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Synod of NSW & ACT

Preceda Employee Self Service (ESS) User Guide

Employee Self Service User Guide

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Version 1.3

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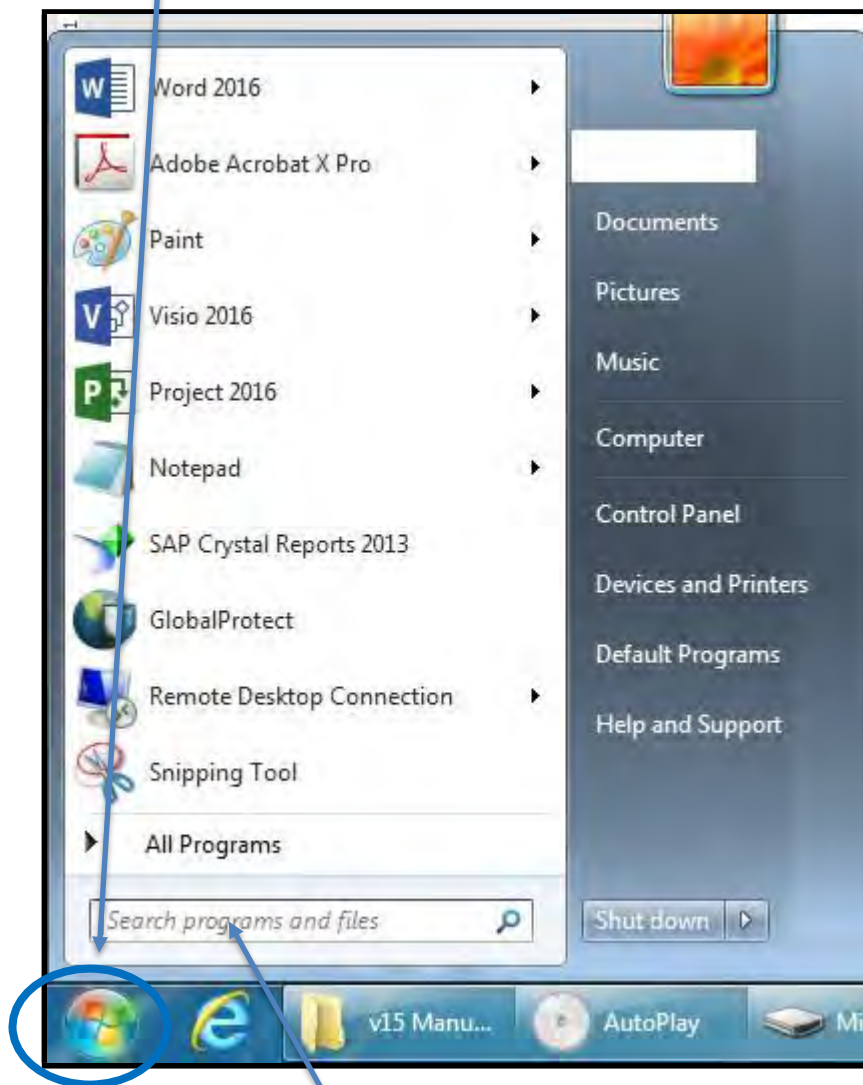
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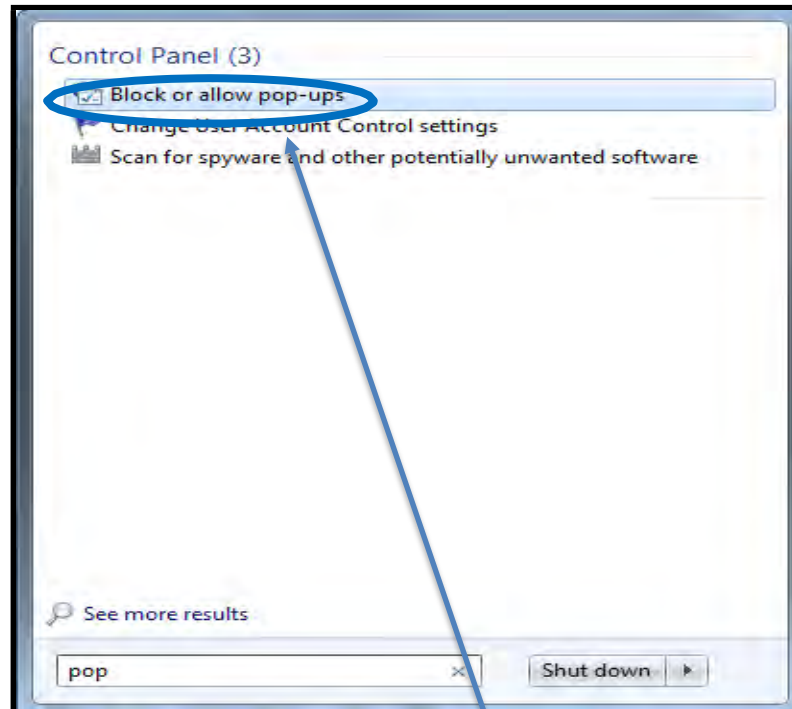
1. First Time Access to Employee Self Service

