step-by-step instructions to walk you through the main processes that you will want to carry out, and to act as a quick reference resource in future.

The main features of EOL are:

- > **Complete secure web access to your account for the named Primary Contact.**
- > **The ability to register additional users, who are also able to administer the account.**
- > **Four different access levels for users.**
- > **The ability to amend and agree orders, and raise invoices, online and in real-time.**
- > **The ability to backdate parents vouchers should they miss a month's deductions.**
- > **Ability to approve and amend parent tax bands based on our savings and eligibility calculator**
- > **24 hour online availability of payroll and invoice documentation.**

These features allow you to enjoy the following benefits:

- > **You now have direct control of your orders, giving you peace of mind that any amendments have been completed as required.**
- > **You can delegate responsibility for the account to any number of colleagues, helping delegate responsibility effectively.**
- > **Reduction in time spent on the telephone to or emailing CVS, when requesting amendments or copy documentation, is reduced.**
- > **You can use backdated vouchers to maximise the NI savings made by your business.**
- > **You now have direct web access to the aforementioned documentation, making it quicker than ever before to access information.**

Overview

Employer Online gives you, as an employer, complete direct control over your voucher account. To this end, in addition to the single main Primary Contact, there are different access levels available for additional users.

Payroll users have access to the payroll schedule documents, and have the ability to amend orders and add backdated vouchers. Finance users are able to log on once the order has been agreed, and download the invoice for payment. They are also able to add any required purchase order number to the invoice.

The table below shows which specific tasks can be performed by which level of user.

Employer Online task	Primary Contact	Payroll	Payroll and Finance	Finance
Add additional user	√	x	x	x
Reset password for all additional users	√	x	x	x
Reset own password	√	√	√	√
Delete additional user	√	x	x	x
Lock and unlock additional user	√	x	x	x
Agree order	√	√	√	x
Backdate voucher	√	√	√	x
Change voucher value	√	√	√	x
Exclude parent from order	√	√	√	x
Include parent on order	√	√	√	x
Print payroll schedule	√	√	√	x
Print invoice	√	√	√	√

Online account setup

When your account is switched to EOL, your Primary Contact will receive two emails on the same day. One will contain the Primary Contact ID (or User ID), which is the same as your scheme ID number, and the other will contain a randomly generated password.

Logging in

Once you have your User ID and password, you can then access your EOL account at:

www.computersharevoucherservices.com

User ID and password

The first time the Primary Contact logs in, they will be prompted to change their password to something more memorable, and answer three security questions, which will be required in the event of the password being forgotten. Should this happen, follow the 'Forgotten Password?' link underneath the log in details, and enter the answers to the security questions as prompted. They will then be able to enter a new password.

If you are the Primary Contact, and cannot answer your security questions, please email transactionprocessing@computershare.co.uk and we will be happy to help. If you are an

additional user and are unable to answer your security questions, please speak to your Primary Contact, they will be able to manually send a new password to your email address.

Emails

The Primary Contact will receive all email notifications sent with regards to the scheme. In addition, payroll users will receive all payroll notifications, and finance users will receive all finance notifications.

For security purposes, these emails will not contain the documents themselves, but will alert the user to the availability of new documentation available on EOL.

Please note, the only difference between a payroll and payroll/finance user is regarding the email notifications received. A payroll contact will only be notified when a payroll schedule is available to view and amend. A payroll/finance contact will be emailed regarding the payroll schedule *and* when the invoice is ready.

As such, if one person is responsible for all aspects of scheme administration, but they are not the Primary Contact, please register them as a 'payroll and finance'.

Payroll cut-off dates

Now that you are using EOL, it is important that you are aware of the window available to you in which you are able to amend your orders after they have been raised. If you do not agree an order in EOL before this window closes, then we assume that there are no problems with the order and agree it automatically. This ensures that your parents are not inconvenienced by a late voucher release.

As standard, this window is 72 hours. This means that, for example, an order raised on Monday morning will be agreed on Thursday morning, regardless of whether or not you have made any necessary amendments. In case you are unsure when your orders are raised, the Primary Contact and payroll contacts will be automatically notified by email when an order is raised.

This does not affect any existing agreement otherwise that you may have with CVS regarding payroll cut-off dates. Switching to EOL will not change your current cut-off dates in any way.

Once your order has been agreed, automatically or otherwise, we are unable to re-open it, so any parents you have not added will need to have one month backdated on your next order.

An important note on privacy

Computershare takes your privacy seriously. Employers who are given passwords to Employer Online will have access to sensitive, non-public personal information about your parents.

We advise you to exercise reasonable care in providing staff access to your parents' records and ensure that those with access understand the confidentiality of that information.

We also encourage you to ensure that your employees are fully aware of the requirements to the Data Protection Act 1998 before they access EOL.

April 2011 tax level changes

As of 6 April 2011, the Government is reducing the level of tax relief on childcare vouchers for Higher and Additional rate tax payers who sign up on or after the 6 April. They are doing this to ensure that the amount of tax relief on childcare vouchers will be the same regardless of what tax band the parent comes under.

Higher and Additional rate tax-payers joining a scheme from 6 April would see their tax free voucher entitlement reduced, and therefore see their tax savings reduced to come into line with Basic rate taxpayers at around £600.

Basic rate tax-payers will not be affected and, due to the higher rate of National Insurance (NI) they are also saving, will still be able to save around £933 a year. In addition, anyone who signs up for childcare vouchers before 6 April 2011 will have protected rights, and will still benefit from the maximum amount of tax relief, regardless of their income.

Tax bands

For the purposes of childcare vouchers, there are three different tax bands that parents may fall into, dependant on their annual salary.

Personal Allowance = £00.00 to £7,475

Basic rate = £7,475 to £42,475

Higher rate = £42,475 to £150,000

Additional rate = £150,000 and above

Please note these tax bands are for the 2011/2012 tax year and are liable to change in future years.

As previously mentioned, parents in different tax bands are entitled to different tax free voucher values. This ensures that all parents save an equal amount of tax regardless of their income.

Please note, savings on NI contributions are not considered, meaning that Basic rate taxpayers, who pay a higher rate of NI, save more overall than Higher and Additional rate taxpayers.

For the 2011/2012 tax year, the tax-free voucher allowances are as follows:

	Basic Rate	Higher Rate	Additional Rate
Weekly	£55	£28	£22
Fortnightly	£110	£56	£44
4 Weekly	£220	£112	£88
Monthly	£243	£124	£97
Bi-Monthly	£486	£248	£194
Quarterly	£729	£372	£291

It is your responsibility as an employer to ensure that each parent on your scheme is claiming the correct value of vouchers with respect to their tax band. As such, CVS cannot be held liable for any HMRC action brought against you, or your employees, as a result of these tax bands being incorrect.

To ensure the parent is in the correct tax band, a Basic Earnings Assessment for each parent must be carried out once every 12 months.

Basic Earnings Assessment

Employers must carry out a Basic Earnings Assessment to determine the tax band of any employee who joins a scheme on or after 6 April 2011. This assessment must be carried out when they first join the scheme, and once every tax year thereafter.

The value of vouchers that the employee can receive is determined by the result of the Basic Earnings Assessment. Once completed, the assessment remains valid for the remainder of the current tax year.

When assessing an employee's earnings, the following should be considered:

- > Basic pay as stated in the employee's contract of employment
- > Contractual or guaranteed bonuses
- > London weighting or other regional allowances
- > Taxable benefits
- > Shift allowances.

The following earnings and benefits should be excluded from the Basic Earnings Assessment:

- > Performance related or discretionary bonuses
- > Overtime payments
- > Earnings and benefits which are exempt from tax such as pension contributions, employee share schemes and payroll charitable donations.

There is no need to make an assessment for any parent currently enjoying Protected Rights.

Please note:

The above information should be used as a guide only. Please refer to HMRC or your company tax advisor for full details of your responsibilities as an employer.

Effect of amending a parent's tax band

Please be aware that increasing a parent's tax band (for example, from Basic rate to Higher rate) could result in the tax-free contribution for the parent being reduced.

This will occur if the current tax free contribution is greater than the tax-free limit for the new tax band. For example, a parent claiming £243 vouchers a month as a Basic rate taxpayer is changed to Higher rate. They cannot continue to claim £243 of vouchers as this is greater than their new tax band's limit of £124.

When this happens, the tax-free voucher order will be automatically reduced to the cap amount for the new tax band. In the example above, the parent's voucher order will automatically be reduced to £124 on the current, and every subsequent, order.

This reduction will affect any voucher denominations that the parent had set up, so they will need to check these.

Decreasing a parent's tax band (for example, from Higher rate to Basic rate) will not change the parent's tax-free contribution. Computershare Voucher Services will never automatically increase any parent's childcare voucher order.

However, the change will mean that the parent is eligible to make a higher tax-free contribution if they so desire, and you will be able to amend the order in the usual way if this is the case.

Protected Rights

What does Protected Rights mean?

- > If a parent qualifies for Protected Rights they will be able to continue purchasing the maximum tax-free amount of vouchers, regardless of their income, unless the deductions from their salary cause them to fall below the national minimum wage.
- > They will continue to be entitled to the maximum tax-free allowance, regardless of their earnings, until they are no longer eligible to purchase childcare vouchers (for example, the children are all over 16) **or** until they lose their Protected Rights.

Who is eligible for Protected Rights?

- > All parents registered in a scheme on or before 5 April 2011, as long as they have an ongoing order on the system **or** have purchased childcare vouchers within the past twelve months.
- > Parents who join a scheme on or before 5 April 2011, but do not receive their first order until 6 April 2011 or later, **will** be given Protected Rights.

How can a parent make sure they keep their Protected Rights?

- > A parent may temporarily stop purchasing childcare vouchers (for example, during school holidays).
- > However, to retain their protected rights they **must** purchase childcare vouchers at least once every twelve months.

What would cause a parent to lose their Protected Rights?

- > They stop purchasing vouchers for more than 12 consecutive months.
- > They change employer (**unless** this is a TUPE transfer and they have continuous service, **or** it is as a result of a business merger or reorganisation).

Can a parent take a break from childcare vouchers and retain Protected Rights?

- > A parent can take a temporary break from vouchers whilst remaining in a scheme, for example during school holidays, or whilst they are on maternity leave.
- > When the parent ends this break, they will not be treated as a new joiner unless the overall period in which childcare vouchers have not been taken exceeds 12 months. If it does, they will have lost their Protected Rights.

