



Payroll Giving Platform

User Guide

 Employer

Signing up as an Employer

4 steps to impact

Start creating amazing change in the world by signing up to GoodPAYE in 4 simple steps.



Step 1

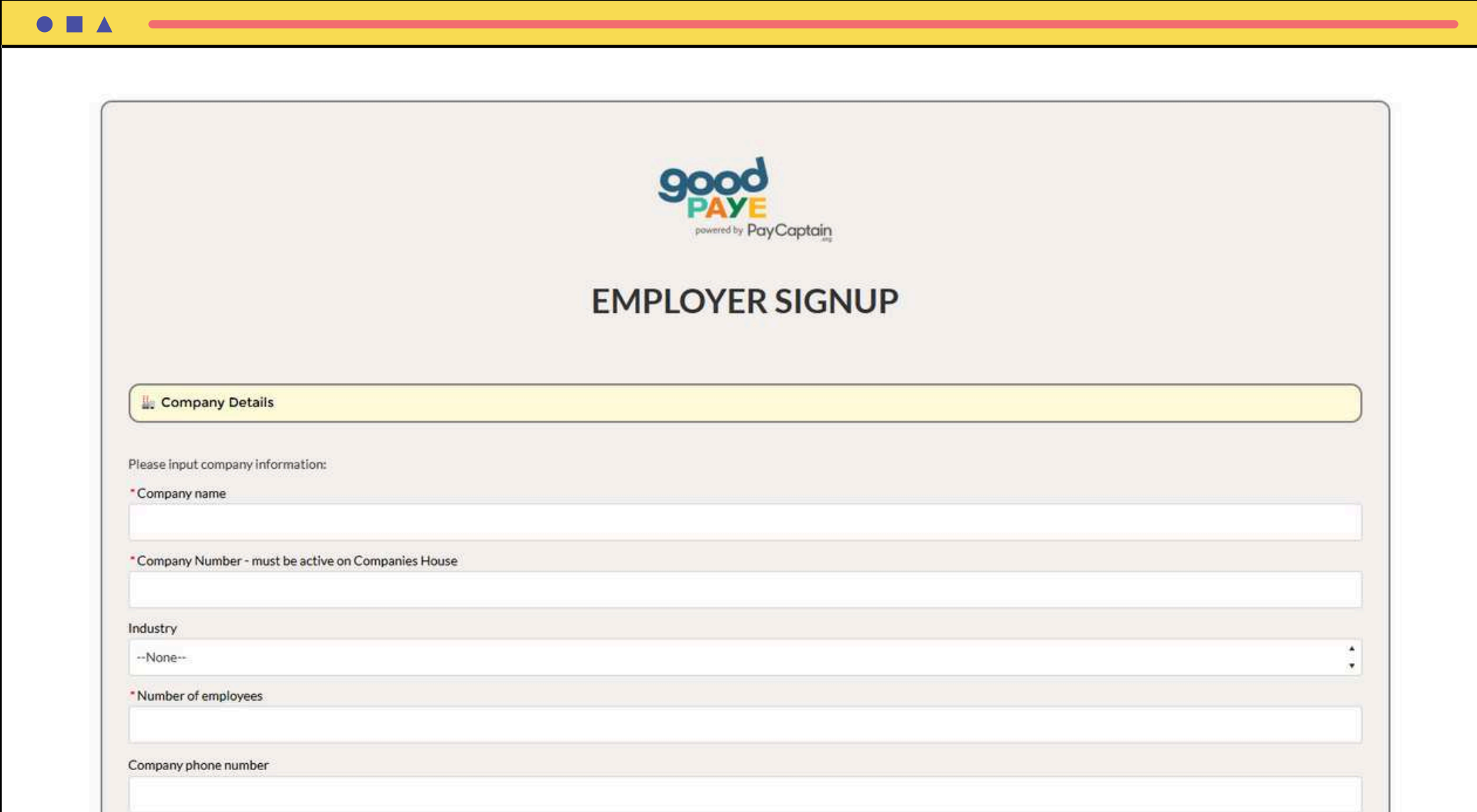
Visit the sign-up page

Visit: <https://app.goodpaye.com/s/new-employer>

Step 2

Fill in the form

1. Fill in your Company details.
2. Fill in your Payroll details.
 - This will include your pay frequency and PAYE reference. This is where you will also specify whether you will be covering the admin fee on behalf of your employees.
3. **Agree** to the Terms & Conditions.
4. Click **Next**.



The screenshot shows a web browser window displaying the 'EMPLOYER SIGNUP' page for 'good PAYE powered by PayCaptain'. The page features a 'Company Details' section with the following fields:

- Company name**: A text input field with an asterisk indicating it is required.
- Company Number - must be active on Companies House**: A text input field with an asterisk indicating it is required.
- Industry**: A dropdown menu currently showing '--None--'.
- Number of employees**: A text input field with an asterisk indicating it is required.
- Company phone number**: A text input field.

The browser's address bar is visible at the top, and the page is decorated with orange plus signs and a teal play button icon in the bottom right corner.

Step 3

Create contacts

1. Add your main contact details. These are the details of the person who will be administering the scheme.
 - **First name & last name**
 - **Email address**
 - **Contact Type** (Payroll, Finance, HR or CSR)
2. Tick if this is the primary contact.
 - a. Note, a contact must be marked as primary in order to receive email notifications.
 - b. Only Finance contacts will receive the payment request emails.
3. Click **Add** to include additional contacts.
4. Click **Next**.

Step 4

You're Live!

You'll now land on your confirmation page which will display your company donation link.

The contacts you created in Step 3 will receive their welcome emails prompting them to confirm their account. You'll receive yours too, so make sure to follow the link in your welcome email to create your password. Once created, you'll then land on your new dashboard!



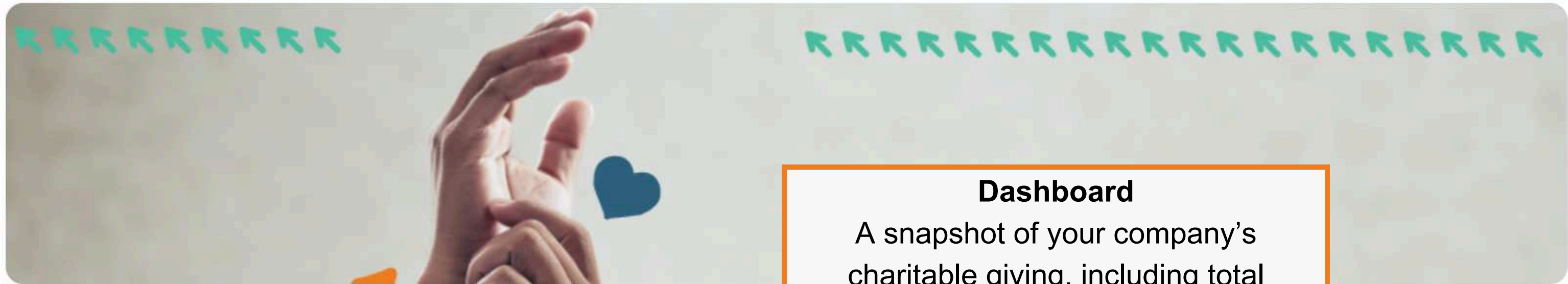
 Employer

The Employer Dashboard

Total control and absolute transparency

Track your charitable impact, download payroll reports, and transfer your deductions.





Dashboard

A snapshot of your company's charitable giving, including total donations and number of charities you are supporting.

Dashboard

72

GoodPayers



£4,580

donated so far



91

charities supported



Employees

View a full list of all employees that are currently donating.



Dashboard

72

GoodPayers



£4,580

donated so far



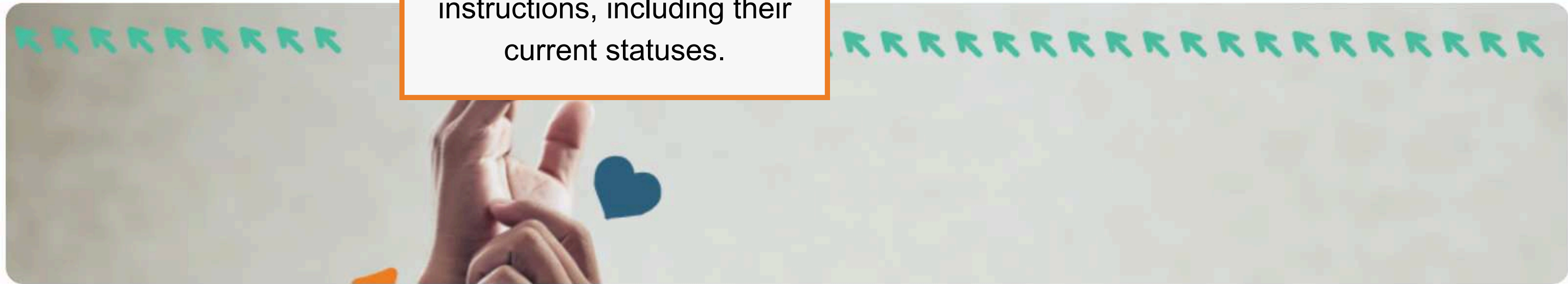
91

charities supported



Donation Instructions

Use this tab to view all your employees Payroll Giving instructions, including their current statuses.



Dashboard

72

GoodPayers



£4,580

donated so far



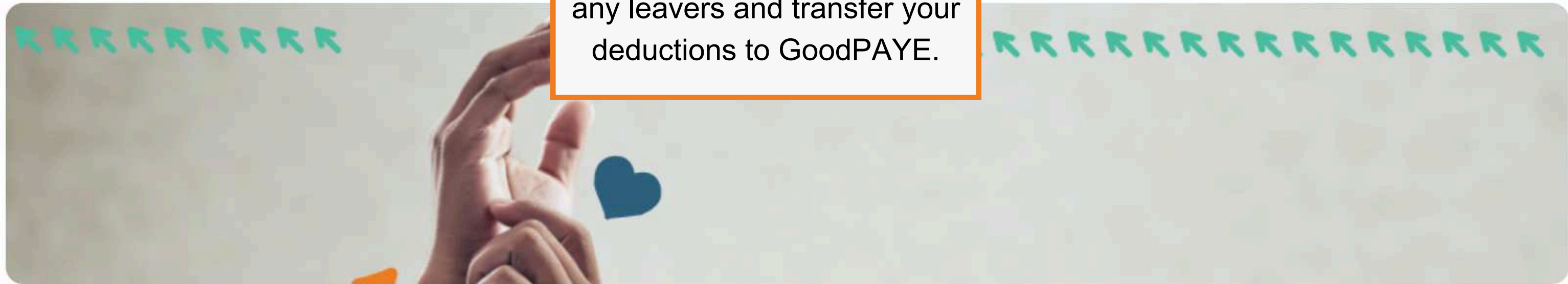
91

charities supported



Pay Periods

This is where you'll download your deduction reports, mark any leavers and transfer your deductions to GoodPAYE.