Before you log on to the system, please ensure POP UPS are **not** blocked via your internet browser (you will only need to do this the **first time** that you log onto Preceda):

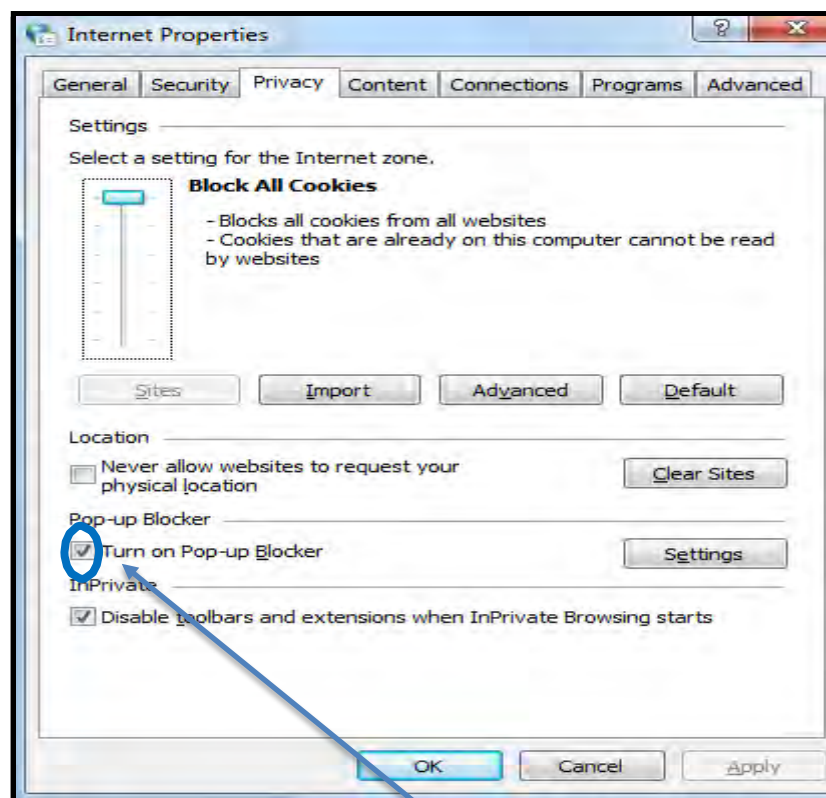
- Click on **Start** button at the bottom left hand corner of your computer screen:



- Type in the word **pop** in the search box that appears
- The following screen will appear:



- Select “**Block or allow pop-ups**”
- The following screen will appear:



- Untick “**Turn on Pop-up Blocker**”
- Click **OK**

You are now ready to log onto Preceda.

Go to <https://www.preceda.com.au/logon> via the **internet explorer**  web browser and you will see the following log in screen:

The image shows a login screen for Preceda. At the top, the word "Ascender" is in small text above the Preceda logo, which consists of a cloud with a lightning bolt and the word "Preceda". Below the logo are three input fields labeled "Username", "Password", and "Client". Each field is a white rectangle. Below the "Client" field is a green "Sign In" button. At the bottom, there is a checkbox with a checkmark and the text "Remember username | Forgotten password?". Below that is a link that says "Switch to mobile".