What if an employer changes voucher provider?

- > Details of employees with protected rights will be transferred to the new voucher provider, and parents will continue to enjoy Protected Rights.

What about parents who join a scheme on or after 6 April 2011?

- > A parent who signs up to buy childcare vouchers for the first time from 6 April 2011 onwards will **not** have Protected Rights.

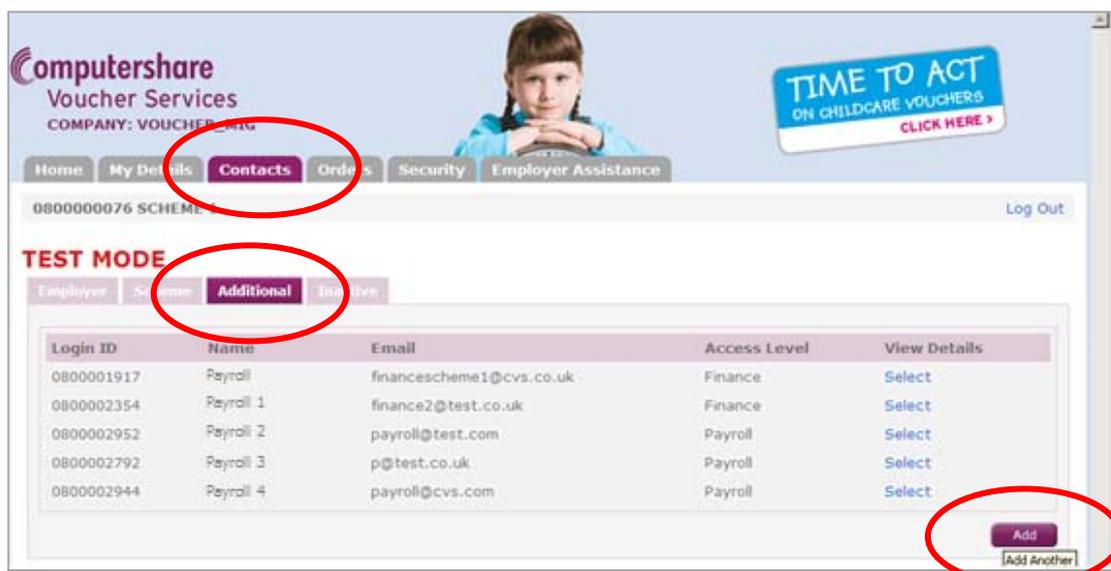
What happens when an employer is taken over by or merges with another firm?

- > If your company has merged with or been taken over by another company, or if your employer changes due to a business reorganisation, then any parents that originally enjoyed Protected Rights will continue to do so, unaffected by the change. Any transfer of staff under a TUPE arrangement is also covered by this exemption.

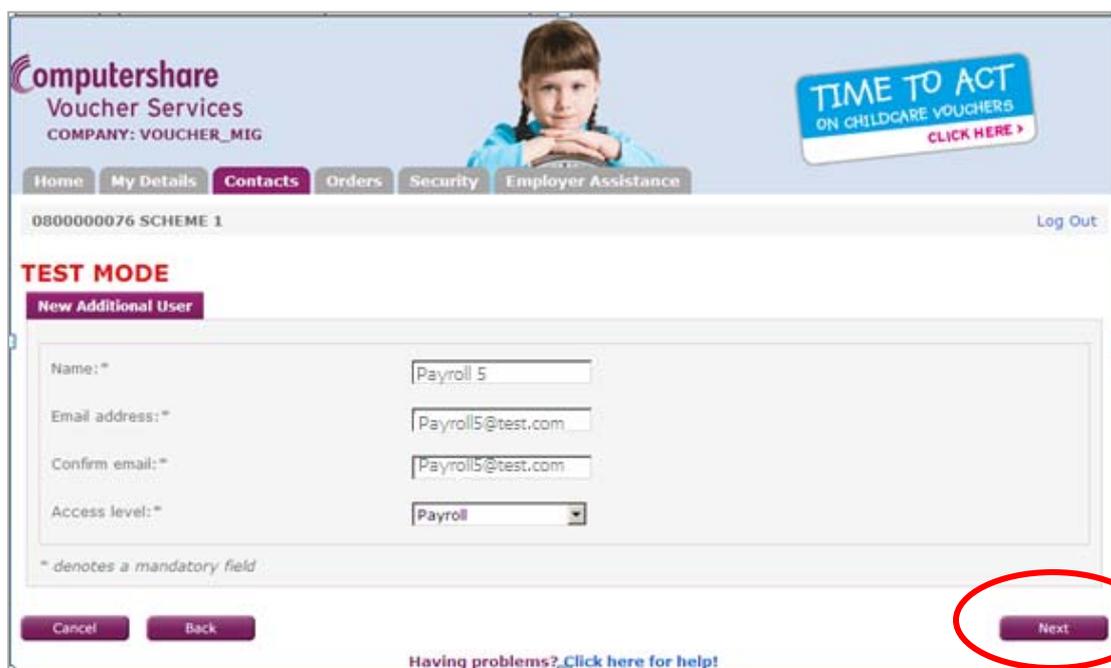
Step-by-Step Guides

Setting up additional users

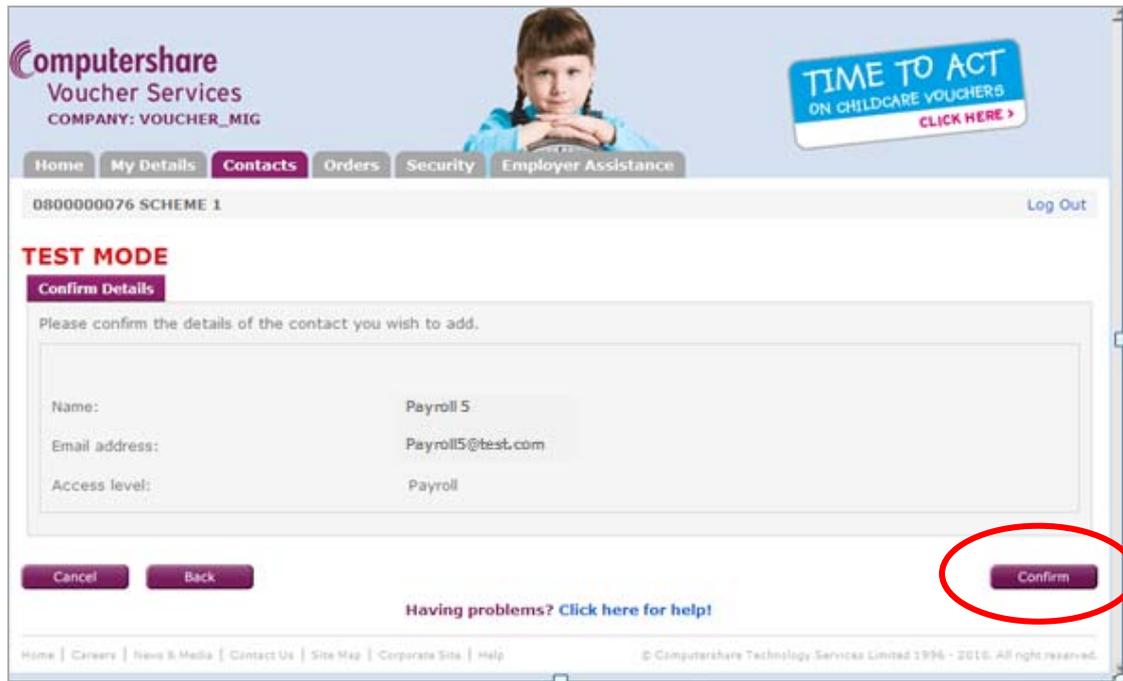
1. Log in to your account.
2. Select 'Contacts' tab at top of screen.
3. Select the 'Additional' tab.



4. Select 'Add'.
5. The 'New Additional User' screen will appear, prompting you to enter the details and access level of the new additional user.



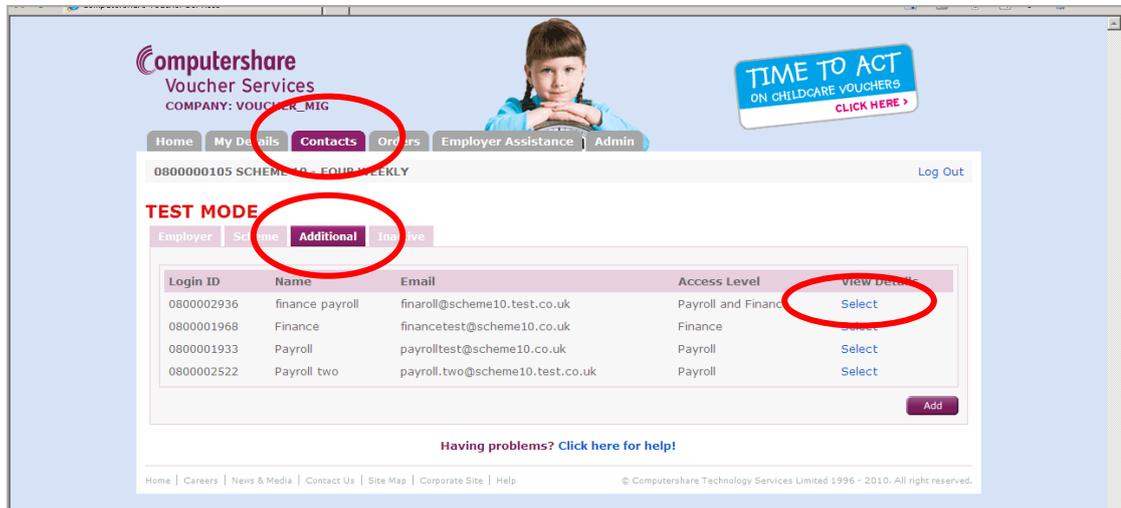
6. Click 'Next'.
7. Review the details given, then click 'Confirm', and 'Finish'.