Dashboard

72

GoodPayers



£4,580

donated so far



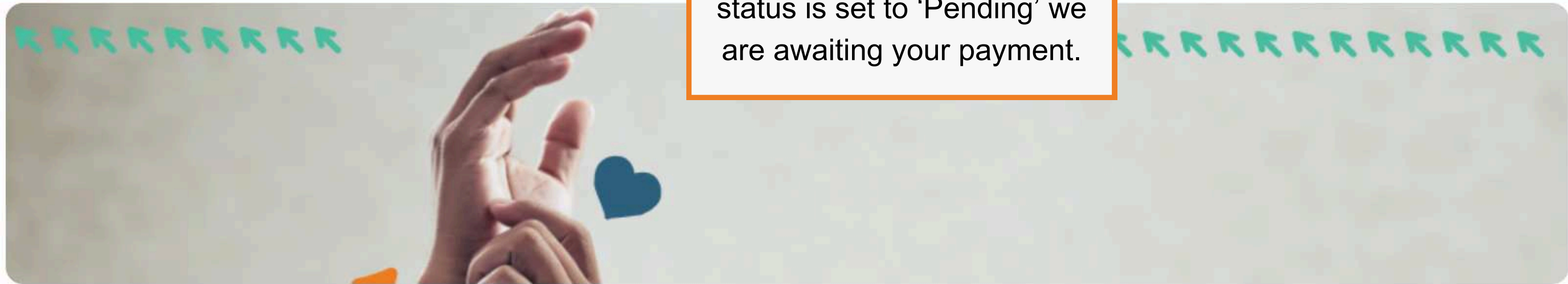
91

charities supported



Payments

View all historic payments including their statuses. If status is set to 'Pending' we are awaiting your payment.



Dashboard

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£4,580

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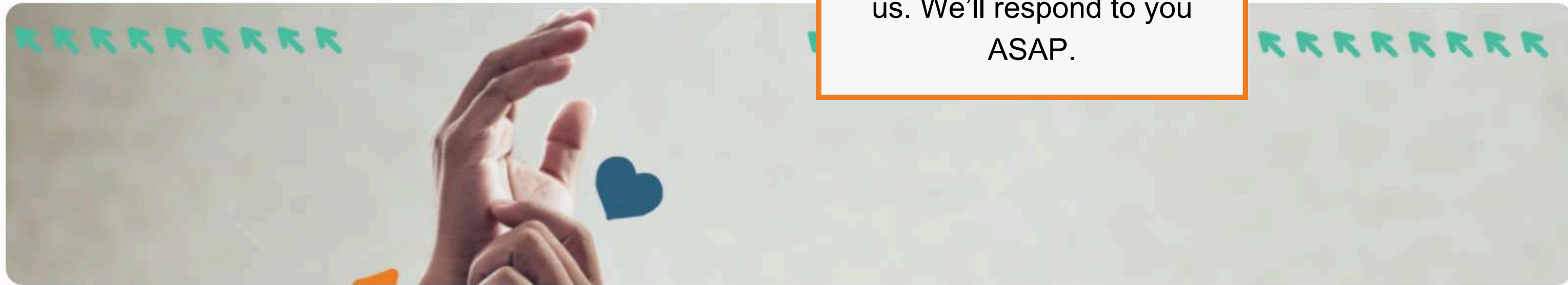
91

charities supported



Support

Need support or have a question? Raise a ticket or call us. We'll respond to you ASAP.



Dashboard

72

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£4,580

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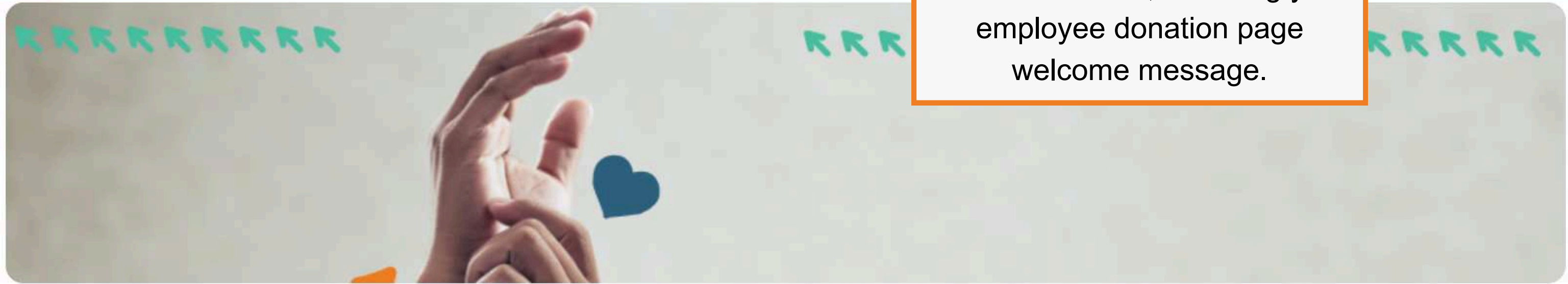
91

charities supported



Setup

Here are your account details.
You can edit your company information here, including your employee donation page welcome message.



Dashboard

72

GoodPayers



£4,580

donated so far



91

charities supported



The Payroll Process

Ensuring deductions are made and charities paid

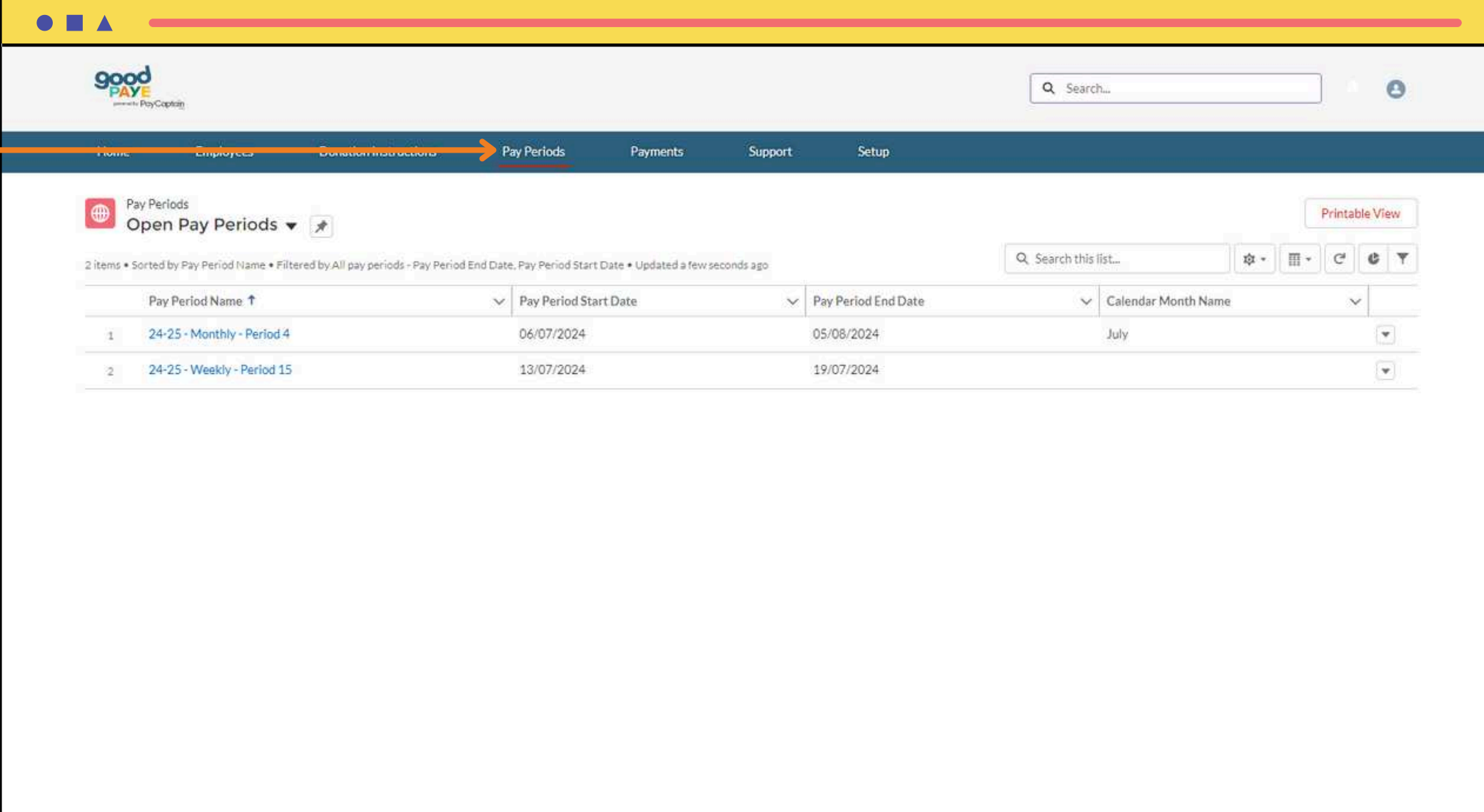
Automating the process to ensure complete data accuracy, timely payments, and quick disbursements to charities.



Step 1

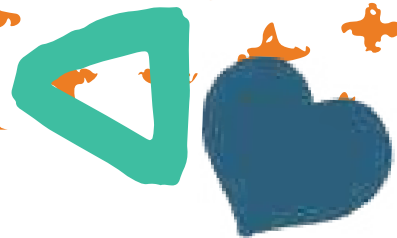
Access the current Pay Period

1. **Click** 'Pay Periods' in the top menu.
2. **Select** the open Pay Period. Depending on your set-up, you will either see Monthly, Weekly, or both.



The screenshot shows the GoodPAYE web application interface. The top navigation bar includes 'Home', 'Employees', 'Solution Instructions', 'Pay Periods', 'Payments', 'Support', and 'Setup'. The 'Pay Periods' menu item is highlighted with an orange arrow. Below the navigation bar, the 'Pay Periods' section is displayed, showing 'Open Pay Periods' and a table of 2 items. The table columns are 'Pay Period Name', 'Pay Period Start Date', 'Pay Period End Date', and 'Calendar Month Name'. The first row shows '24-25 - Monthly - Period 4' with start date '06/07/2024' and end date '05/08/2024' for the month of 'July'. The second row shows '24-25 - Weekly - Period 15' with start date '13/07/2024' and end date '19/07/2024'.

	Pay Period Name ↑	Pay Period Start Date	Pay Period End Date	Calendar Month Name
1	24-25 - Monthly - Period 4	06/07/2024	05/08/2024	July
2	24-25 - Weekly - Period 15	13/07/2024	19/07/2024	



Step 1

Access the current Pay Period

1. **Click** 'Pay Periods' in the top menu.
2. **Select** the open Pay Period. Depending on your set-up, you will either see Monthly, Weekly, or both.



What is a Pay Period?

Whichever date your employees begin donating, they are assigned to the current month's pay period (for example, Pay Period 1 corresponds to April). **These pay periods are based on calendar months and are not related to your individual company pay periods.**

All donations received during the current month are automatically added to that month's pay period. You then review and confirm these donations on your payroll cut-off date, which then **closes** that month's pay period.