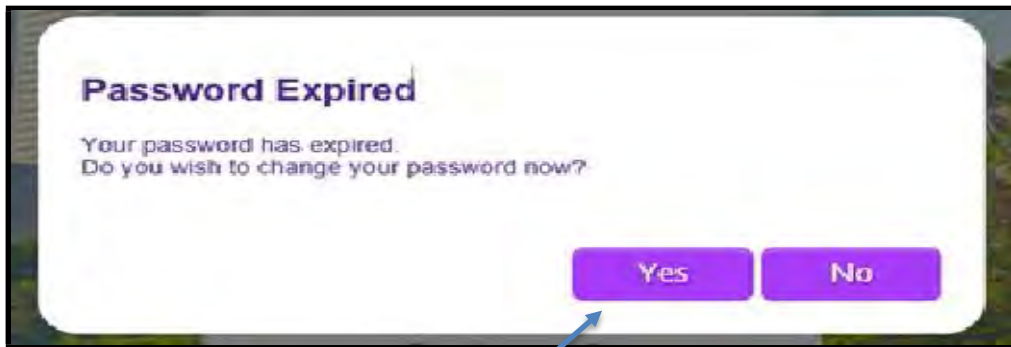
Step 1 - Enter “User Name”, “User Password” and “Client”

- Manually enter (do not copy and paste) the details as you would have received in your “Welcome” email from Preceda (“UCA Messenger”).
- Your **User Name** will be your [email address](#).
- Your initial **Password** will be supplied in your Welcome email (do not copy and paste the password from the email – please type it.)
- **Client** is always **UCA**

If you experience any difficulties in logging in, please call UR Payroll on **02 8267 4288** or email payroll@nswact.uca.org.au

Step 2 - Changing Password

When you log into Employee Self Service for the **first time**, you will be prompted to change your password as follows:



Click the **Yes** button to proceed.

To Change Password:

1. **"User Name"** is your *email address* and will populate automatically
2. Enter **"Current Password"**
3. Enter **"New Password"** This can be in either alpha or alpha-numeric, but it must commence with a letter of the alphabet.
4. Enter **"Confirm Password"** by re-entering the password from step 2
5. Enter two **"Secret Questions"** for security reasons, i.e. if you forget your password. You will also need to enter the **"Secret Answers"**. You will need to ensure that both sets of questions and answers are populated.
6. Click on **"OK"** to proceed

2. Disabling Your Account

If you have attempted and failed to log on five (5) times you will be given a warning message. Your access will be disabled and you must contact UR Payroll (on **02 8267 4288** or email payroll@nswact.uca.org.au) in order to have it re-enabled.

3. Forgetting Your Password

If you have attempted and failed to log on no more than four (4) times, you will be given a warning message to indicate that if you attempt and fail to log in again, your access will be disabled.

However, you may have forgotten your password and if your account **has not yet been disabled**, you can reset your password yourself by doing the following:

- Click on “**Forgotten password**” option as per below:



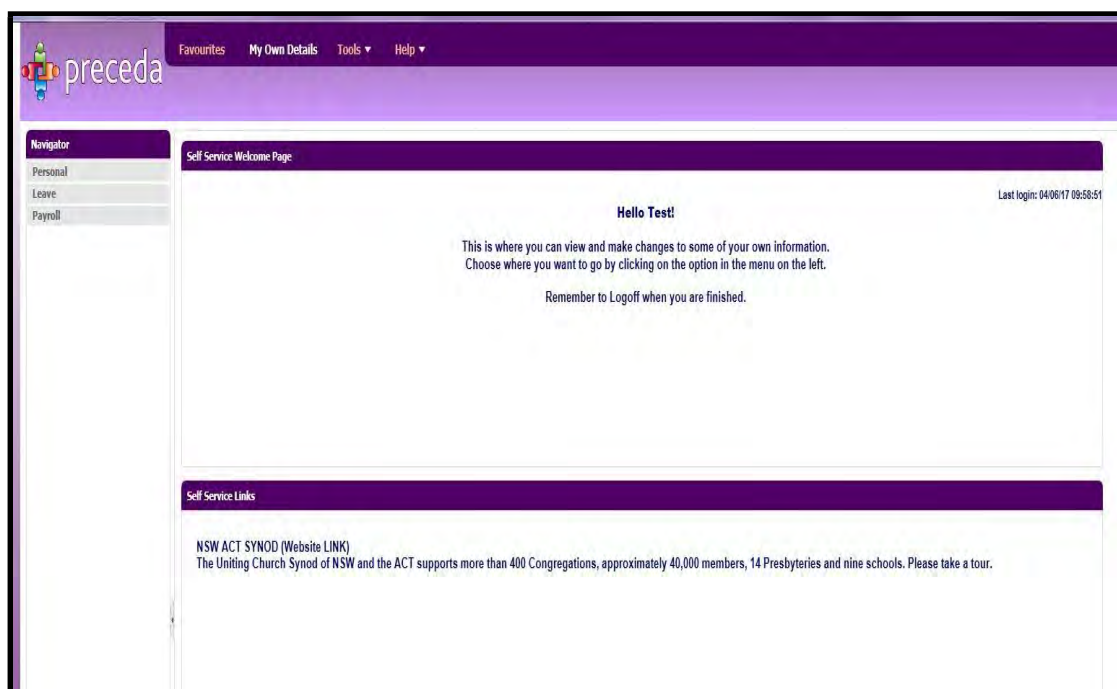
- Enter your “**User Name**” (*email address*) and “**Client**” (UCA), click **next**.
- You will be asked to enter your surname and date of birth. Do this and click **next**.
- Enter the answers you have nominated to the secret questions above (note these are the questions you have set when you originally set your employee self-service password). The answers you type in are not case sensitive, then click **next** and **continue**
- You will now be emailed a new password. Please follow the instructions. This password will only allow you one login to the payroll system and you