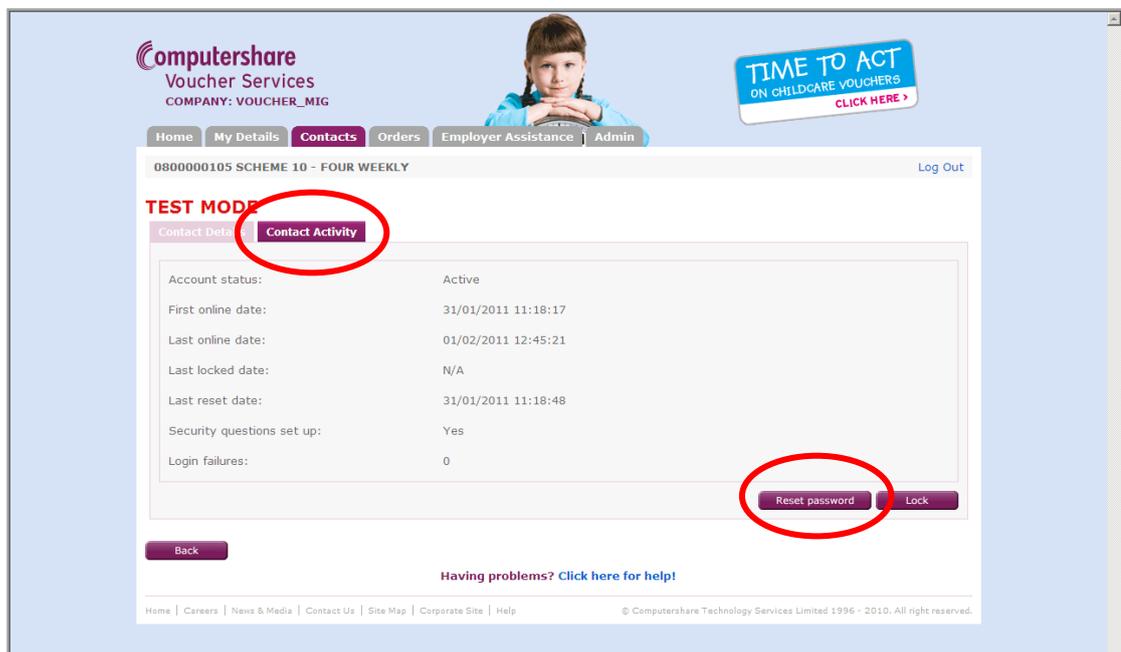
8. The new additional user will now receive two emails on the same day, one containing their User ID, and another containing their password.
9. You will be returned to the list of additional users. Check that the new additional user is now listed.
10. The first time the new user logs on, they will be prompted to change their password and set some security questions. These may be required to verify the user's identity in the future.

Resetting the password of an additional user

1. Select the 'Contacts' tab at top of screen.
2. Select 'Additional' tab.
3. Click 'Select' alongside the relevant contact's name.



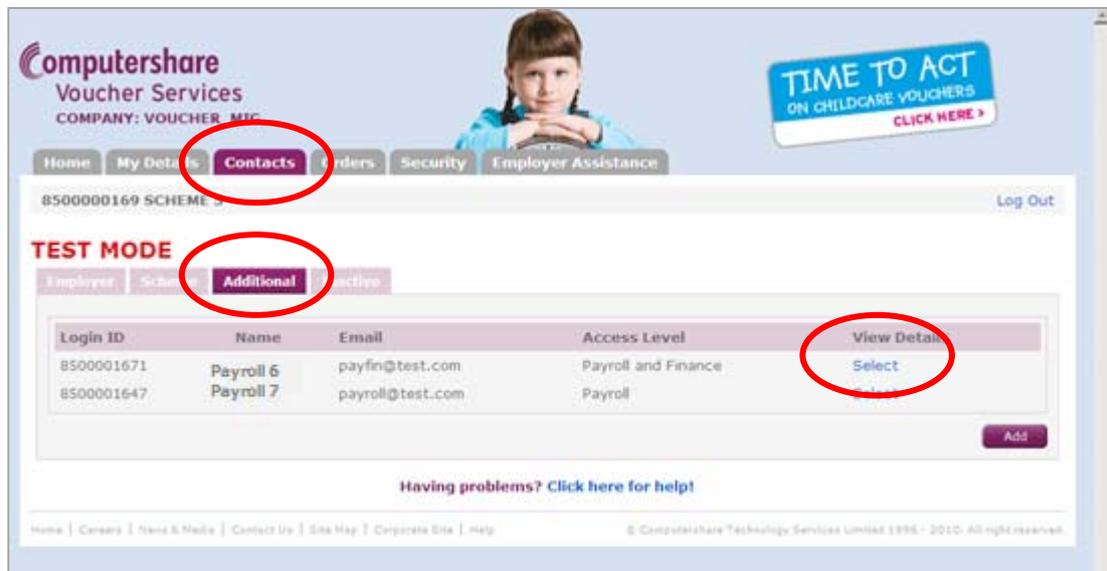
4. Select the 'Contact Activity' tab.
5. Click 'Reset password'.



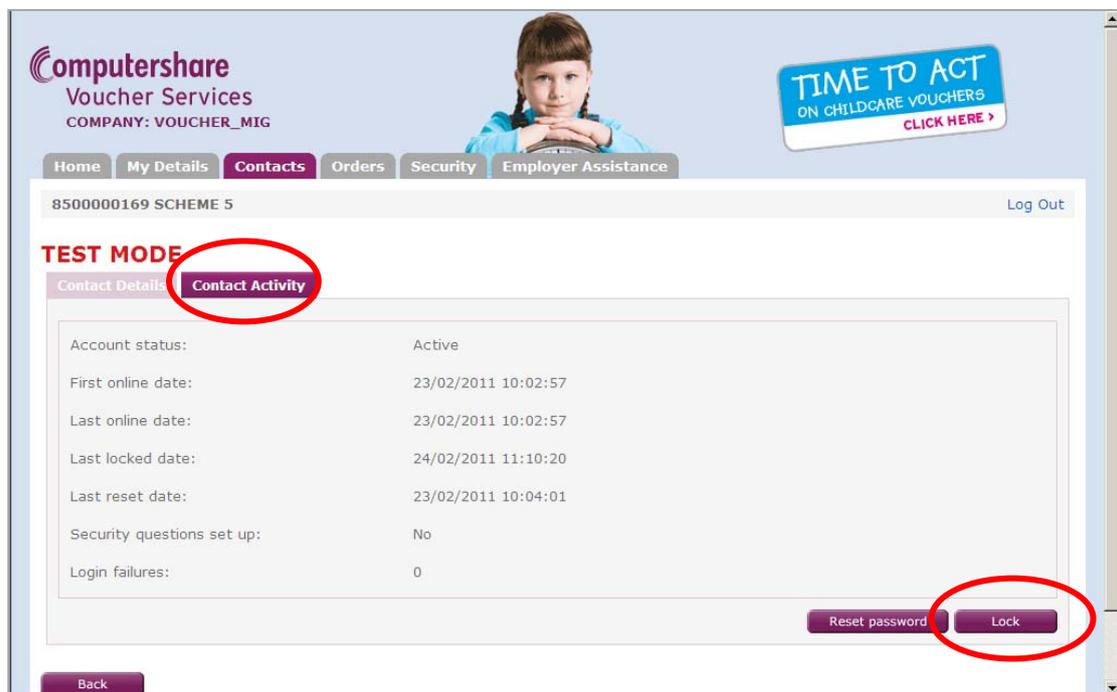
6. A new password will be emailed to the additional user, and they will be prompted to change it when they next log in.

Locking and unlocking additional users

1. Select 'Contacts' tab at top of screen.
2. Select 'Additional' tab.



3. Click 'Select' alongside the additional user's name which needs to be locked.
4. Select 'Contact Activity' tab.



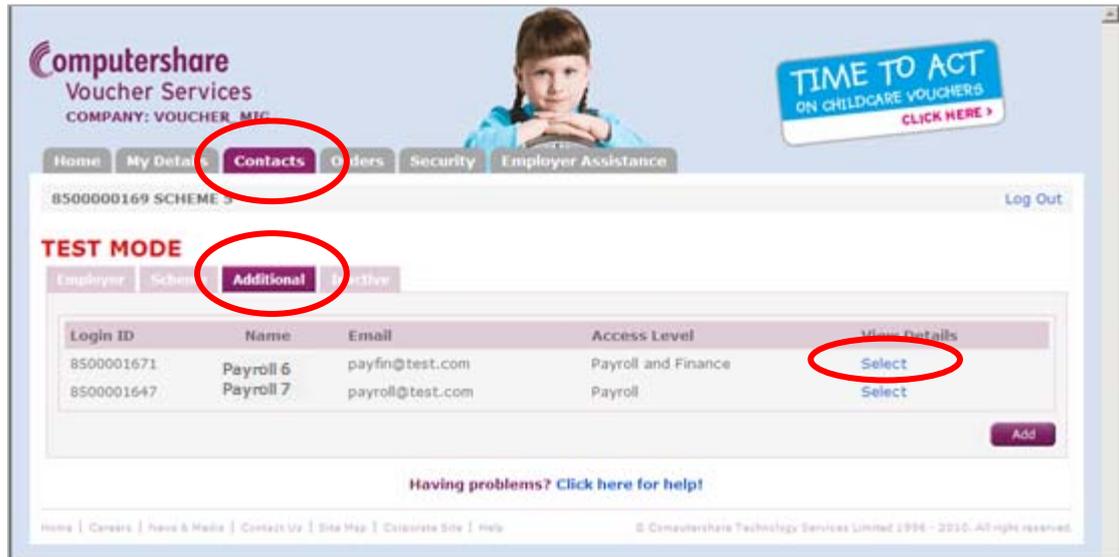
5. Click on 'Lock'. This will disable access to the user's online account.
6. When the user needs to be unlocked, repeat the process. The 'Lock' button will be replaced with an 'Unlock' button.