Once the current month's pay period is closed, any new donations will be added to the next month's pay period. Each month's pay period remains open until you confirm and close it, ensuring all donations are correctly allocated.



Step 1

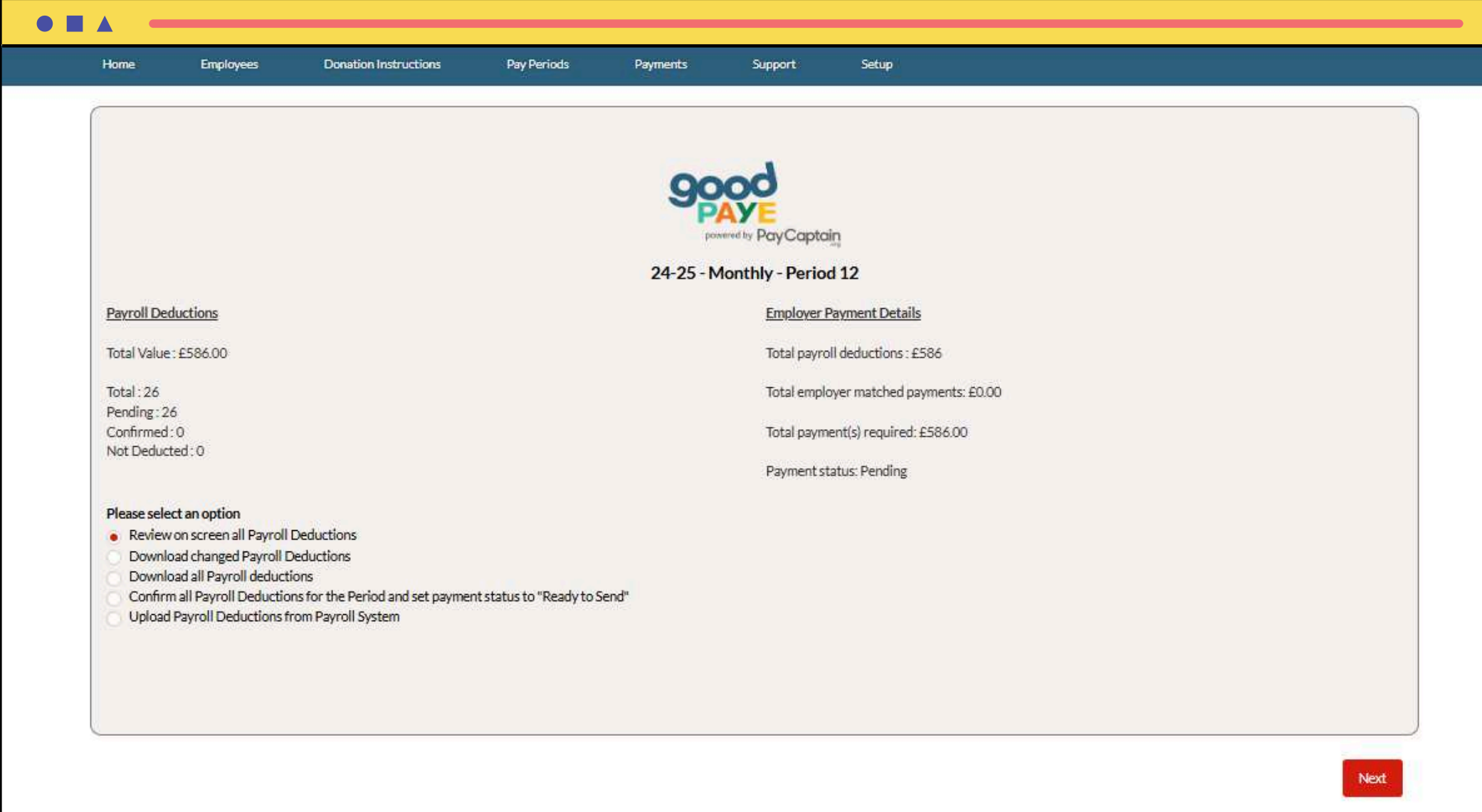
Access the current Pay Period

1. Click 'Pay Periods' in the top menu.
2. Select the open Pay Period. Depending on your set-up, you will either see Monthly, Weekly, or both.

Step 2

View Payroll Deductions

1. The total value of your deductions, and therefore the amount to deduct from payroll, is displayed under 'Payroll Deductions'
2. The total amount to be transferred to GoodPAYE is displayed under 'Employer Payment Details'

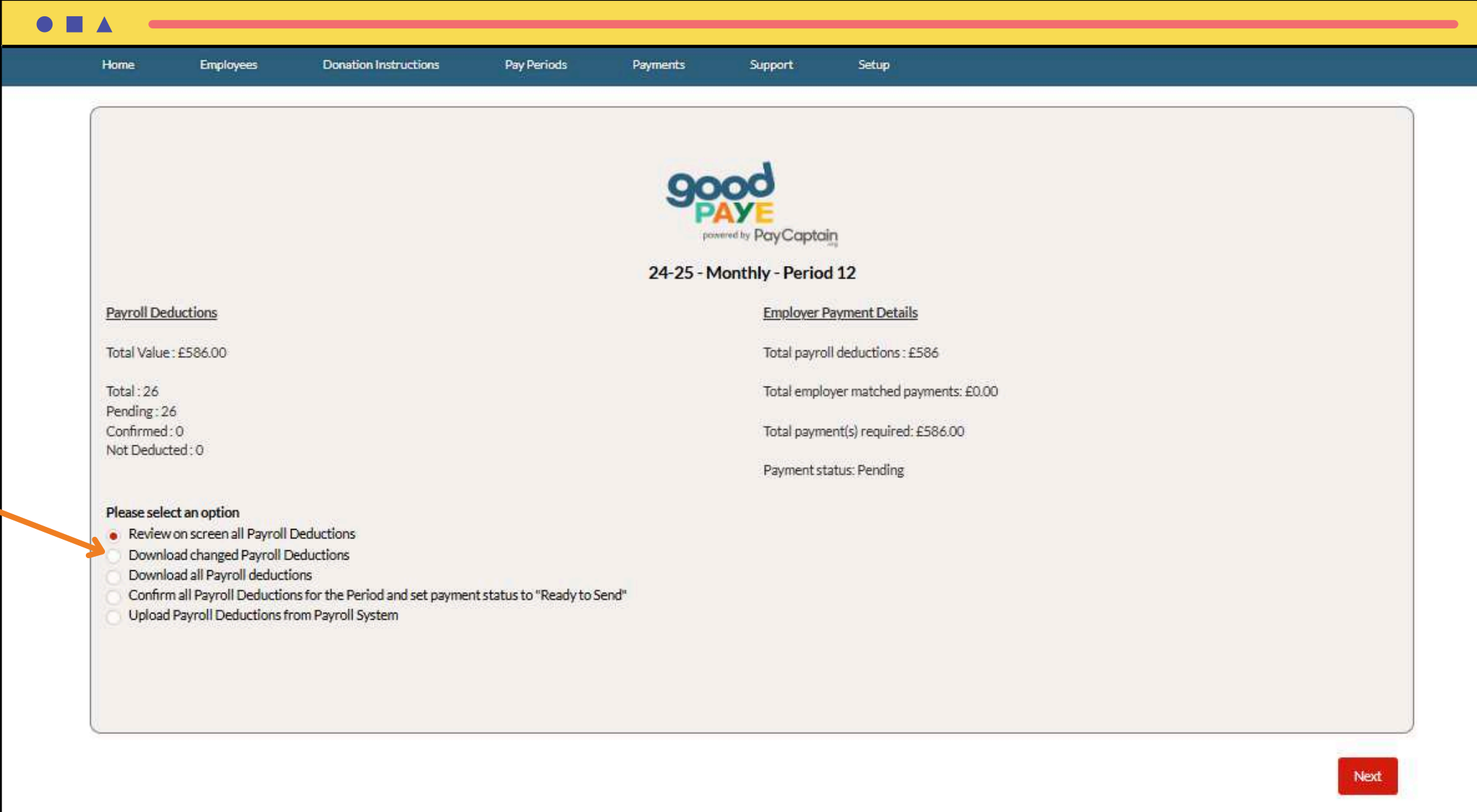


The screenshot displays the GoodPAYE web interface. At the top, there is a navigation menu with links for Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area features the GoodPAYE logo (powered by PayCaptain) and the current pay period: 24-25 - Monthly - Period 12. The interface is divided into two columns: 'Payroll Deductions' and 'Employer Payment Details'. The 'Payroll Deductions' section shows a total value of £586.00, with 26 total items, 26 pending, 0 confirmed, and 0 not deducted. The 'Employer Payment Details' section shows total payroll deductions of £586, total employer matched payments of £0.00, and total payment(s) required of £586.00. The payment status is 'Pending'. Below these sections, there is a 'Please select an option' section with five radio button options: 'Review on screen all Payroll Deductions' (selected), 'Download changed Payroll Deductions', 'Download all Payroll deductions', 'Confirm all Payroll Deductions for the Period and set payment status to "Ready to Send"', and 'Upload Payroll Deductions from Payroll System'. A red 'Next' button is located at the bottom right of the main content area.

Step 3

Download your report

1. **Download** the necessary report
 - **Changed Payroll deductions:** Shows **only** changes to payroll giving donations (e.g., increases, decreases, pauses or stops).



The screenshot shows the Good Paye web interface. At the top, there is a navigation bar with links: Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area displays the Good Paye logo (powered by PayCaptain) and the period "24-25 - Monthly - Period 12".

Under the heading "Payroll Deductions", the following information is shown:

- Total Value : £586.00
- Total : 26
- Pending : 26
- Confirmed : 0
- Not Deducted : 0

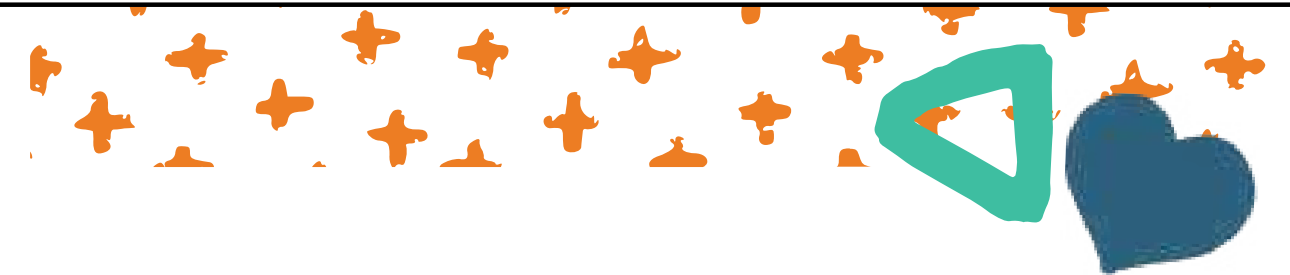
Under the heading "Employer Payment Details", the following information is shown:

- Total payroll deductions : £586
- Total employer matched payments: £0.00
- Total payment(s) required: £586.00
- Payment status: Pending

Below this information, there is a section titled "Please select an option" with five radio button choices:

- Review on screen all Payroll Deductions
- Download changed Payroll Deductions
- Download all Payroll deductions
- Confirm all Payroll Deductions for the Period and set payment status to "Ready to Send"
- Upload Payroll Deductions from Payroll System

A red "Next" button is located at the bottom right of the interface.