will be required to enter a new password (which is what you keep going forward).

- Please Note: The system will not allow you to nominate and use a previous password.

4. Using Self Service

After you have successfully logged onto the system the Employee Self Service Welcome window appears. The information on this window and the layout will look similar to the below:



As an Employee or Minister, you will have access to view your information under each section:

Personal

- Personal Details
- Contact Details
- Emergency Contacts
- Bank Details

Leave

- Leave Entitlements
- Leave History

Payroll

- Pay slips
- Payment Summary History

The information that you are able to view is kept on electronic file by the NSW/ACT Synod HR and Payroll departments, and is to remain **strictly** confidential. You can update any information that is displayed within an active field at any time. These changes will be recorded on your personnel file, and are assumed to be correct as entered by you.

5. Personal Information

5.1 Personal Details

This window shows you all of your own details, and some fields can be updated.

The screenshot shows a web application interface for 'Personal Details'. On the left is a 'Navigator' menu with options: Personal, Personal Details (selected), Contact Details, Emergency Contact, Bank Details, Leave, and Payroll. The main area is titled 'Personal Details' and includes action buttons: New, Save, Delete, Refresh, and Clone. The form fields are as follows:

- Title: Miss (dropdown)
- Surname: Test
- First Name: Test
- Middle Name: (empty)
- Other Name: (empty)
- Preferred Name: Test (text input)
- Report Name: Test T. (text input)
- Gender: F (radio button), Female (radio button)
- Marital Status: (dropdown)
- Age: 0 (text input)
- Date of Birth: (empty)
- Place of Birth: (empty)
- Residential Address: 123 Street (text input)
- City/Suburb: Sydney (text input)
- State/Region: NSW (dropdown)
- Postcode: 2000 (text input)
- Country: (empty)
- Residential Phone Number: 02 9423 2534 (text input)
- Mobile Phone: 0421 251 777 (text input)
- Initials: T (text input)

You can change all fields on this window except for the following:

- First Name
- Middle Name
- Other Name
- Surname
- Birth Date

Australian laws state that these fields can be changed only with documented proof and by those with the appropriate authorisation, i.e. the Synod Payroll or Human Resources departments, only after you have completed a form and submitted it with supporting evidence.

The address fields in this window that you change and save will update your records in the payroll system. Please make sure that your full address is correct and that state and postcode details are entered.

TIPS & HINTS

Requirements for the Reporting of Address fields are:

- Valid values are A-Z,0-9,(),space,&,/ ,apostrophe," , hyphen
- Full stops are NOT permitted in address fields
- Where address fields are entered, they must not contain a blank at the beginning of the field, nor may they contain two spaces between characters or words
- Always check the accuracy of your data entry before you click **Save**

5.2 Contact Details

Any information already on file is automatically displayed in your “Contact Details” panel. Any fields in this window that you change and save will update your personnel records.

Please ensure that your phone numbers are correct and entered in the format NN NNNN NNNN for landlines and NNNN NNNN NNN for mobiles, as well as your current business and personal email addresses. You can update this information. Always double check the accuracy of your data entry before you click **Save**.