Deleting an additional user

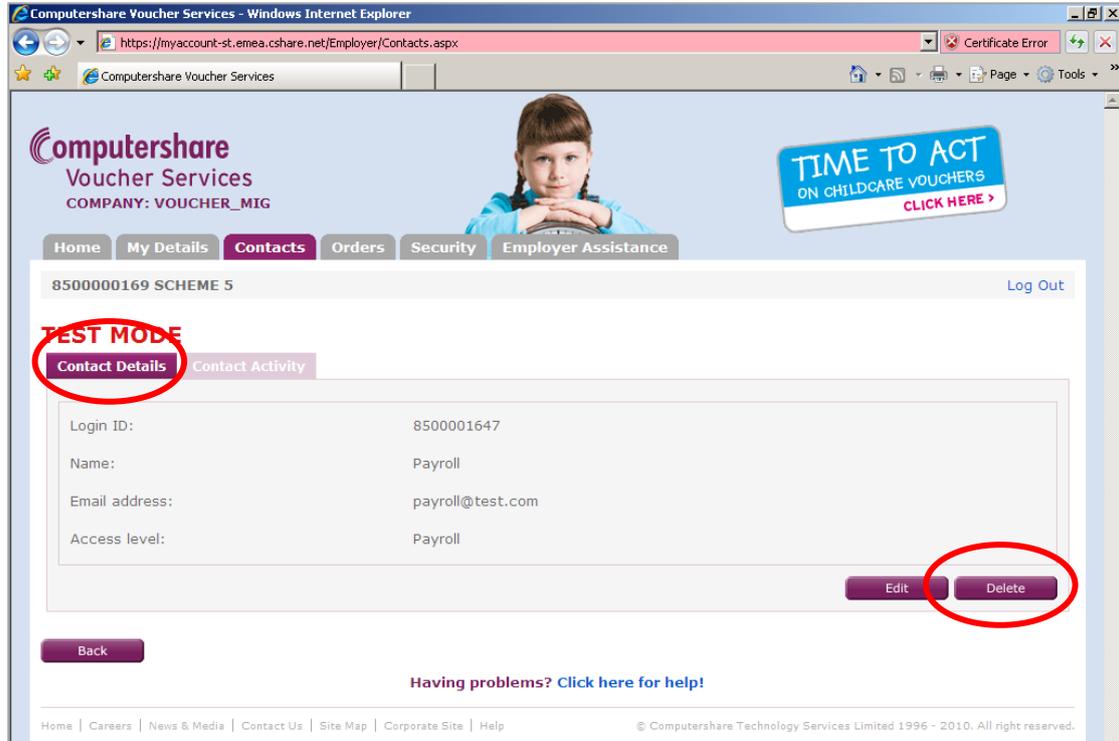
In order to delete an additional user, follow the steps below.

Please note that once a user has been deleted you cannot reinstate them.

1. Select 'Contacts' tab at top of screen.
2. Select 'Additional' tab.

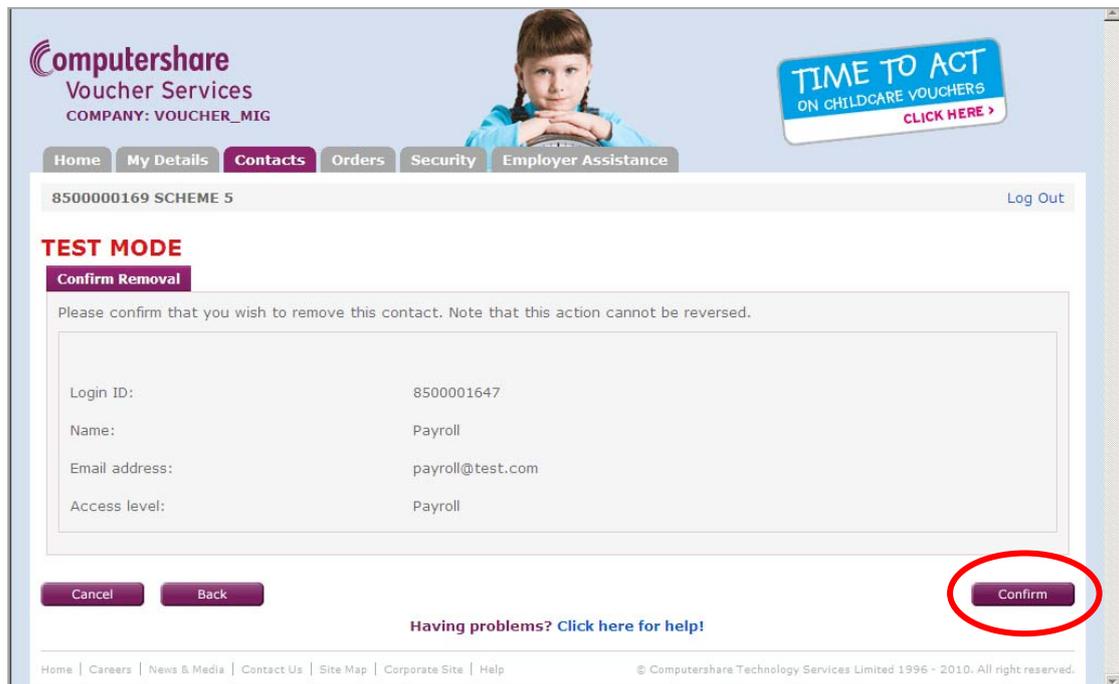


3. Click 'Select' alongside the additional user's name which needs to be deleted.



4. Select 'Contact Details' tab.
5. Click 'Delete'.

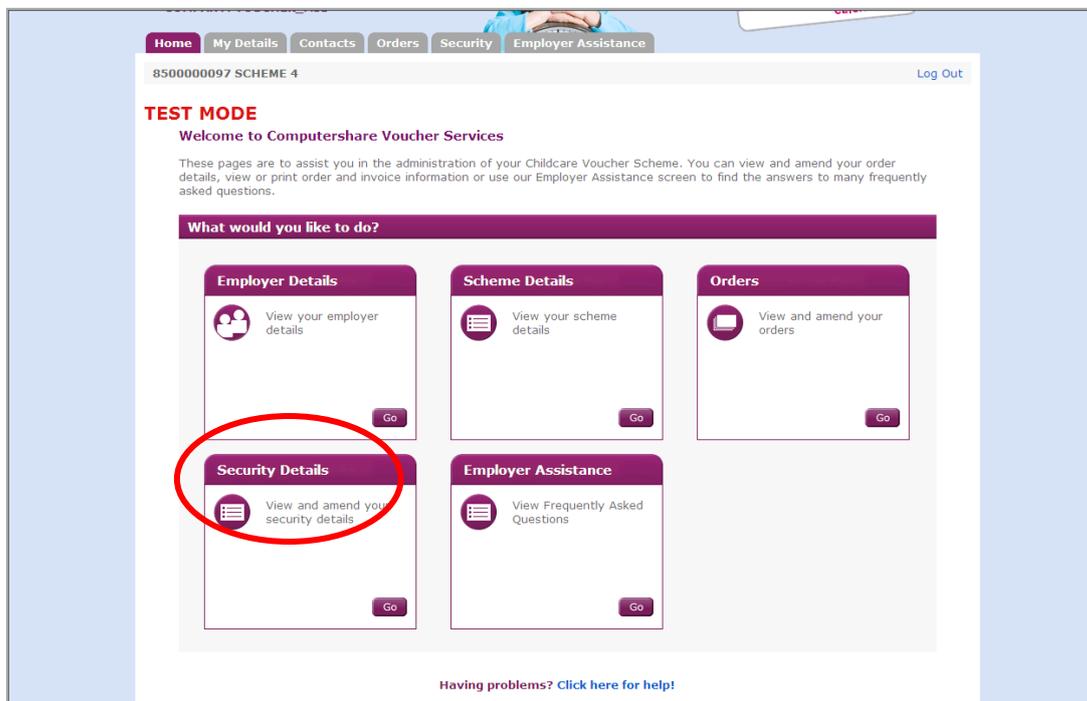
6. You will see a confirmation screen. Ensure that this is the correct user, click 'Confirm', then 'Finish'.



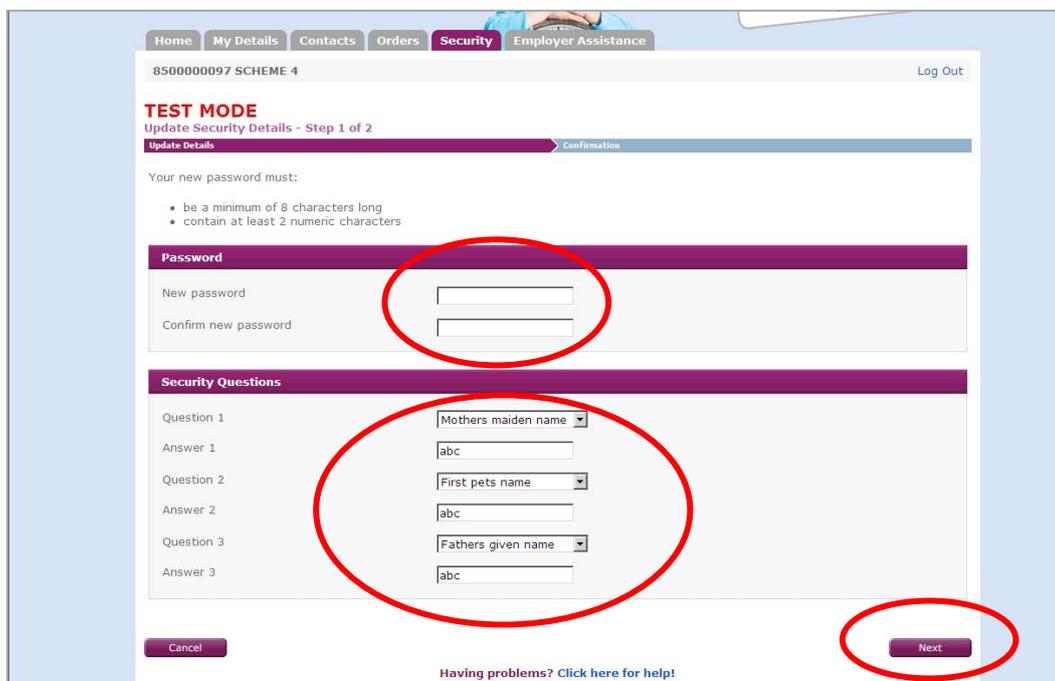
7. You will then be returned to the list of remaining additional users. The deleted users will have moved to the 'Inactive' tab.

Changing your password

1. Select 'Security Details' from your home screen.



2. Enter your new password twice and your Security Questions and click 'Next'.



3. Your security details have now been changed and you will need to use the new details next time you log into your account.

Viewing a payroll schedule online

1. Log in to your account.
2. Click on the 'Orders' tab.

Computershare
Voucher Services
COMPANY: VOUCHER_MIG

Home My Details **Orders** Employer Assistance Admin

850000097 SCHEME 4 [Log Out](#)

TEST MODE
Your Orders

Scheme ID: 850000097 Scheme name: SCHEME 4
Invoice preference: Combined Voucher Funding and Service Charge Invoice

These are the orders for your scheme.