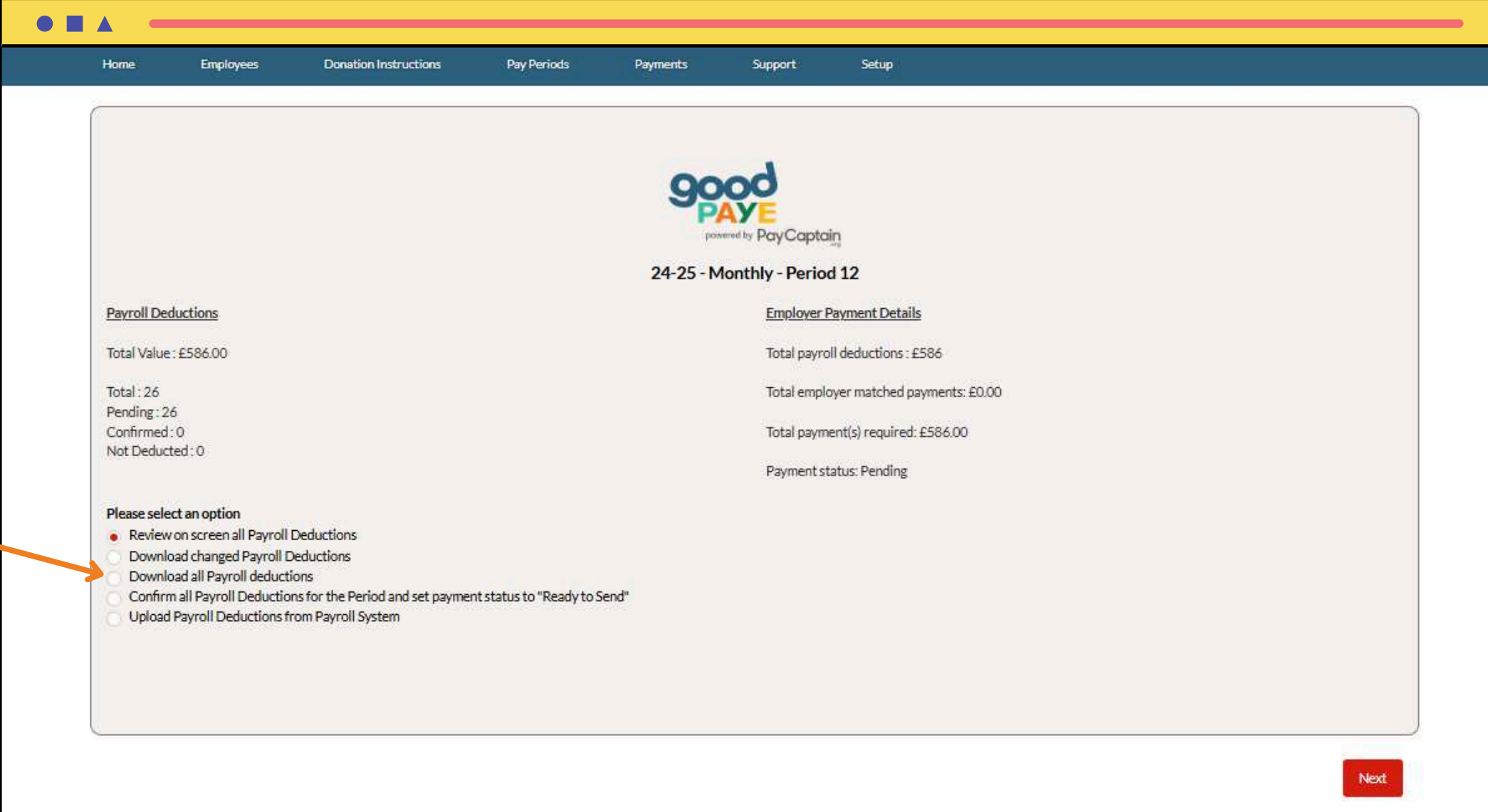


Step 3

Download your report

1. Download the necessary report

- **Changed Payroll deductions:** Shows **only** changes to payroll giving donations (e.g., increases, decreases, pauses or stops).
- **All Payroll deductions:** Provides a complete list of all deductions.



The screenshot shows the Good Paye web interface. At the top, there is a navigation bar with links: Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area displays the Good Paye logo (powered by PayCaptain) and the period "24-25 - Monthly - Period 12".

Under "Payroll Deductions", the following information is shown:

- Total Value : £586.00
- Total : 26
- Pending : 26
- Confirmed : 0
- Not Deducted : 0

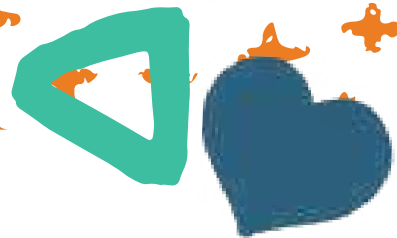
Under "Employer Payment Details", the following information is shown:

- Total payroll deductions : £586
- Total employer matched payments: £0.00
- Total payment(s) required: £586.00
- Payment status: Pending

A section titled "Please select an option" contains five radio button choices:

- Review on screen all Payroll Deductions
- Download changed Payroll Deductions
- Download all Payroll deductions
- Confirm all Payroll Deductions for the Period and set payment status to "Ready to Send"
- Upload Payroll Deductions from Payroll System

A red "Next" button is located at the bottom right of the interface.



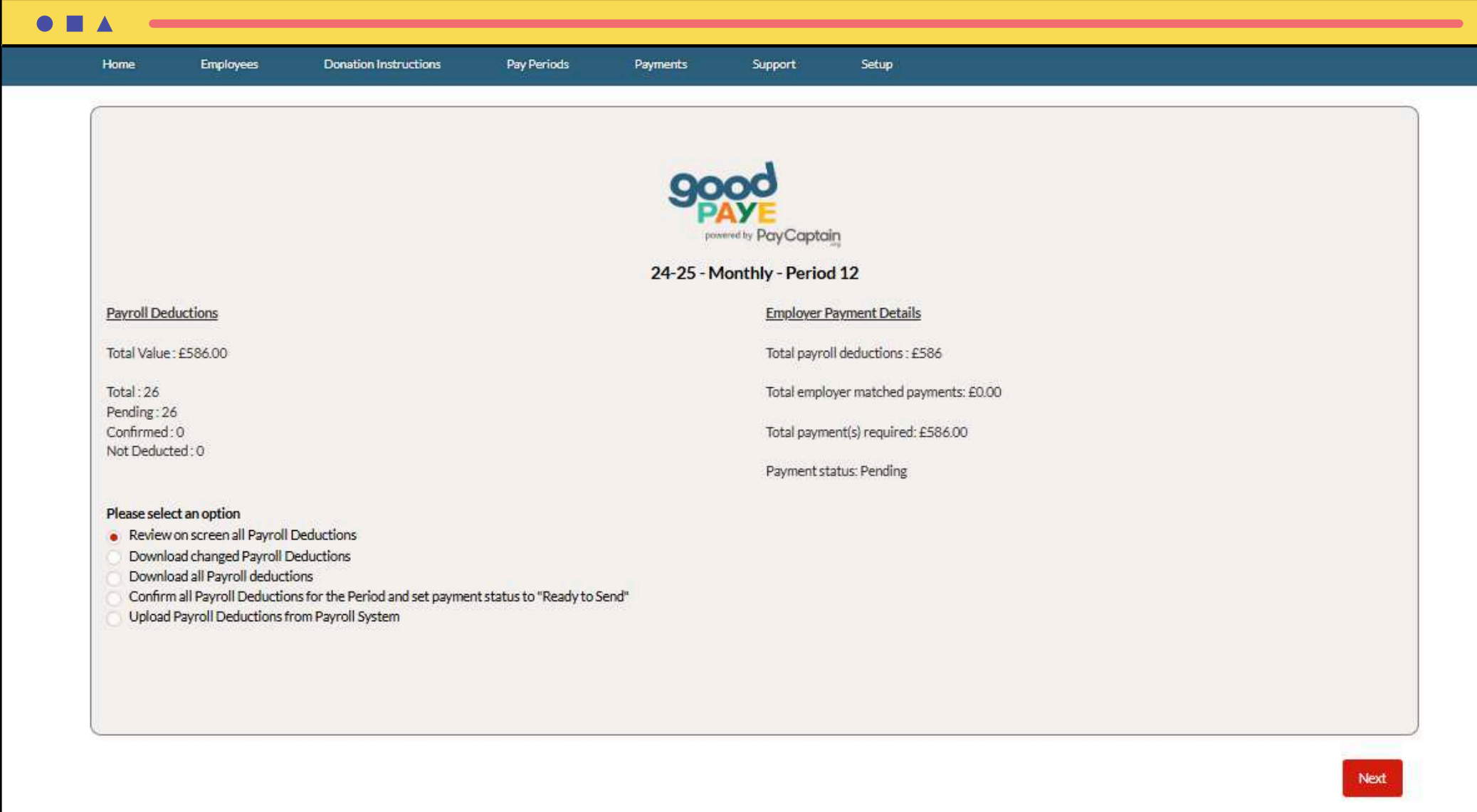
Step 3

Download your report

1. **Download** the necessary report
 - **Changed Payroll deductions:** Shows **only** changes to payroll giving donations (e.g., increases, decreases, pauses or stops).
 - **All Payroll deductions:** Provides a complete list of all deductions.

What report do I need?

After the first month of using GoodPAYE, some employers prefer to set up Payroll Giving donations as regular deductions on their payroll software, therefore only needing a report which displays any changes or additional donors. For others, the full report is always needed.