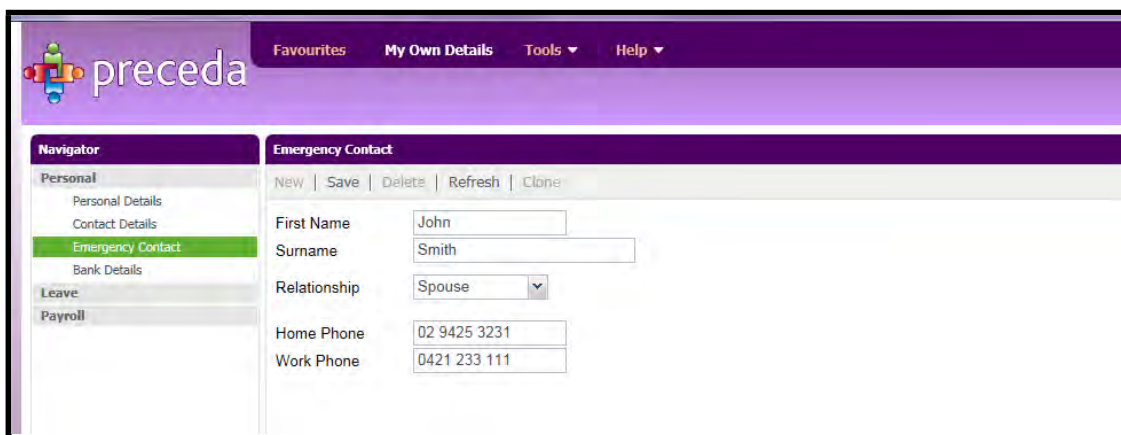
The screenshot shows a web interface for updating contact details. On the left is a sidebar menu with options: Personal, Personal Details, Contact Details (highlighted), Emergency Contact, Bank Details, Leave, and Payroll. The main area has a header with 'New | Save | Delete | Refresh | Clone'. Below this are input fields for: Mobile Phone No, Fax Number, Other Number 1, Other Number 2, Other Number 3, Business Email Address, and Personal Email Address (pre-filled with 'testemployee@hotmail.com'). A section titled 'Other Details' contains dropdown menus for Nationality, Country of Birth, Language Code, and Aboriginal Torres St Isl (pre-filled with 'N').

5.3 Emergency Contacts

This window is used to list your emergency contact information. Any information already on file is automatically displayed. This is the relevant information of the person you would like to be contacted in case of emergency.

****It is very important to ensure that Emergency Contacts are completed and up to date at all times****

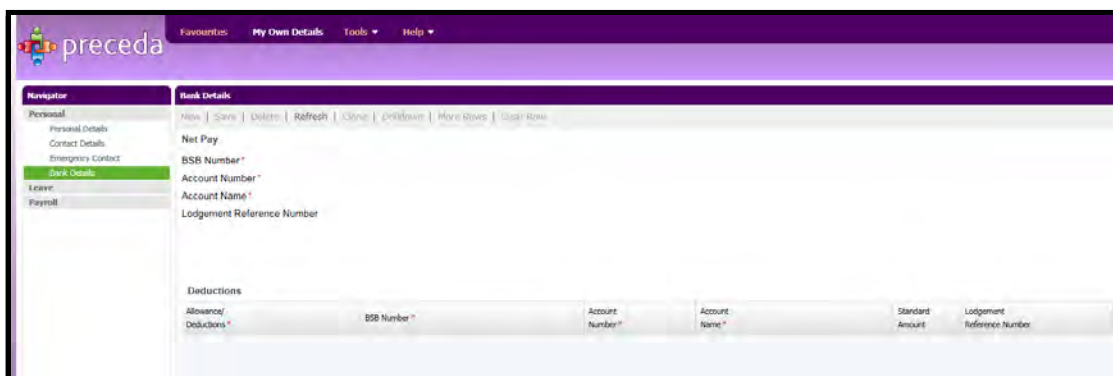
Only one emergency contact can be entered. You can view/update this information. Any fields in this window that you change and save will update your personnel records. Always double check the accuracy of your data entry before you click **Save**.



The screenshot shows the 'preceda' web application interface. The top navigation bar includes 'Favourites', 'My Own Details', 'Tools', and 'Help'. The left sidebar has a 'Navigator' menu with options: 'Personal', 'Personal Details', 'Contact Details', 'Emergency Contact' (highlighted), 'Bank Details', 'Leave', and 'Payroll'. The main content area is titled 'Emergency Contact' and contains a form with the following fields: 'First Name' (John), 'Surname' (Smith), 'Relationship' (Spouse), 'Home Phone' (02 9425 3231), and 'Work Phone' (0421 233 111). Above the form are buttons for 'New', 'Save', 'Delete', 'Refresh', and 'Clone'.

5.4 Bank Details

This window displays the details of all the Bank Accounts to which your salary is to be paid into.