Filter Options

Payroll Date - From: [dd/MM/yyyy]
Payroll Date - To: [dd/MM/yyyy]
Order Number:
 Include cancelled orders [Search](#)

Payroll Date	Invoice Number	Voucher Order Number	Number of Parents	Order Status	Payroll Schedule	Voucher/Service Invoice
21/04/2011	C0000000024	0000000021	5	Closed	View	View
25/03/2011	C0000000002	0000000003	3	Closed	View	View

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3. Click 'View' in the Payroll Schedule column of the order which you wish to view.

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: 25TH OF EACH MONTH
Payroll date: 25/03/2011
Assumed agreed date: 18/03/2011
Order status: Closed

Tax Band Approval

There are 0 employees in this order who must have their tax band approved. [View / Amend](#)

Order Details

Order number: 0000000003
Number of parents: 3 [View / Amend](#)

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	3	686.00	686.00
Parents voucher value increased	0	0.00	0.00
Parents voucher value decreased	0	0.00	0.00
No change to parents voucher value	0	0.00	0.00
Cancelled / expired parents orders	0	0.00	0.00
Excluded parents	0	0.00	0.00
Total	3	686.00	686.00

Please refer to your Payroll Schedule for full details of individual orders. [Download as PDF](#)

4. You have now reached the payroll schedule screen. This screen is the start page for all of the following processes.

Printing payroll schedules and invoices

To print a payroll schedule:

1. Navigate to the payroll schedule screen by selecting the 'Orders' tab.
2. Click 'View/Amend'.

Home My Details Contacts **Orders** Security Employer Assistance

850000097 SCHEME 4 Log Out

TEST MODE

Payroll Schedule Summary

Scheme ID: 850000097 Scheme name: SCHEME 4
Order ID: 000000003

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: 25TH OF EACH MONTH
Payroll date: 25/03/2011
Assumed agreed date: 18/03/2011
Order status: Closed

Order Details

Order number: 000000003
Number of parents: 3

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	3	686.00	686.00
Parents whose value increased	0	0.00	0.00

[View / Amend](#)

3. You then have a choice. You can either click 'Download as PDF' to download a printable summary and parent-by-parent breakdown of your order, or you can click 'Download as CSV' to download an Excel file containing the order information.

Payroll Schedule Details

Scheme ID: 850000097 Scheme name: SCHEME 4
Order ID: 000000021 Payroll date: 21/04/2011

Filter Options

Category New Increased Decreased No Change Cancelled/Expired Excluded

Payroll ID

No Number

[Apply](#)

Voucher Type Key: E = e-Voucher / P = Paper / R = Redeem Direct

Parent Name	Payroll ID	NI Number	Tax band	Tax band Approval	Voucher Type	Amount	Backdated Amount	Status	
Parent One	A999	22878787A	Additional Rate	APPROVED	E	£97.00	£0.00	Included Auto	Exclude Amend
Parent Two	14	AB000177A	Protected Rights	APPROVED	E	£243.00	£0.00	Included Auto	Exclude Amend
Parent Three	11	AB000174A	Protected Rights	APPROVED	E	£243.00	£0.00	Included Auto	Exclude Amend
Parent Four	2525	CC566666C	Basic Rate	PENDING	E	£0.00	£0.00	Excluded Employer	Include Amend
Parent Five	13	AB000176A	Protected Rights	APPROVED	R	£100.00	£0.00	Included Auto	Exclude Amend
Parent Six	12	AB000175A	Protected Rights	APPROVED	R	£243.00	£0.00	Included Auto	Exclude Amend

Participants: 5 Voucher Value: £926.00

[Download as PDF](#) [Download as CSV](#)

To print an invoice

1. Agree your order, or wait for it to be agreed (see below).
2. Click the 'Orders' tab at the top of your screen.
3. Click 'View' in the invoice column, next to the order for which invoices are required.

Computershare Voucher Services
COMPANY: VOUCHER_MIG

Home My Details **Orders** Security Employer Assistance

8500000097 SCHEME 4 [Log Out](#)

TEST MODE

Your Orders

Scheme ID: 8500000097 Scheme name: SCHEME 4
Invoice preference: Combined Voucher Funding and Service Charge Invoice

These are the orders for your scheme.

Filter Options

Payroll Date - From: [] [dd/MM/yyyy]
Payroll Date - To: [] [dd/MM/yyyy]
Order Number: [] [Search](#)

Payroll Date	Invoice Number	Voucher Order Number	Number of Parents	Order Status	Payroll Schedule	Voucher/Service
25/03/2011	C0000000002	0000000003	3	Closed	View	View

[Back](#)

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4. Click 'Download as PDF'.

Home My Details **Orders** Security Employer Assistance

8500000097 SCHEME 4 [Log Out](#)

TEST MODE

Your Invoice

Scheme ID: 8500000097 Scheme name: SCHEME 4
Order ID: 0000000003

Combined

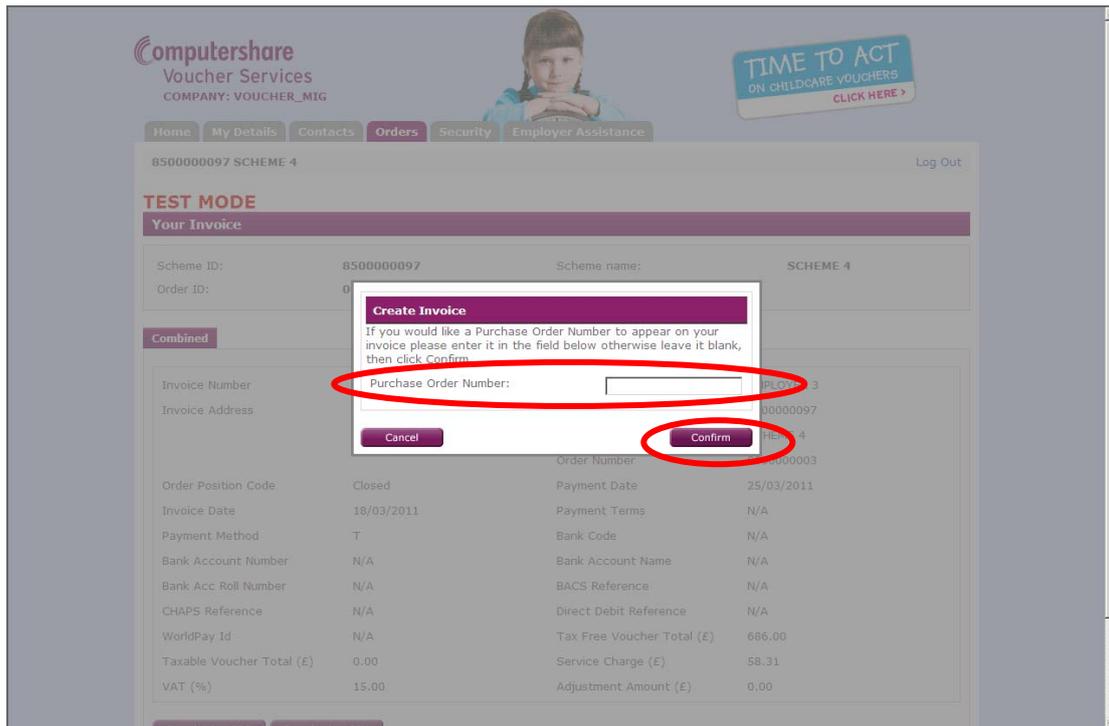
Invoice Number	C0000000002	Company Name	EMPLOYER 3
Invoice Address	UNIT 6 FANGTASIA BUSINESS PARK B78 1BP	Scheme ID	8500000097
		Scheme Name	SCHEME 4
		Order Number	0000000003
Order Position Code	Closed	Payment Date	25/03/2011
Invoice Date	18/03/2011	Payment Terms	N/A
Payment Method	T	Bank Code	N/A
Bank Account Number	N/A	Bank Account Name	N/A
Bank Acc Roll Number	N/A	BACS Reference	N/A
CHAPS Reference	N/A	Direct Debit Reference	N/A
WorldPay Id	N/A	Tax Free Voucher Total (£)	686.00
Taxable Voucher Total (£)	0.00	Service Charge (£)	58.31
VAT (%)	15.00	Adjustment Amount (£)	0.00

[Download as PDF](#) [Download as CSV](#)

[Back](#)

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5. If you require a Purchase Order Number on the invoice, enter it in the pop up box. Otherwise, leave the box blank and click 'Confirm'.



6. A printable PDF will then download.

Adding a parent to an open order

1. Navigate to the 'View Payroll' screen by selecting the 'Orders' tab.

Home My Details **Orders** Security Employer Assistance

850000097 SCHEME 4 Log Out

TEST MODE

Payroll Schedule Summary

Scheme ID: 850000097 Scheme name: SCHEME 4
Order ID: 000000003

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: 25TH OF EACH MONTH
Payroll date: 25/03/2011
Assumed agreed date: 18/03/2011
Order status: Closed

Order Details

Order number: 000000003
Number of parents: 3 **View / Amend**

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	3	686.00	686.00
Parents voucher value increased	0	0.00	0.00

2. Select 'View/Amend'.

Home My Details Contacts **Orders** Security Employer Assistance

850000126 SCHEME 1 Log Out

TEST MODE

Payroll Schedule Details

Scheme ID: 850000126 Scheme name: SCHEME 1
Order ID: 000000011 Payroll date: 08/04/2011

Filter Options

Category New Increased Decreased No Change Cancelled/Expired Excluded
Payroll ID
NI Number
Apply

Backdated order **Add participant**

Parent Name	Payroll ID	NI Number	Voucher Type	Amount	Backdated Amount	Status		
PARENT FOUR	4	A000165A	e-Voucher	£55.00	£0.00	Included Auto	Exclude	Amend
PARENT ONE	1	A000161A	Paper	£0.00	£0.00	Excluded CVS	Include	Amend
PARENT THREE	3	A000164A	e-Voucher	£75.00	£0.00	Included Auto	Exclude	Amend
PARENT TWO	2	A000163A	Redeem Direct	£55.00	£0.00	Included Auto	Exclude	Amend