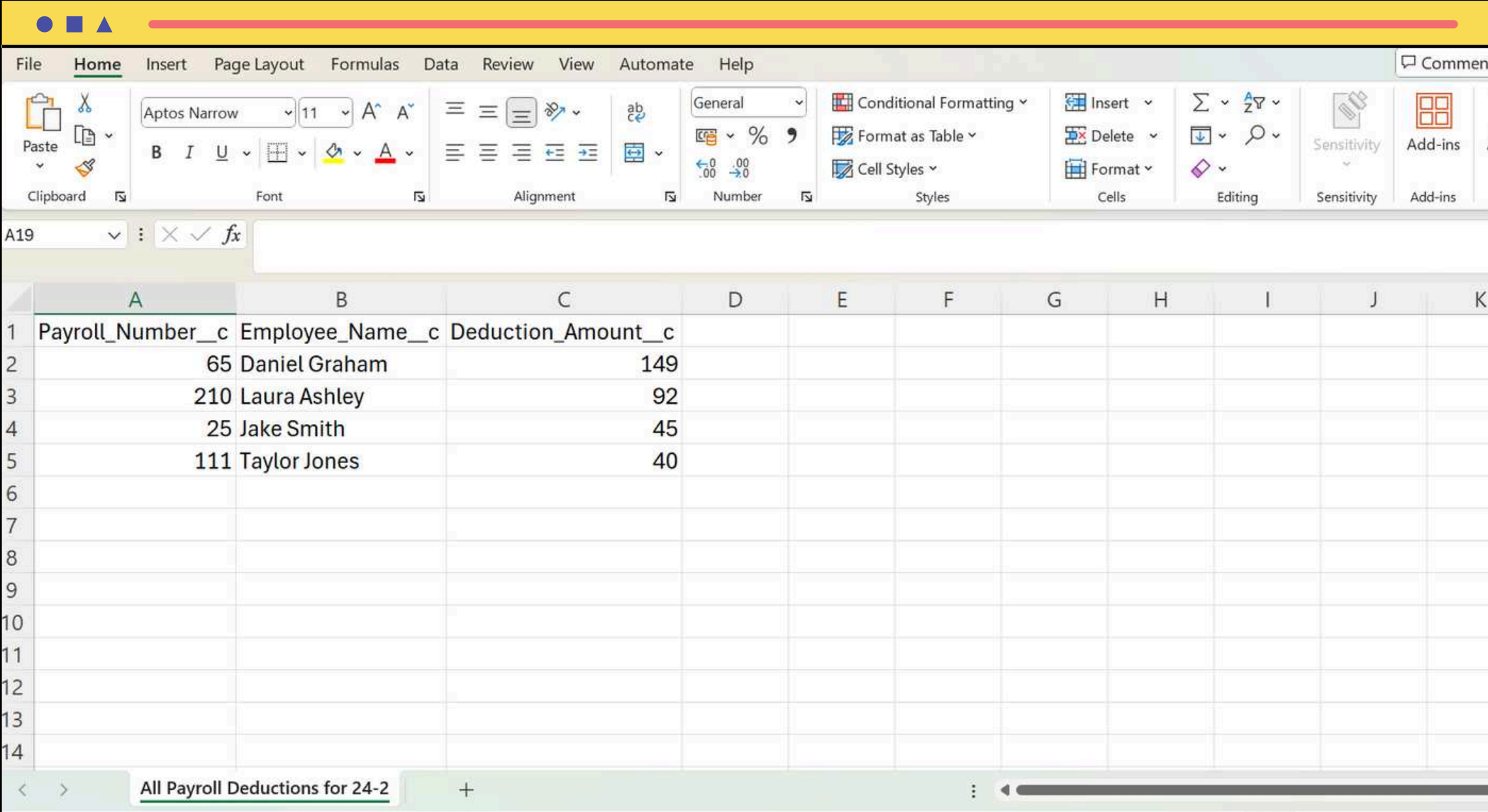


The screenshot shows the GoodPAYE web interface. At the top, there is a navigation menu with links for Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area displays the GoodPAYE logo (powered by PayCaptain) and the period 24-25 - Monthly - Period 12. Below this, there are two columns of information: Payroll Deductions and Employer Payment Details. The Payroll Deductions section shows a Total Value of £586.00, with a breakdown of Total: 26, Pending: 26, Confirmed: 0, and Not Deducted: 0. The Employer Payment Details section shows Total payroll deductions: £586, Total employer matched payments: £0.00, Total payment(s) required: £586.00, and Payment status: Pending. At the bottom, there is a section titled "Please select an option" with five radio button choices: "Review on screen all Payroll Deductions" (selected), "Download changed Payroll Deductions", "Download all Payroll deductions", "Confirm all Payroll Deductions for the Period and set payment status to 'Ready to Send'", and "Upload Payroll Deductions from Payroll System". A "Next" button is visible in the bottom right corner.

Step 3

Download your report

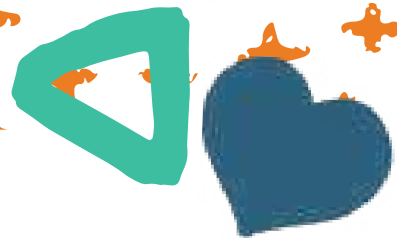
1. **Download** the necessary report
 - **Changed Payroll deductions:** Shows **only** changes to payroll giving donations (e.g., increases, decreases, pauses or stops).
 - **All Payroll deductions:** Provides a complete list of deductions.
2. **Select** the report to download and click **next**.
3. Use the downloaded .csv file to manually make deductions or upload the file into your payroll software.



The screenshot shows a Microsoft Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H	I	J	K
1	Payroll_Number_c	Employee_Name_c	Deduction_Amount_c								
2	65	Daniel Graham	149								
3	210	Laura Ashley	92								
4	25	Jake Smith	45								
5	111	Taylor Jones	40								
6											
7											
8											
9											
10											
11											
12											
13											
14											

The spreadsheet is titled "All Payroll Deductions for 24-2". The interface shows the Microsoft Excel ribbon with the "Home" tab selected. The font is "Aptos Narrow" and the size is "11". The spreadsheet is displayed in a window with a yellow title bar.



Step 4

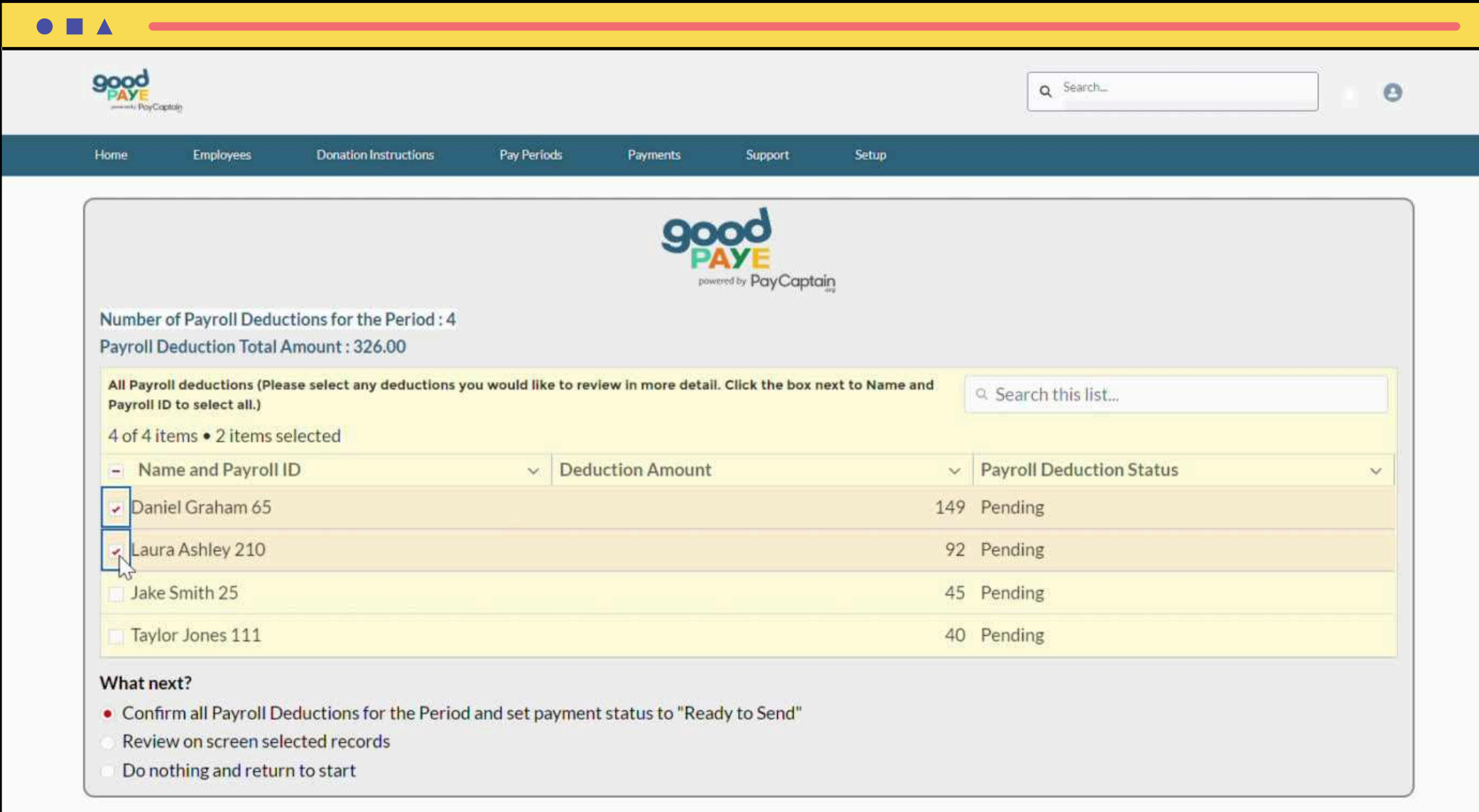
Mark any leavers

For any deductions you have not made (e.g., employees who have left or are on leave), you need to mark these on the platform.

1. **Click** 'Review on screen all Payroll Deductions'
2. **Select** the relevant employees that you wish to amend.
3. **Select** 'Review on screen selected records' and click **next**.
4. **Set** Payroll Deduction Status to 'not deducted' and provide the reason and click **next**.
5. Continue until all relevant employees have been updated and click **next**.

The Payroll Deductions will now show the updated amount amount and the number of employees not deducted.

N.B. You also have the option of uploading your Payroll Deduction file to the platform to process leavers automatically.



The screenshot shows the GoodPAYE platform interface. At the top, there is a search bar and a navigation menu with options: Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area displays the GoodPAYE logo and the text "powered by PayCaptain". Below this, it shows "Number of Payroll Deductions for the Period : 4" and "Payroll Deduction Total Amount : 326.00". A table lists all payroll deductions with columns for Name and Payroll ID, Deduction Amount, and Payroll Deduction Status. Two records are selected, indicated by checked checkboxes: Daniel Graham 65 (149 Pending) and Laura Ashley 210 (92 Pending). Below the table, there is a "What next?" section with three radio button options: "Confirm all Payroll Deductions for the Period and set payment status to 'Ready to Send'", "Review on screen selected records", and "Do nothing and return to start".