The screenshot shows the 'preceda' web application interface for the 'Bank Details' section. The top navigation bar is the same as the previous screenshot. The left sidebar's 'Navigator' menu has 'Bank Details' highlighted. The main content area is titled 'Bank Details' and contains a form with the following fields: 'Net Pay', 'BSB Number*', 'Account Number*', 'Account Name*', and 'Lodgement Reference Number'. Below these fields is a table for 'Deductions' with columns: 'Allowance/Deductions*', 'BSB Number*', 'Account Number*', 'Account Name*', 'Standard Amount', and 'Lodgement Reference Number'. Above the form are buttons for 'New', 'Save', 'Delete', 'Refresh', 'Clone', 'Printdown', 'More rows', and 'Add row'.

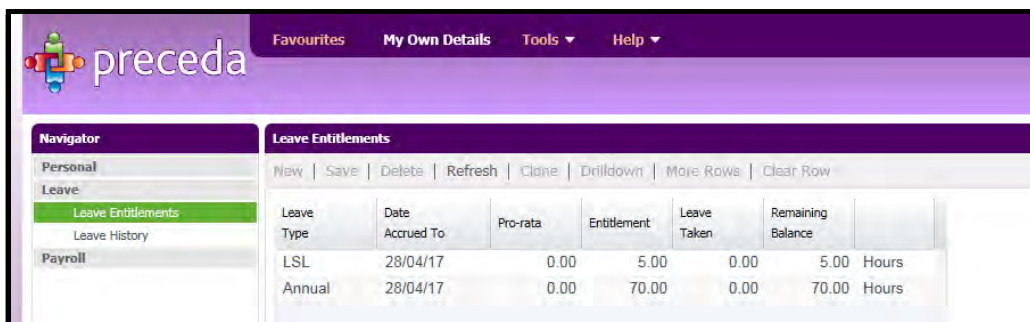
To update/change this information please call UR Payroll on 02 8267 4288 or email payroll@nswact.uca.org.au.

6. Leave

6.1 Leave Entitlements

Under **Leave**, the **Leave Entitlements** window will allow you to view current Leave Entitlements as accrued up to a certain date within your personnel file.

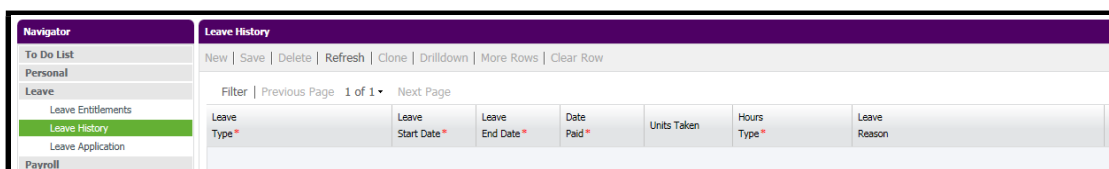
This is a display only window and no information can be changed. Please note that all leave balances are displayed in **hours**.



Leave Type	Date Accrued To	Pro-rata	Entitlement	Leave Taken	Remaining Balance	
LSL	28/04/17	0.00	5.00	0.00	5.00	Hours
Annual	28/04/17	0.00	70.00	0.00	70.00	Hours

6.2 Leave History

Under **Leave**, the **Leave History** window will allow you to view any leave you have taken in the past.



Leave Type *	Leave Start Date *	Leave End Date *	Date Paid *	Units Taken	Hours Type *	Leave Reason
--------------	--------------------	------------------	-------------	-------------	--------------	--------------

A	Annual	24/09/18	24/09/18	28/09/18	7.60	12	Annual L	
A	Annual	24/04/18	24/04/18	27/04/18	7.60	12	Annual L	
A	Annual	15/01/18	15/01/18	19/01/18	7.60	12	Annual L	
A	Annual	30/09/17	06/10/17	13/10/17	15.60	12	Annual L	
A	Annual	14/07/17	14/07/17	21/07/17	3.80	12	Annual L	

You can also view the leave details by double clicking on any of the individual leave transaction lines above: This will open a new window, which displays the leave details:

Close | New | Save | Delete | Refresh | Clone | Print Preview

Leave Type* A Annual

Leave Start* 24/09/18

Leave End* 24/09/18

Date Paid* 28/09/18

Units Taken 7.60

Hours Type* 12 Annual L

Leave Reason

Continued From Previous Pay 1 Leave paid not a continuation from a previous pay

Comment

7. Payroll

7.1 Payslips

Under **Payroll**, the **Payslips** window will allow you to access your historical pay slip information as stored on your personnel file after each pay run.

This is a display only window and no information can be changed.