Participants: 3 Voucher Value: £185.00

Download as PDF Download as CSV

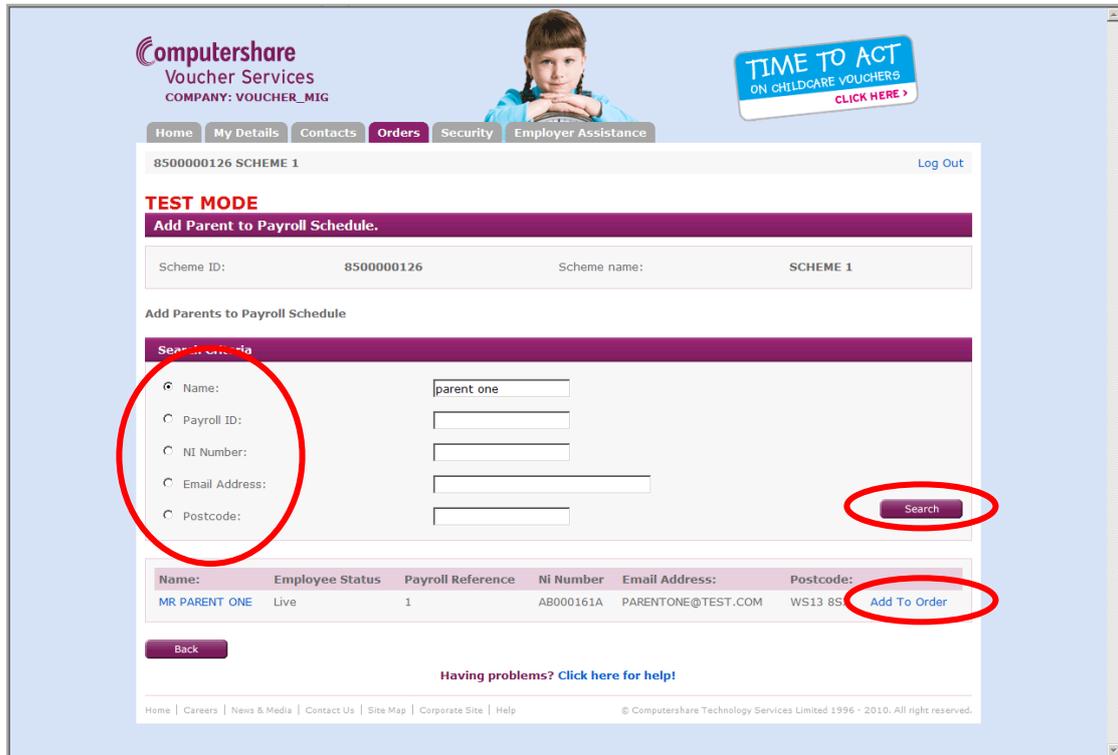
Back

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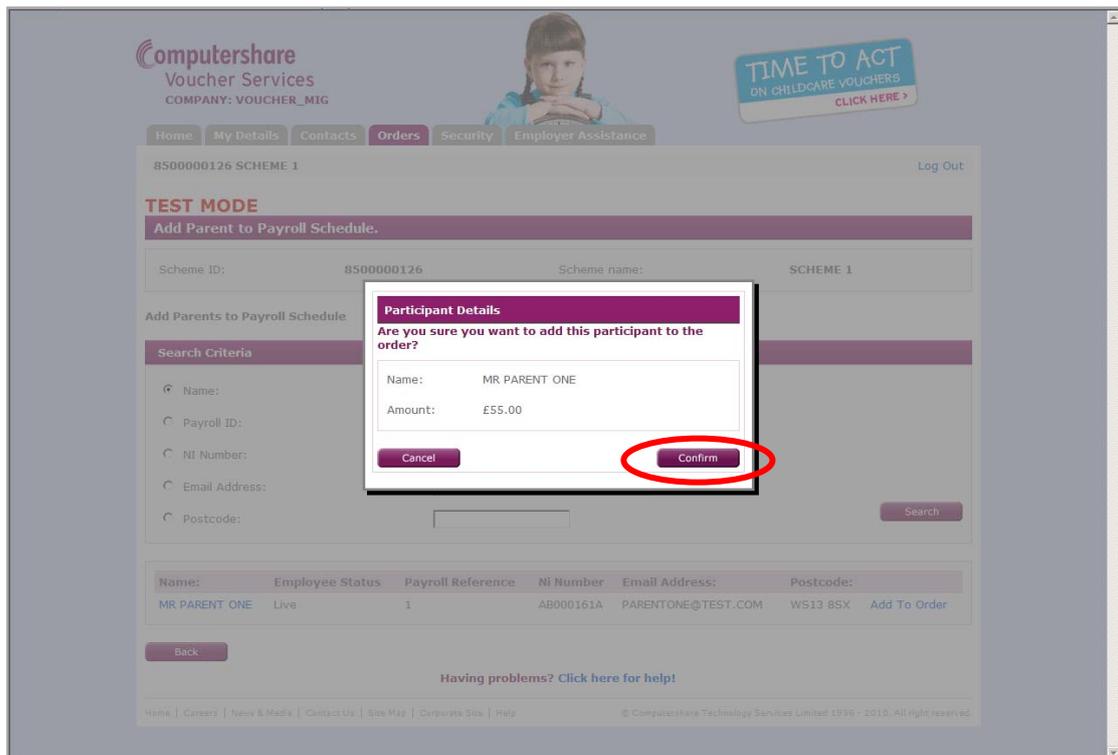
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3. Select 'Add participant'.

4. Search for the parent you wish to add onto the order, by using one of the search fields, and then click on 'Search'.



5. Once you find the relevant parent, select 'Add To Order' next to their name.



6. A pop up box will appear. Check and select 'Confirm'. The parent has now been added to the order.

Open orders

Whilst your order is open on the system you can carry out the following actions; Amendments, tax band approvals, and tax band edits.

Amending an open order

1. Navigate to the 'Payroll Schedule Details' screen of the order you wish to amend.
2. Click 'View/Amend'.

Scheme ID: 8500000126 Scheme name: SCHEME 1
Order ID: 0000000011

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: EVERY FRIDAY
Payroll date: 08/04/2011
Assumed agreed date: N/A
Order status: Open [Agreed](#)

Order Details

Order number: 0000000011
Number of parents: 3 [View / Amend](#)

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	0	0.00	0.00
Parents voucher value increased	0	0.00	0.00
Parents voucher value decreased	0	0.00	0.00
No change to parents voucher value	3	0.00	185.00
Cancelled / expired parents orders	1	-55.00	0.00
Excluded parents	0	0.00	0.00
Total	3	-55.00	185.00

Please refer to your Payroll Schedule for full details of individual orders. [Download as PDF](#)

3. You will then see an online list of all the parents included on the order. They are listed in alphabetical order by first name.
4. Navigate to the parent that you wish to amend, and click 'Amend' next to their name.

Home My Details Contacts **Orders** Employer Assistance Admin Log Out

8500000126 SCHEME 1

TEST MODE

Payroll Schedule Details

Scheme ID: 8500000126 Scheme name: SCHEME 1
Order ID: 0000000011 Payroll date: 08/04/2011

Filter Options

Category New Increased Decreased No Change Cancelled/Expired Excluded
Payroll ID
NI Number [Apply](#)

[Backdated orders](#) [Add participant](#)

Parent Name	Payroll ID	NI Number	Voucher Type	Amount	Backdated Amount	Status	
PARENT FOUR	4	AB000165A	e-Voucher	£55.00	£0.00	Included Auto	Exclude Amend
PARENT ONE	1	AB000161A	Paper	£0.00	£0.00	Excluded CVS	Include Amend
PARENT THREE	3	AB000164A	e-Voucher	£75.00	£0.00	Included Auto	Exclude Amend
PARENT TWO	2	AB000163A	Redeem Direct	£55.00	£0.00	Included Auto	Exclude Amend

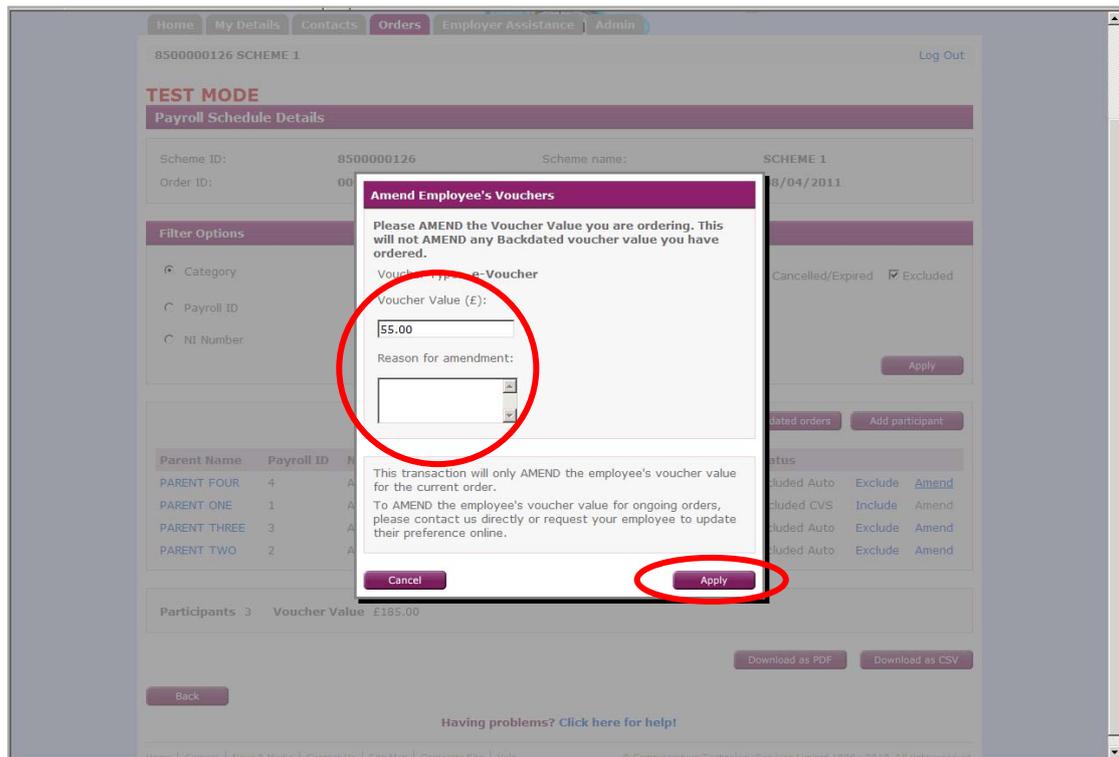
Participants 3 Voucher Value £185.00

[Download as PDF](#) [Download as CSV](#)

[Back](#)

Having problems? [Click here for help!](#)

- In the pop up box, enter the new Voucher Value, a reason for the amendment, and click 'Apply'.