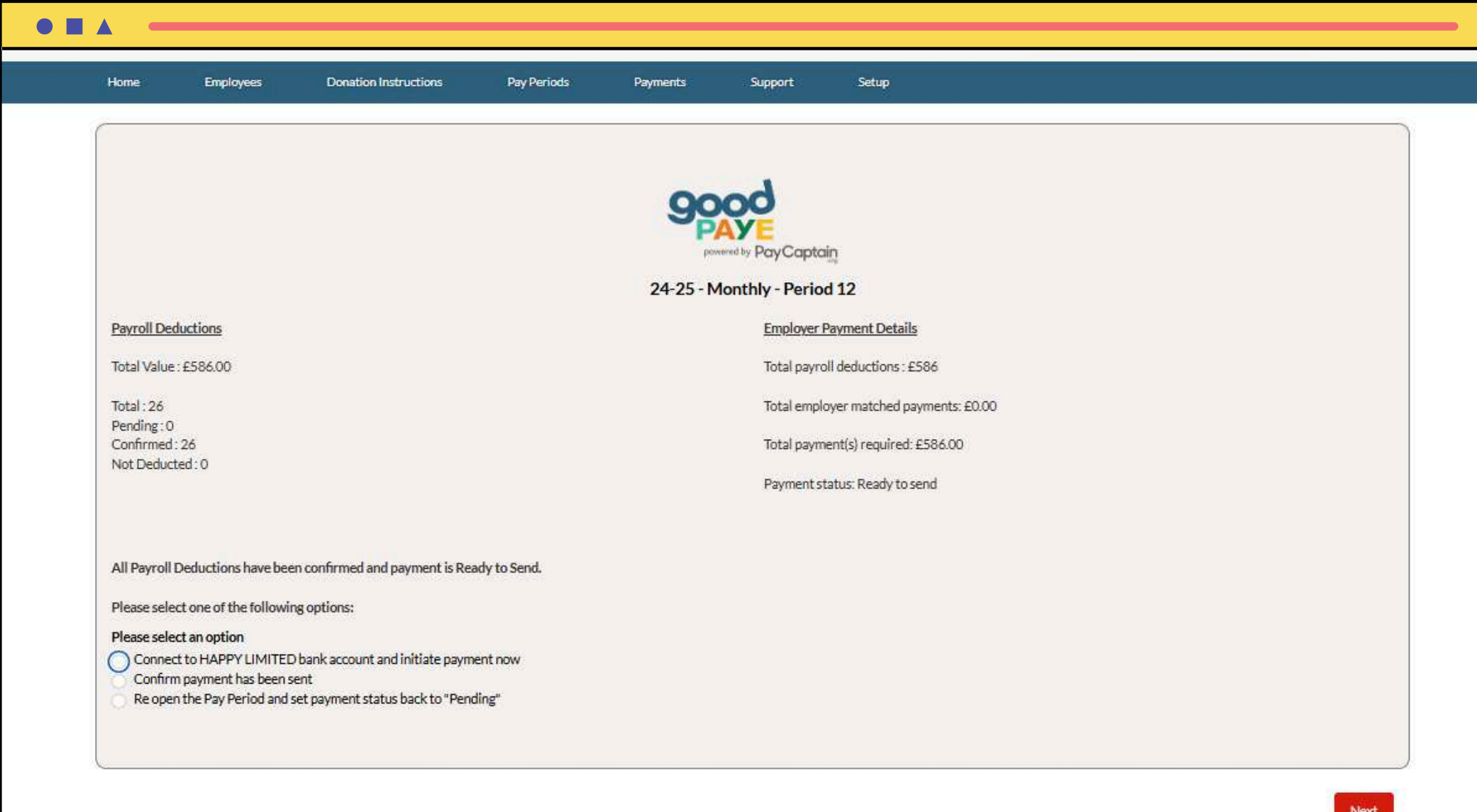
Name and Payroll ID	Deduction Amount	Payroll Deduction Status
<input checked="" type="checkbox"/> Daniel Graham 65	149	Pending
<input checked="" type="checkbox"/> Laura Ashley 210	92	Pending
<input type="checkbox"/> Jake Smith 25	45	Pending
<input type="checkbox"/> Taylor Jones 111	40	Pending

Step 5

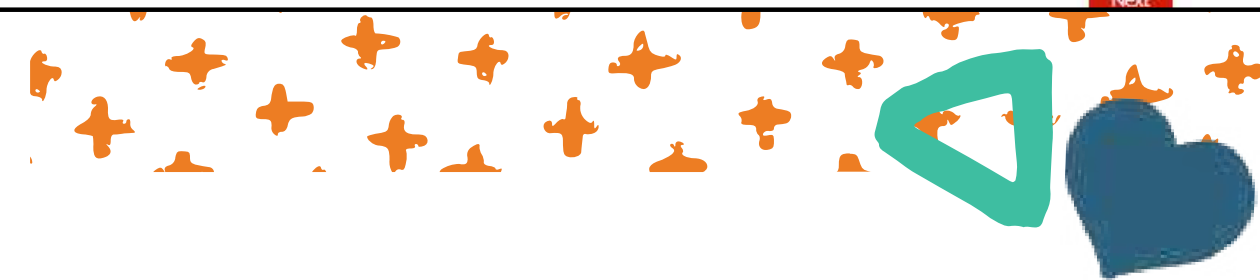
Confirm deductions

By now you would have made the deductions from employees' pay using the relevant report, and you would have marked any employees whose donations you have not deducted. You now need to confirm.

1. **Select** the option '*Confirm all Payroll Deductions for the Period and set payment status to "Ready to Send"*'. An automatic confirmation email will now be sent to the finance contact for payment.
2. If you are involved in finance, proceed to make the payment on screen. You can use the faster payment method, or transfer via BACS. Both of which are explained in the next step.
3. If you're not involved in the finance process, close the window as your task is done!



The screenshot shows a web browser window with a yellow header and a dark blue navigation bar. The navigation bar contains links for Home, Employees, Donation Instructions, Pay Periods, Payments, Support, and Setup. The main content area is white and features the 'good PAYE' logo, which is powered by PayCaptain. Below the logo, the text '24-25 - Monthly - Period 12' is displayed. The page is divided into two columns of information. The left column, titled 'Payroll Deductions', shows a total value of £586.00, with 26 total items, 0 pending, 26 confirmed, and 0 not deducted. The right column, titled 'Employer Payment Details', shows total payroll deductions of £586, total employer matched payments of £0.00, total payment(s) required of £586.00, and a payment status of 'Ready to send'. A message states 'All Payroll Deductions have been confirmed and payment is Ready to Send.' Below this, there are three radio button options: 'Connect to HAPPY LIMITED bank account and initiate payment now' (selected), 'Confirm payment has been sent', and 'Re open the Pay Period and set payment status back to "Pending"'. A red 'Next' button is visible in the bottom right corner of the browser window.



Step 6

Make payment

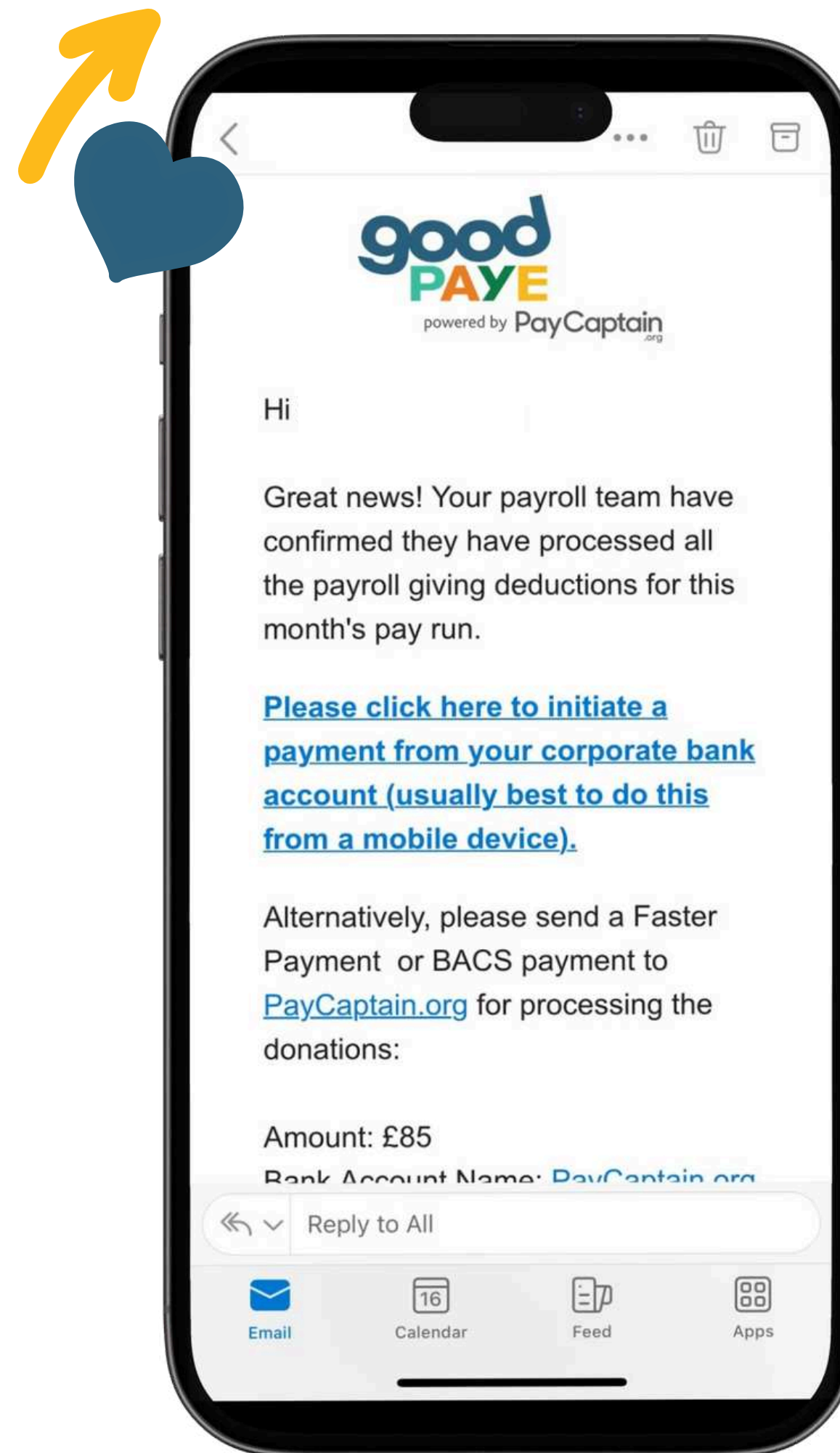
Time to check your inbox. An email containing the below information has now been sent to you to make payment:

- *Total amount to transfer*
- *Bank Account Name*
- *Sort Code*
- *Account Number*
- *IBAN*
- *Reference number*

There are two ways to make payment:

1. **Yapily:** Simply follow the link in the email which will prompt you to connect to your bank, log in, and make the payment.
2. **BACS Payment:** Using the information in the email, transfer the donations manually.

If transferred via BACS, please click the link in the email to confirm your payment has been made.



 Employee

Signing up as an Employee

Donate within minutes

There are 1000s of charities that are working hard for a better world. By donating directly to them from your salary, pre-tax, your donations will go even further, helping charities to create real impact through their work.



1

Visit your company donation page

Your company will provide a link or QR code to access the GoodPAYE form, available on internal channels like an Intranet and company emails.



1

Visit your company donation page

Your company will provide a link or QR code to access the GoodPAYE form, available on internal channels like an Intranet and company emails.