Navigator		Payslips									
Personal		New Save Delete Refresh Clone More Rows Clear Row									
Leave		Click to view selected Pay slip									
Payroll		Email Pay slip									
Payslips		1 of 1									
Payment Summary History											
STP Summary History											
		For Period	Pay	Weeks	Pay Method*	Payment Date*	Super	Gross	Tax	Net	Pay Seq
		Ending*	Seq	In Pay			Payment				Number

Click to view selected Payslip

For Period Ending	Pay Sep	Weeks In Pay	Pay Method	Payment Date	Super Payment	Gross	Tax
30/11/08		4.333 B	Bank Credit	15/11/08	15/11/08	4050.00	767.00
31/10/08		4.333 B	Bank Credit	15/10/08	15/10/08	4050.00	767.00
30/09/08		4.333 B	Bank Credit	15/09/08	15/09/08	4050.00	767.00
31/08/08		4.333 B	Bank Credit	15/08/08	15/08/08	4050.00	767.00
31/07/08		4.333 B	Bank Credit	15/07/08	15/07/08	4050.00	767.00
31/05/08		4.333 B	Bank Credit	15/05/08	15/05/08	4050.00	940.00
30/04/08		4.333 B	Bank Credit	15/04/08	15/04/08	4050.00	940.00
29/02/08		4.333 B	Bank Credit	15/02/08	15/02/08	4050.00	940.00
31/01/08		4.333 B	Bank Credit	15/01/08	15/01/08	4050.00	940.00
30/10/07		4.333 B	Bank Credit	15/10/07	15/10/07	4050.00	940.00
30/09/07		4.333 B	Bank Credit	15/09/07	15/09/07	4050.00	940.00
31/08/07		4.333 B	Bank Credit	15/08/07	15/08/07	4050.00	940.00
07/07/07		4.333 B	Bank Credit	10/07/07	10/07/07	4050.00	940.00
30/06/07		4.333 B	Bank Credit	15/06/07	15/06/07	4050.00	940.00
31/05/07		4.333 B	Bank Credit	15/05/07	15/05/07	4050.00	940.00
30/04/07		4.333 B	Bank Credit	15/04/07	15/04/07	4050.00	940.00

Select a payslip and then select **“Click to view selected Payslip”**

Printing Payslips

You can then print your individual pay slips, and each pay slip will contain all information about how the pay was calculated, as well as any legislative requirements.

Your Payslip will appear in a separate window, from which you can print.

If you have any questions regarding the information shown on this page, please call UR Payroll on 02 8267 4288 or email payroll@nswact.uca.org.au

Emailing Payslips

You can also email your individual pay slips, and each pay slip will be sent to the email address held under your Preceda Contact Details screen:

Click to view selected Payslip

For Period Ending	Pay Sep	Weeks In Pay	Pay Method	Payment Date	Super Payment	Gross	Tax
30/11/08		4.333 B	Bank Credit	15/11/08	15/11/08	4050.00	767.00
31/10/08		4.333 B	Bank Credit	15/10/08	15/10/08	4050.00	767.00
30/09/08		4.333 B	Bank Credit	15/09/08	15/09/08	4050.00	767.00
31/08/08		4.333 B	Bank Credit	15/08/08	15/08/08	4050.00	767.00
31/07/08		4.333 B	Bank Credit	15/07/08	15/07/08	4050.00	767.00
31/05/08		4.333 B	Bank Credit	15/05/08	15/05/08	4050.00	940.00
30/04/08		4.333 B	Bank Credit	15/04/08	15/04/08	4050.00	940.00
29/02/08		4.333 B	Bank Credit	15/02/08	15/02/08	4050.00	940.00
31/01/08		4.333 B	Bank Credit	15/01/08	15/01/08	4050.00	940.00
30/10/07		4.333 B	Bank Credit	15/10/07	15/10/07	4050.00	940.00
30/09/07		4.333 B	Bank Credit	15/09/07	15/09/07	4050.00	940.00
31/08/07		4.333 B	Bank Credit	15/08/07	15/08/07	4050.00	940.00
07/07/07		4.333 B	Bank Credit	10/07/07	10/07/07	4050.00	940.00
30/06/07		4.333 B	Bank Credit	15/06/07	15/06/07	4050.00	940.00
31/05/07		4.333 B	Bank Credit	15/05/07	15/05/07	4050.00	940.00
30/04/07		4.333 B	Bank Credit	15/04/07	15/04/07	4050.00	940.00

Double click the required payslip line, as above:

The below screen will open up:

Click on “**Email Payslip**” as indicated

Company L1 1 EXTREME ELECTRONICS PTY LTD

For Period Ending Payment Date Super Payment Date

Pay Sequence Number 0 Pay Separator

No. of Weeks in Pay 4.333 Pay Method B Bank Credit

Gross 4050.00 Tax 267.00

Net 3249.00

Email Payslip

Type	Code	Description	Rate	Amount	Rate	Amount	Rate	Amount
H	Hours	01 NORMAL	154.57	4000.00	0.00	0.00	0.00	4000.00
A	A/D	BA 3RD BANK DEDUCT	1.00	0.00	0.00	0.00	850.00	850.00
A	A/D	CA CAR ALLOWANCE	1.00	0.00	50.00	0.00	0.00	50.00
A	A/D	CD ENTERTAINMENT AL	1.00	50.00	0.00	0.00	0.00	50.00
A	A/D	CQ EXEC SUPER GROS	1.00	0.00	0.00	0.00	210.00	210.00
A	A/D	MU MUTUAL COMMUNIT	1.00	0.00	0.00	80.00	0.00	80.00
A	A/D	SO SOCIAL CLUB	1.00	0.00	0.00	4.00	0.00	4.00

If you wish, you can also send yourself a PDF copy of your payslip via email. See the snapshot below for an example

Click on “**Send Email**” as indicated

An Email will be sent to 021506 KIRBY RUSSELL SAM

For Period Ending 30/11

Email To B Business Email Address education@neller.com.au

Enter additional email information

Subject PAYSIP FOR 15/11

Message

File Name PAYSIP1511

Send Email Cancel

1.

TIPS & HINTS

PERSONAL SECURITY: Be aware of the security of your personal pay details being printed. Choose your printer carefully.

7.2 Payment Summary (up to June 2018)

Under **Payroll**, the **Payment Summary History** window will allow you to access your historical payment summaries (formerly known as group certificates) for the respective Financial Year.

Please note that all Payment Summaries issued prior to July 1 2017 will need to be accessed from the previous version of Preceda (the database used prior to our update to a new Platform in July 1 2017).

If you have any questions regarding access to this legacy system, please call UR Payroll on 02 8267 4288 or email payroll@nswact.uca.org.au

To select your required payment summary, first you must click ONCE on the required payment summary line so that it is highlighted. Then double click to open the Payment Summary and select **"Print"**

preceda										
Favourites My Own Details Tools Help										
Navigator		Payment Summary History								
Personal		New Save Delete Refresh Clone Drilldown More Rows Clear Row								
Leave		Financial Year	Transfer Number	Printed Date	Printed User	Source Type	Gross Payments	Tax Withheld or Deducted	Taxable Component	Tax Free Component
Payroll										Amendment
Paylips										
Payment Summary History										
		2009	0	30/06/09	UNC13SC	I	32924	9622	0	0
		2008	0	02/07/08	UNC227PF	I	35538	9346	0	0

TIPS & HINTS

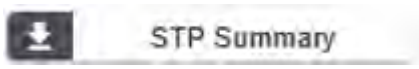
PERSONAL SECURITY: Be aware of the security of your personal payment summary details being printed. Choose your printer carefully.

7.1 STP Summary History (from July 2018)

The ATO made some changes on how earnings from employees must be reported to them. Payment Summaries (above) are no longer issued we are required to report each individual's earnings after each payroll to the ATO. At the end of the year, a finalisation process will take place and the summary will be accessible under **Payroll, STP Summary History**.

Note: This is a copy and the actual values have already been reported to the ATO.

To view and/or print your STP Summary, make sure the status is '**Finalised**'. Double-click on the line for the corresponding year. You will get a 'Drill-Down' version which is not intended for printing.

Click on **STP Summary** button  for a PRINT version (this may open in a new window).

PRECEDA STP SUMMARY
Finalisation For Year Ending 30/06/2019

Payee Details ID: 026 TFR: 0

Employee Name
Address Line
Suburb Code State

Payment Summary Type: Individual Non-business
TFN: 862

Gross	\$	98.00	Reportable Allowances CAR TRANSPORT LAUNDRY MEALS TRAVEL OTHER
Tax	\$	70.00	
RESC			
SG	\$	28.31	
Taxable RFB			
Exempt RFB			Reportable Deductions FEES WORKPLACE GIVING
Foreign Income			
Foreign Tax			
Lump A			
Lump B			
Lump D			
Lump E			
CDEP			

ETP Tax Free ETP Taxable ETP Tax ETP Code ETP Date

TIPS & HINTS

PERSONAL SECURITY: Be aware of the security of your personal payment summary details being printed. Choose your printer carefully.