- If you wish to remove a parent from an order altogether, click 'Exclude' next to the parents name, instead of 'Amend'. Please note that this will remove them from this order only, and they will be back on the next order. To remove the parent from all future orders, please email transactionprocessing@computershare.co.uk to request this.
- Repeat this process for all the parents that need amending.
- Once the amendments are complete, you can agree the order as above.

Approving parent's tax bands

1. Click 'View and Amend'

Payroll Schedule Summary

Scheme ID: 0079004070 Scheme name: MONTHLY - TAXABLE CAPPED
Order ID: 0000002650

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: 25TH OF EACH MONTH
Payroll date: 25/02/2011
Assumed agreed date: 23/02/2011
Order status: Open Agreed

Tax Band Approval

There are 12 employees in this order who must have their tax band approved. View / Amend

Order Details

Order number: 0000002650

2. Parents can be selected for approval one at a time by checking the individual checkboxes, or you may select all the parents on a page by clicking 'Select all'.

3. Where the unapproved parents span more than one page, you can move forward and back, using the 'Back' and 'Next' buttons/arrows.

Approval Required		Previously Approved			
Name	National Insurance	Payroll ID	Tax Band	Change Band	Approve
MR PARENT ONE	MB000000A	1	BASIC RATE	Edit	<input type="checkbox"/>
MRS PARENT TWO	MB222222A	2	BASIC RATE	Edit	<input type="checkbox"/>
MR PARENT THREE	MB030303A	3	BASIC RATE	Edit	<input type="checkbox"/>
MRS PARENT FOUR	MB040404A	4	HIGHER RATE	Edit	<input type="checkbox"/>
MR PARENT FIVE	MB060606A	5	HIGHER RATE	Edit	<input type="checkbox"/>
MRS PARENT SIX	MB666666A	6	HIGHER RATE	Edit	<input type="checkbox"/>
MR PARENT SEVEN	MB070707A	7	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MRS PARENT EIGHT	MB080808A	8	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MR PARENT NINE	MB090909A	9	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MRS PARENT TEN	MB101010A	10	PROTECTED RIGHTS	Edit	<input type="checkbox"/>

<< Back Next >>

Page 1 of 2 Confirm

4. Once all tax bands have been approved click 'Confirm'. Once approved, these parents will then appear on the 'Previously Approved' tab.

Editing parent's tax bands

1. Clicking the 'Edit' link will make the tax band editable.
2. Choose a new tax band from the drop down list and click 'Change' to update the tax band. Click 'Cancel' to close the edit function
3. Once all changes have been made click 'Confirm' to update all changes.

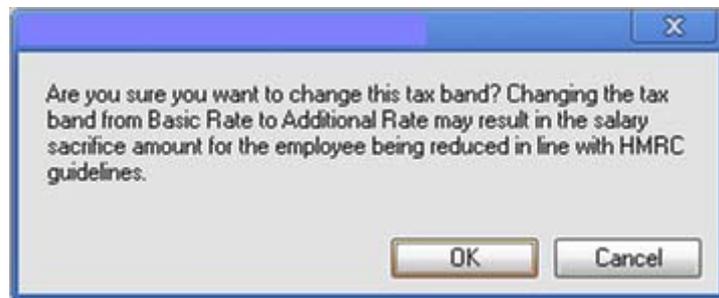
Approval Required		Previously Approved			
Name	National Insurance	Payroll ID	Tax Band	Change Band	Approve
MR PARENT ONE	MB000000A	1	Additional Rate	Change Cancel	<input type="checkbox"/>
MRS PARENT TWO	MB222222A	2	Basic Rate	Edit	<input type="checkbox"/>
MR PARENT THREE	MB030303A	3	Higher Rate	Edit	<input type="checkbox"/>
MRS PARENT FOUR	MB040404A	4	Additional Rate	Edit	<input type="checkbox"/>
MRS PARENT FIVE	MB060606A	5	Protected Rights	Edit	<input type="checkbox"/>
MR PARENT SIX	MB040404A	4	Personal Allowance	Edit	<input type="checkbox"/>
MR PARENT SEVEN	MB060606A	5	HIGHER RATE	Edit	<input type="checkbox"/>
MRS PARENT EIGHT	MB666666A	6	HIGHER RATE	Edit	<input type="checkbox"/>
MR PARENT NINE	MB070707A	7	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MRS PARENT TEN	MB080808A	8	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MR PARENT NINE	MB090909A	9	ADDITIONAL RATE	Edit	<input type="checkbox"/>
MRS PARENT TEN	MB101010A	10	PROTECTED RIGHTS	Edit	<input type="checkbox"/>

<< Back Next >>

Page 1 of 2

Confirm

When changing a tax band, a warning message will be displayed before an update is processed:



Clicking 'OK' will prompt the following warning message to be displayed:



Click 'OK' if you are happy to proceed.

Updating a previously approved tax band

Full Search

1. The full search will retrieve all parents on the order with a previously approved tax band.

Advanced Search

2. One or more of the search criteria can be used to locate a parent or parents with a previously approved tax band.

The screenshot shows a web interface with two tabs: 'Approval Required' and 'Previously Approved'. The 'Previously Approved' tab is active. Below the tabs, there are two search sections: 'Full Search' and 'Advanced Search'. The 'Full Search' section has a text input field with the placeholder 'Search for all previously approved parents on this order' and a 'Search' button. The 'Advanced Search' section has five input fields for 'Name:', 'Payroll reference:', 'National insurance number:', 'Email address:', and 'Postcode:', each followed by a 'Search' button.

3. Parents matching the search criteria will be displayed at the bottom of the page:

The screenshot shows the search results section of the interface. It contains a table with the following data:

Name	National Insurance	Payroll Reference	Tax Band	Change Band
MR PARENT FIVE	MN677666A	12	Additional Rate	Edit
DR TEST THIRTY	NM767777A	367287	Additional Rate	Edit

4. Click the 'Edit' link next to the relevant parent. A list of tax bands will be displayed in the dropdown list:

The screenshot shows the search results section with a dropdown menu open for the 'Higher Rate' tax band. The dropdown menu lists the following options: 'Higher Rate', 'Basic Rate', 'Higher Rate', 'Additional Rate', 'Protected Rights', and 'Personal Allowance'. The 'Update Cancel' link is also visible in the 'Change Band' column.

Name	National Insurance	Payroll Reference	Tax Band	Change Band
MR PARENT FIVE	MN677666A	12	Higher Rate	Update Cancel
DR TEST THIRTY	NM767777A	367287	Higher Rate	Edit

5. Click 'Update' to confirm the change or 'Cancel' to close the edit function.

Ordering backdated vouchers

If a parent wishes to add any backdated vouchers to the order, follow the process below.

1. Navigate to the 'Payroll Schedule Details' screen via the 'Orders' tab.
2. Select 'Backdated orders'.

850000126 SCHEME 1 Log Out

TEST MODE
Payroll Schedule Details

Scheme ID: 850000126 Scheme name: SCHEME 1
Order ID: 000000011 Payroll date: 08/04/2011

Filter Options

Category New Increased Decreased No Change Cancelled/Expired Excluded
Payroll ID
NI Number Apply

Backdated orders Add participant

Parent Name	Payroll ID	NI Number	Voucher Type	Amount	Backdated Amount	Status
PARENT FOUR	4	AB000165A	e-Voucher	£55.00	£0.00	Included Auto Exclude Amend
PARENT ONE	1	AB000161A	Paper	£0.00	£0.00	Excluded CVS Include Amend
PARENT THREE	3	AB000164A	e-Voucher	£75.00	£0.00	Included Auto Exclude Amend
PARENT TWO	2	AB000163A	Redeem Direct	£55.00	£0.00	Included Auto Exclude Amend

Participants: 3 Voucher Value: £185.00

Back Download as PDF Download as CSV

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3. Search for the parent using one of the fields provided, and then click 'Search'.
4. When you have found the parent for whom you intend to add backdated vouchers, click 'Select' next to their name.

TEST MODE
Add Backdated Order - Step 1 of 4

Select Parent Order Details Confirm Details Finish

Search Criteria

Unique Search
Employee ID: Search

Advanced Search
Name:
Payroll Ref:
NI Number:
Email Address:
Postcode: Search

Search Results

Name	Payroll Ref	NI Number	Postcode	Status
MR PARENT ONE	1	AB000161A	WS13 BSX	Live Select

Cancel

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- On the next screen, enter the value of backdated vouchers you wish to add. This must not exceed the total value to which the parent is entitled.
- Click 'Next'.

080000076 SCHEME 1 Log Out

TEST MODE
Add Backdated Order - Step 2 of 4

Select Parent > Order Details > Confirm Details > Finish

Employee Details

Employee ID: 080000340
Employee Name: MR PARENT ONE
NI Number: AB000161A
Payroll Ref: 1
Email Address: PARENTONE@TEST.CO.UK

Backdated Vouchers:

Non taxable voucher value taken under scheme 080000076 in current tax year. £0.00
Non taxable voucher value available as backdated vouchers, for the current tax year. £385.00
Please enter the backdated voucher value (£) you wish to order.

Cancel Back Next

Having problems? [Click here for help!](#)

- You will then be asked to confirm the value of backdated vouchers you have entered. Ensure that the value is correct, and then click 'Confirm', then 'Finish'.
- You will then be able to see the backdated amount in the on-screen summary, as below, and it will also be detailed on the payroll schedule.

080000113 SCHEME 2 Log Out

TEST MODE
Payroll Schedule Details

Scheme ID: 080000113 Scheme name: SCHEME 2
Order ID: 000000081 Payroll date: 27/05/2011

Filter Options

Category: New Increased Decreased No Change Cancelled/Expired Excluded
Payroll ID:
NI Number:

Apply

Backdated orders Add participant

Parent Name	Payroll ID	NI Number	Voucher Type	Amount	Backdated Amount	Status
PARENT FIVE	5	AB000445A	e-Voucher	£240.00	£3.00	Included CVS Exclude Amend
PARENT FOUR	4	AB000444A	e-Voucher	£200.00	£0.00	Included CVS Exclude Amend
PARENT ONE	1	AB000441A	Paper	£243.00	£0.00	Included CVS Exclude Amend
PARENT SIX	6	AB000446A	e-Voucher	£243.00	£0.00	Included CVS Exclude Amend
PARENT THREE	3	AB000443A	Redeem Direct	£243.00	£0.00	Included CVS Exclude Amend
PARENT TWO	2	AB000442A	Paper	£240.00	£0.00	Included CVS Exclude Amend

Participants: 6 Voucher Value: £1,412.00

Download as PDF Download as CSV

Agreeing an order

If you do not need to make any amendments, or have made all the required amendments, you will need to agree your order before you can download your invoice.