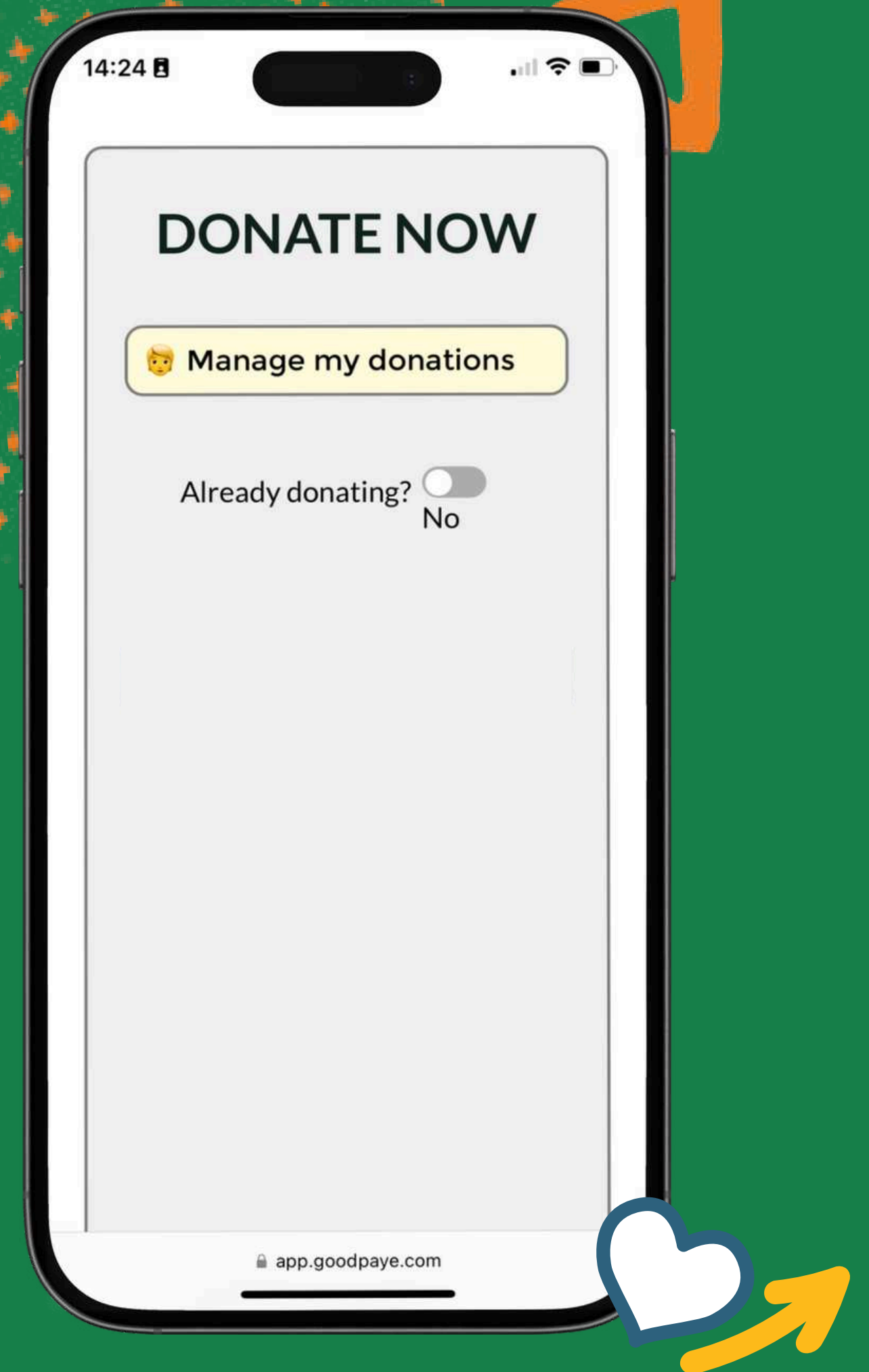
2

Set up your donations

If you are setting up your Payroll Giving donations for the very first time, you can scroll to the next section.

Manage your donations

If you are returning to manage your donations, click the toggle and enter your email address. You'll then receive a web link for you to access your account.



1

Visit your company donation page

Your company will provide a link or QR code to access the GoodPAYE form, available on internal channels like an Intranet and company emails.

2

Set up your donations

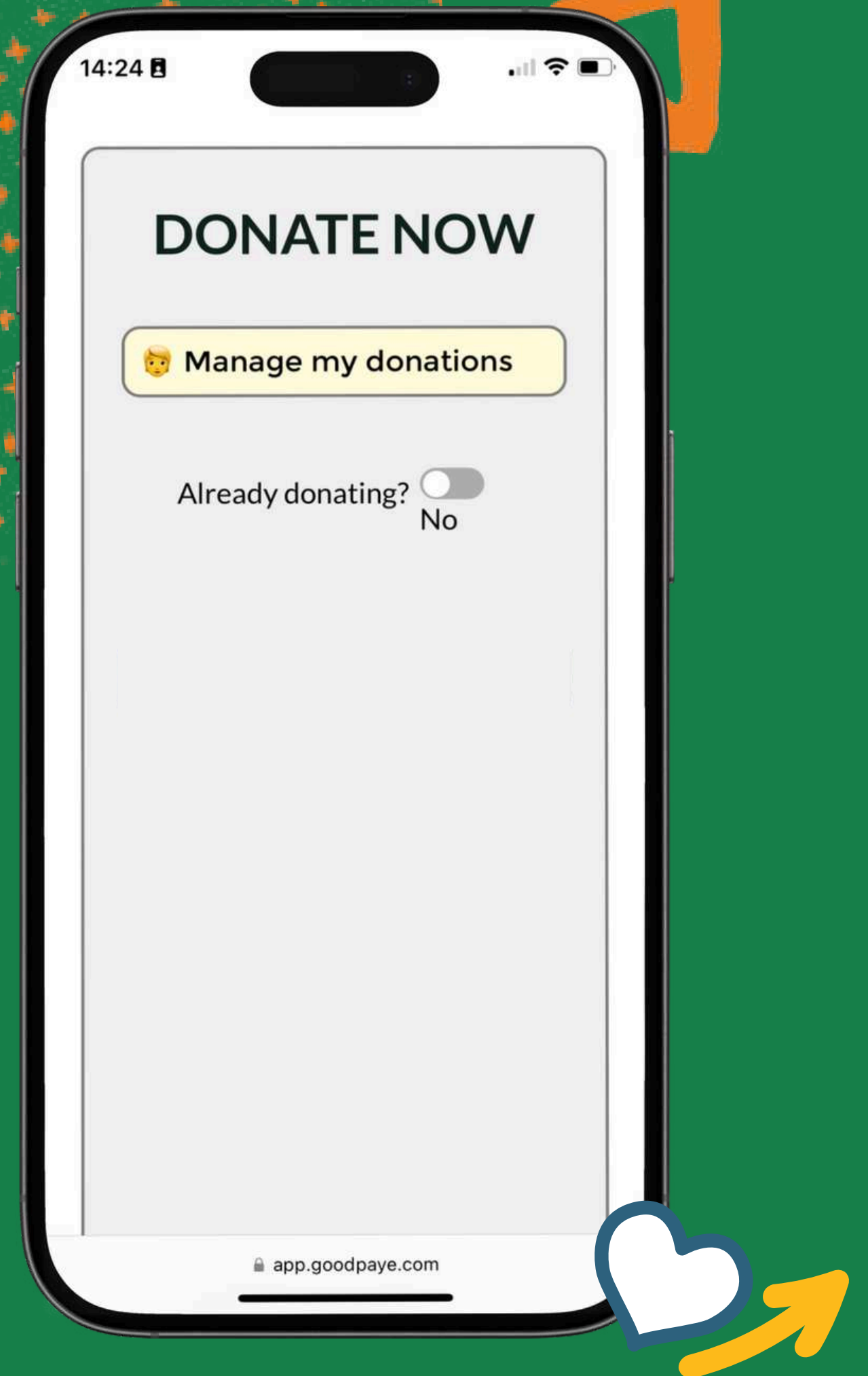
If you are setting up your Payroll Giving donations for the very first time, you can scroll to the next section.

Manage your donations

If you are returning to manage your donations, click the toggle and enter your email address. You'll then receive a web link for you to access your account.



After clicking the web link, you'll be taken to your account where you can manage your donations. From here, you can check to see if your charities have received your donations, amend your donation amounts, or add more charities to your account.



1

Visit your company donation page

Your company will provide a link or QR code to access the GoodPAYE form, available on internal channels like an Intranet and company emails.

2

Set up your donations

If you are setting up your Payroll Giving donations for the very first time, you can scroll to the next section.

Manage your donations

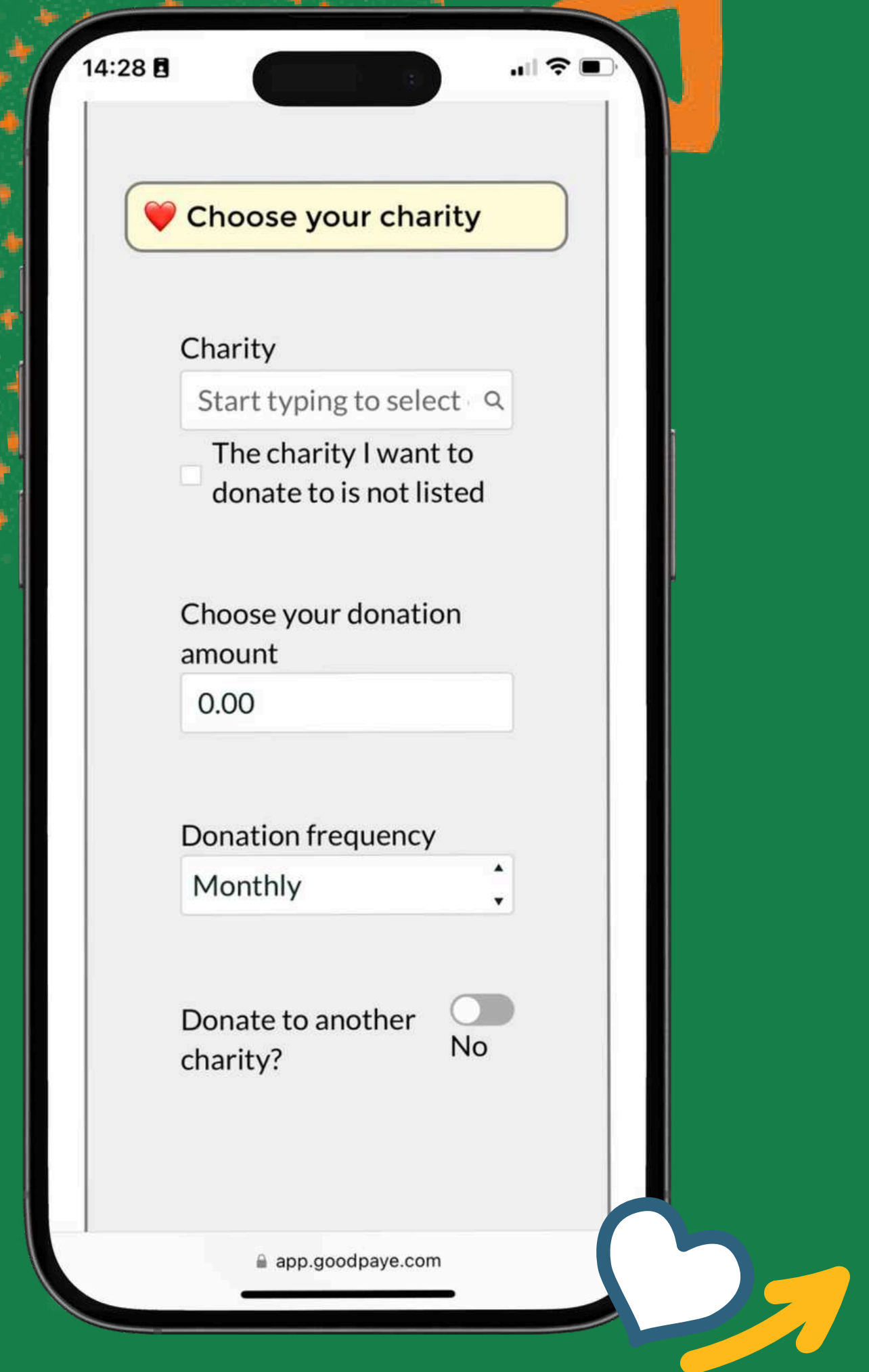
If you are returning to manage your donations, click the toggle and enter your email address. You'll then receive a web link for you to access your account.

3

Choose your charity

You can search for a charity by typing in its name. If the charity doesn't appear in the drop down list, tick "*The charity I want to donate is not listed*" and enter the details manually. You can donate to **any UK registered charity**.

Next, specify the donation amount and choose between a monthly or one-off donation. If you want to donate to an additional charity, **click** the toggle.



4

Fill in your details

Next, we just need a few details in order for us to set up your donations. We also need either your Employee/Payroll Number or National Insurance Number so that the payroll team can identify this request correctly.

The image shows a smartphone screen with a form titled "Your details". The form has the following fields:

- First name:
- Last name:
- Email:
- Phone:
- Your address:
- Street:
- City:
- State/Provinc:

The browser address bar at the bottom shows "AA app.goodpaye.com". There are also navigation icons for back, forward, share, and search.

4

Fill in your details

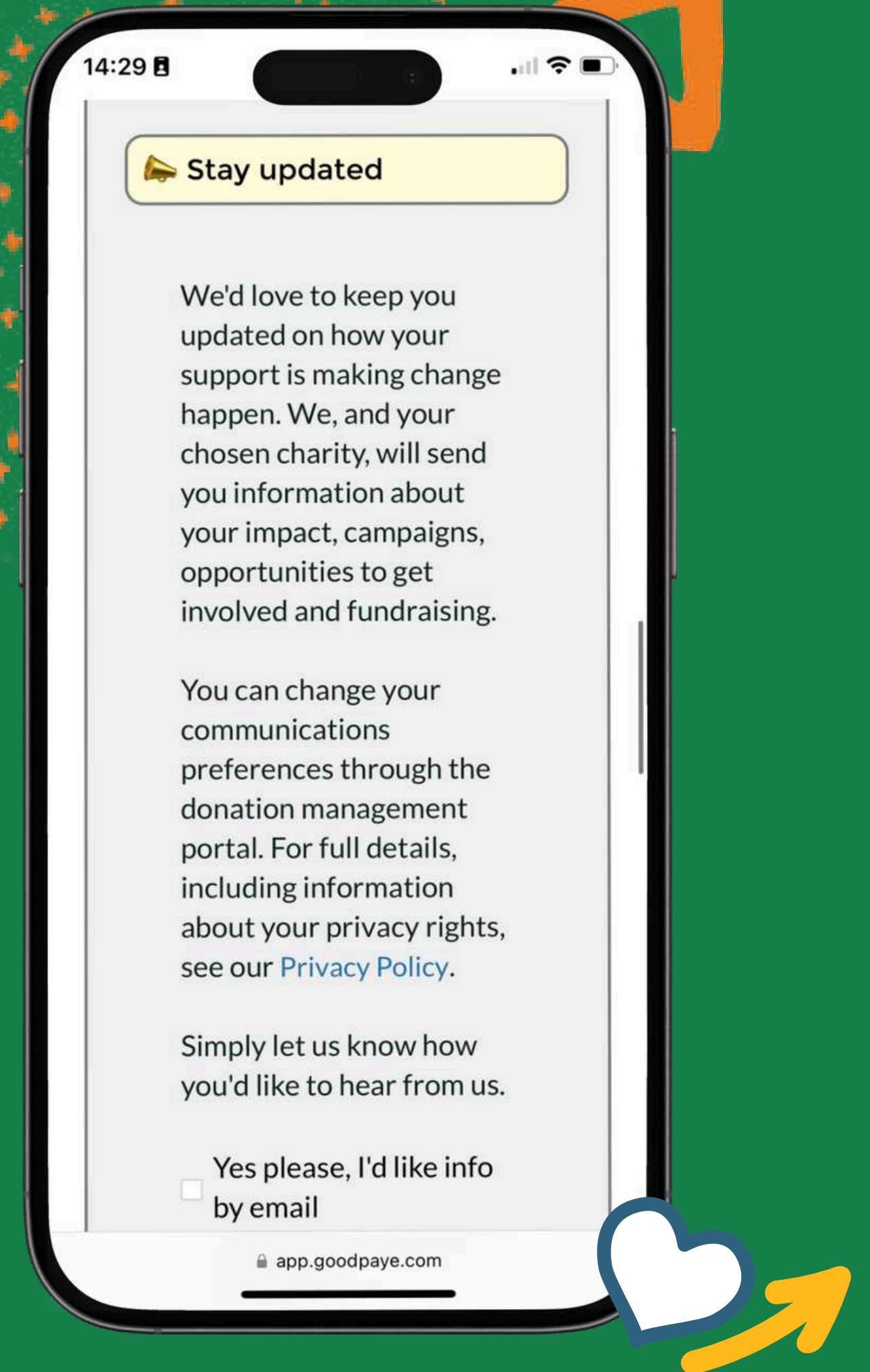
Next, we just need a few details in order for us to set up your donations. We also need either your Employee/Payroll Number or National Insurance Number so that the payroll team can identify this request correctly.

5

Stay updated

Both your charities and GoodPAYE would like to stay in touch with you so you can keep updated on how your donations are making change happen.

Select how you would like to hear from us.



4

Fill in your details

Next, we just need a few details in order for us to set up your donations. We also need either your Employee/Payroll Number or National Insurance Number so that the payroll team can identify this request correctly.

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Stay updated

Both your charities and GoodPAYE would like to stay in touch with you so you can keep updated on how your donations are making change happen.

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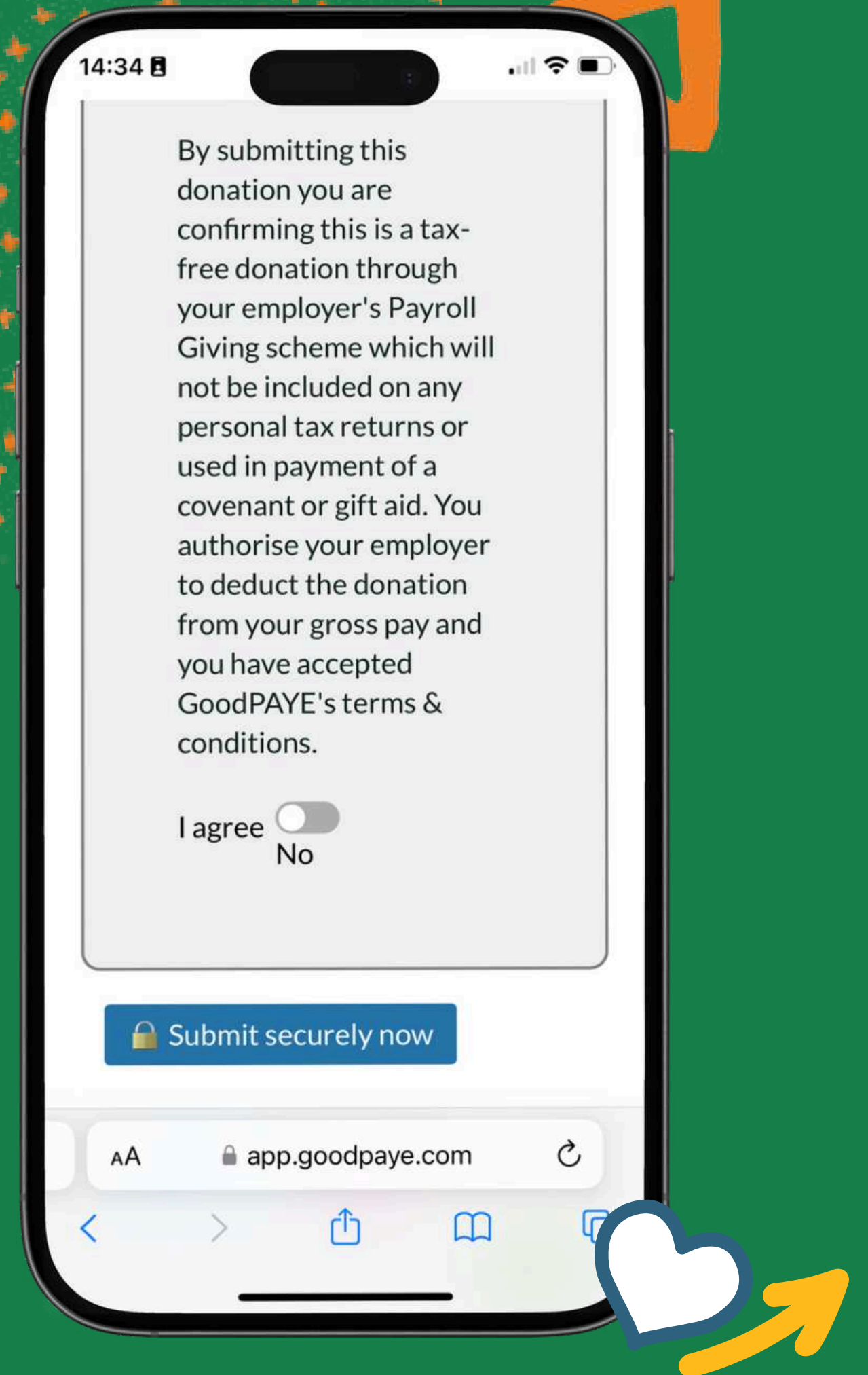
6

Submit securely

Finally, take a read of our Terms & Conditions and Privacy Policy. Once you're happy, and all fields are completed, click **submit securely**.

Check your inbox! You will now receive a confirmation email detailing a summary of your donations. Make sure to **confirm your account**. To log back in, visit:

<https://app.goodpaye.com/s/donate>



Support

Our team are always on hand to help you. You can either raise a ticket when logged in to GoodPAYE, or contact the team directly:

✉ support@GoodPAYE.com or

☎ +44(0)1227 361960