Please note once an order has been agreed no amendments can be made until your next order.

1. Navigate to the 'View Payroll' Screen by selecting the 'Orders' tab.

Scheme ID: 8500000126 Scheme name: SCHEME 1
Order ID: 0000000011

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: EVERY FRIDAY
Payroll date: 08/04/2011
Assumed agreed date: N/A
Order status: Open **Agreed**

Order Details

Order number: 0000000011
Number of parents: 3 **View / Amend**

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	0	0.00	0.00
Parents voucher value increased	0	0.00	0.00
Parents voucher value decreased	0	0.00	0.00
No change to parents voucher value	3	0.00	185.00
Cancelled / expired parents orders	1	-55.00	0.00
Excluded parents	0	0.00	0.00
Total	3	-55.00	185.00

Please refer to your Payroll Schedule for full details of individual orders.

Download as PDF

2. Select the 'Agreed' button, and then confirm the pop up that appears. The order status will change to 'Awaiting Payment'.

Scheme ID: 8500000126 Scheme name: SCHEME 1
Order ID: 0000000011

Below is a summary of this payroll schedule.

Scheme-Payroll Details

Payroll frequency: EVERY FRIDAY
Payroll date: 08/04/2011
Assumed agreed date: 01/04/2011
Order status: **Schedule Agreed / Awaiting Payment**
Invoice status: Awaiting payment

Order Details

Order number: 0000000011
Number of parents: 3 **View / Amend**

Pay Period Breakdown

The table below compares your order(s) in the current pay period against orders from your previous payroll period.

Category	No of Employees	Differences (£)	Total Amount (£)
New parents	0	0.00	0.00
Parents voucher value increased	0	0.00	0.00
Parents voucher value decreased	0	0.00	0.00
No change to parents voucher value	3	0.00	185.00
Cancelled / expired parents orders	1	-55.00	0.00
Excluded parents	0	0.00	0.00
Total	3	-55.00	185.00

Please refer to your Payroll Schedule for full details of individual orders.

Download as PDF

Reference Guides

Setting up additional users

You may wish to add additional users to your account, especially if you are not going to be directly administering the account yourself.

1. Log in to your account.
2. In the 'Contacts' tab at top of screen, select 'Additional'.
3. You will see all of your current additional users, if any. Select 'Add'.
4. The 'New Additional User' screen will appear and you will be prompted to enter the additional user's name, email address, and access level.
5. Once this information is entered, click 'Next'.
6. A confirmation screen will appear. Check the details, click 'Confirm', and then 'Finish'.
7. You will return to the list of additional users, which should now include the new additional user.
8. Two emails will then be sent to the new additional user's email address, one containing their User ID, and the other their password.
9. The first time the new user logs on, they will be prompted to change their password and set some security questions. These may be required to verify the user's identity in the future.

Resetting a password for an additional user

If an additional user needs to reset their password, they need to follow the steps below.

1. In the 'Contacts' tab at top of screen, select 'Additional'.
2. Find the contact you require. Click 'Select' alongside their name.
3. Select 'Contact Activity' tab.
4. Click 'Reset password'.
5. This will automatically generate a new password, which is then sent to the additional user's email address.

Forgotten password

If you have forgotten your password and are unable to log in, please follow the steps below.

1. Click on 'Forgotten Password' on the EOL log in screen.
2. Enter your User ID and click 'Next'.
3. Answer the security questions you set when you first signed up and then click 'Next'.
4. Enter your new password or security questions and click 'Next'.
5. Your security details have now been changed.

Locking and unlocking additional users

You may wish to lock an additional user's account if they are on long term sick or maternity leave and will be returning to their post.

1. Log in to your online account.
2. In the 'Contacts' tab at top of screen, select 'Additional'.
3. Click 'Select' alongside the additional user's name which needs to be locked.
4. Select 'Contact Activity' tab.
5. Select 'Lock'.
6. This will automatically disable access to the online account for this user.
7. If the user tries to log in, they will not be allowed, and instead be directed to speak to their Primary Contact to discuss the status of their account.
8. To unlock the user, repeat the process. You will find the 'Lock' button replaced by 'Unlock'.

Deleting an additional user

You may wish to delete a user if they no longer work for your company. Please note that once a user has been deleted, you are not able to reinstate them. If you wish to do this, you will have to create a new user.

1. Log into your online account.
2. In the 'Contacts' tab at top of the screen, select 'Additional'.
3. Click 'Select' alongside the name of the contact to be deleted.
4. Select 'Contact Details' tab.
5. Click 'Delete'.
6. The next screen to appear will be the 'Confirm Removal' screen. Check that this is the correct user, then click 'Confirm' and 'Finish'. You will then be returned to the list of remaining additional users.
7. You can see which users have been deleted by checking the 'Inactive' tab on the list of users.

Changing your password

1. Select 'Security Details' from your home screen.
2. Enter your new password and security questions and click 'Next'.
3. Your security details have now been changed.

Viewing a payroll schedule online

1. Log into your online account.
2. Click on the 'Orders' tab.
3. Click 'View' in the payroll schedule column of the order which you wish to view.
4. You have now reached the payroll schedule screen.

Printing payroll schedules and invoices

To print a payroll schedule, once you have been notified that it is ready for review:

1. Navigate to the payroll schedule screen.
2. Click 'View/Amend'.
3. You then have a choice. You can either click 'Download as PDF' to download a printable summary and parent-by-parent breakdown of your order, or you can click 'Download as CSV' to download an Excel file containing the order information.

To print your invoices

1. Agree your order, or wait for it to be agreed (see below).
2. Click the 'Orders' tab at the top of your screen.
3. Click 'View' in the invoice column, next to the order whose invoices you require.
4. Click 'Download as PDF'.
5. You will be prompted to enter a purchase order number – if none is required leave this box blank. Click 'Confirm'.
6. You will then download a printable PDF of your invoice.
7. If you have a split invoice, you can switch between your voucher and service invoice via the relevant tabs towards the top of the screen.

Adding a parent to an open order

Follow the below steps to add a parent onto your order.

1. Navigate to the payroll schedule screen.
2. Click 'View/Amend'.
3. Click 'Add Participant'.
4. Search for the parent you wish to add onto the order, and select 'Add To Order' next to their name.
5. Review the value of voucher they are ordering and then click confirm.
6. The parent will then be listed on the payroll schedule.

Amending an open order

1. Navigate to the payroll schedule screen of the order you wish to amend.
2. Click 'View/Amend'.
3. You will then see an online list of all the parents included on the order. They are listed in alphabetical order by first name.
4. Navigate to the parent that you wish to amend, and click 'Amend' next to their name.
5. In the pop up box, enter the new voucher amount, a reason for the amendment, and click 'Apply'.
6. If you wish to remove a parent from an order altogether, click 'Exclude' next to the parents name, instead of 'Amend'. Please note that this will remove them from this order only, and they will be back on the next order. To remove them from ongoing

orders please email transactionprocessing@computershare.co.uk who will cancel the parent's ongoing order.

7. Repeat this process for all the parents that need amending.
8. Once the amendments are complete, you can agree the order.

Approving tax bands

Any new parents who join your scheme after 5 April 2011 will require their tax band to be approved.

1. Navigate to the payroll schedule screen.
2. Click 'View/Amend' under tax band approval
3. Parents can be selected for approval one at a time by checking the individual checkboxes.
4. Where the unapproved parents span more than one page, you can move forward and back.
5. You also have the option to 'Select All' this allows you to select all parents on the page for approval. This does not select Parents on any other page.
6. Once all parents have been approved click 'Confirm'
7. Any parents unapproved on your open order will prevent you being able to agree your order.
8. In addition, if you allow your payroll cut-off date to elapse, your order will be agreed automatically and approve all unapproved tax bands. You must ensure all tax bands are correct if you are allowing your order to automatically agree.

Edit tax band

1. Navigate to the payroll schedule screen.
2. Click 'View/Amend' under tax band Approval
3. Parents can be selected for approval one at a time by checking the individual checkboxes.
4. Click 'Edit' and choose a new tax band from the drop down list and click 'Change' to update the tax band.
5. Once all changes have been made click 'Confirm'

Updating a previously approved tax band

1. Navigate to the payroll schedule screen.
2. Click 'View/Amend' under tax band Approval.
3. Click 'Previously Approved' tab.
4. Search for parent one or more of the search criteria can be used to locate a parent or parents with a previously approved tax band.
5. Click the 'Edit' link next to the relevant Parent.
6. Choose new tax band from the drop down box.
7. Click 'Update' to confirm the change or 'Cancel' to close the edit function.

Ordering backdated vouchers

If a parent wishes to add any backdated vouchers to the order, follow the process below.

1. Select 'Backdated orders' on the payroll schedule details screen.
2. Search for the parent using the fields provided.
3. Locate the parent for whom you intend to add backdated vouchers. Click 'Select' next to their name.
4. On the next screen, enter the value of backdated vouchers you wish to add. This must not exceed the total value to which the parent is entitled.
5. Click 'Confirm'.
6. You will then be asked to confirm the value of backdated vouchers you have entered.
7. Ensure that the value is correct, and then click 'Confirm'.
8. The backdated vouchers have now been added. Click 'Finish' to return to the payroll schedule screen.
9. You will then be able to see the backdated amount in the on-screen summary, and it will also be detailed on the payroll schedule.

Agreeing an order

If you do not need to make any amendments, or have made all the required amendments, you will need to agree your order before you can download your invoice.

1. Navigate to the payroll schedule screen.
2. Select the 'Agreed' button.
3. **Please note, this step cannot be undone, so please ensure that all required amendments have been made before you do this.**
4. In addition, if you allow your payroll cut-off date to elapse, your order will be agreed automatically.

Questions?

If you have any questions or feedback on our Employer Online service, please contact your usual Account Management team or:

EOL@computersharevoucherservices.co.uk.

Tel: 0845 002 1111