access
freedom to do more

# G-Cloud15
# Access Paycircle
# Service Definition

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# 1. Service Overview

Paycircle offers flexible payroll solutions designed to meet the diverse needs of UK businesses. Whether you want to run your payroll in house, an outsourcing service for your organisation's payroll, or Payroll software for your own Bureau, Paycircle offers compressive functionality with a modern, easy to navigate UI.

### Paycircle Solution Overview

### In-House Payroll - Your payroll, your control

Our payroll solution is designed to reduce administrative costs while improving accuracy and providing detailed management insights. Its flexible framework can be tailored to meet the specific needs of individual organisations. Fully compliant with UK legislation, the system is regularly updated in line with any legal changes.

With robust security features at both the database and application levels, the solution includes comprehensive audit capabilities. Employees can easily access their payslips online via self-service, which can be accessed on mobile devices or desktop. Additionally, they can update their payroll details, such as bank account information or address.

The solution operates with configurable parameters, offering your organisation the flexibility to adapt it to your unique payroll requirements. It supports both group and individual payroll processing, including online net pay calculations.

Key Features:

- Integration with our PeopleHR Solution
- Highly flexible structures and parameters
- Real-time entry and validation
- Updated to comply with HMRC
- Full pension Auto Enrolment
- Payrolling of Benefits
- Electronic payslips, P60s and P45s
- Support for multiple pay groups and cycles (weekly, bi-weekly, monthly, quarterly, etc.)
- Advanced security and audit tracking
- Parameter-driven statutory deductions and payments
- Occupational Rule configuration
- Integration to specified Pension Providers
- Intuitive report builder, in addition to a comprehensive set of standard reports
- HMRC integration for auto filing of RTI submissions and receiving coding notices etc.
- Configurable importing tool

Access Payroll Services is our managed payroll bureau offering, providing flexible outsourced payroll solutions powered by Paycircle

Key highlights:

**Managed Payroll Service (Access Payroll Services) Powered by Paycircle**

- Team of 100+ CIPP-accredited UK and Ireland-based payroll professionals
- Processes around £6 billion in payments annually with 99.9% net pay accuracy at first run
- First payroll bureau to achieve 100% in the CIPP Payroll Assurance Scheme
- Fully and Part Managed service options

Integrates with PeopleHR and other Access solutions for seamless data flow.

Key Features

- Paycircle Client Portal – Dedicated portal allowing users to upload payroll instructions, view payroll reports and sign off payroll.
- Dedicated payroll specialist – Your named expert who knows your business
- Quality assurance – Built-in checks and validation before every payroll run
- Pension administration – Expert handling of auto-enrolment and provider submissions
- Year-end services – Complete statutory reporting support

# 2. Onboarding

Our consultants follow a 4-phase, 12-step process and we propose a scale of project, management and administration that's appropriate for your specific needs. From evaluation, planning and design, through to implementation of your business solution.

### Access Implementation Methodology (AIM)

**Step 1: Needs analysis** - After detailed consultation we will clearly define your needs in a proposal document that identifies the benefits you will experience by updating your systems.

### Phase 1, Pre-project planning

**Step 2: Solutions demonstration** - We will take you through a tailored demonstration of your proposed solution and work with you to agree which elements will be included in the initial project. We listen and take account of all your feedback and will provide a quotation outlining the anticipated cost of your project.

**Step 3: Sales handover** - Having finalised the project's scope and agreed commercial terms, we prepare a handover document from sales to the project team who will partner you throughout implementation. They will meet with all appropriate members of your team to ensure continuity throughout the process.

### Phase 2, Configure & Install

**Step 4: Definition** - The Access project team will work with you to define the structure and control processes that will guarantee the success of your project. Documents that we provide you at this stage will cover all your project objectives, the full specification and success criteria. This gives total clarity over individual tasks and responsibilities to ensure you're fully informed going forward.

**Step 5: Solutions workshops** - this step helps your project team become fully immersed in the proposed software. We map business processes to functionality so that you can understand how the solution will look and feel.

### Phase 3, Training

**Step 6: Confirmation of requirements** - following your feedback from the solutions workshops, we will confirm the detailed actions and solution components necessary to meet the project success criteria we identified earlier.

**Step 7: Configuration** - the components identified in Step 6 are delivered and a User Acceptance Test (UAT) system is built ready for you to carry out a pilot test. We configure and tune all the variables within the system to match your specific requirements.

**Step 8: User Acceptance Test (UAT)** - the UAT is conducted in a workshop environment for your staff against an agreed test plan. At the end of this step, you will be ready to go live.

**Step 9: Education** – with a fully designed, installed and tested system now in place, we will train your staff on all relevant areas of the software. We are highly skilled at adapting our training to the learning styles of each of your staff members. We can train all of your staff or, if preferred, we will train your in-house.

**Phase 4, Support**

**Step 10: Go Live** - the test system is converted into a live working environment ready for the processing of real-time business transactions. This is managed by a pre-agreed go live check list to ensure all possible circumstances are considered and addressed. We will be on-site to answer your questions and support your users throughout this time, helping them to get maximum clarity and impact from the software as they become increasingly confident.

**Step 11: Support handover** – we prepare a handover document and deliver it to our ongoing support team. This document contains all the information our support consultants need to answer any future queries you may have.

**Step 12: Post project review** - your experience is extremely important to us. Shortly after you go live, we will request feedback on your experience of the implementation process to help us further refine our delivery processes. We then agree sign-off for the project.

# 3. Additional Service Options

The table below highlights the additional value added services that our consulting teams can provide. Please take some time to review these.

| | |
|---|---|
| Scoping and Workshop | Additional consultancy time for Scoping and Workshop to help drive out the Confirmation of Requirements |
| Administrator Training | 1 hour training covering all key areas for administration of expense (maximum 3 delegates) |
| Dimensions Plug-in Configuration | Additional installation of Dimensions plug-ins as required |
| Credit Card Training | Explanation of both methods (import & manual entry) and a guide on how to set them up and match/submit the lines |
| Project & Task Training | Explanation of upload process and how filters can be applied, as well as how to request the details based on Expense Type |
| End User Champion Training | Agreement to train up to 4 End User Champions to then knowledge share and train end users / assist administrators (submitting, approving etc) |
| Enterprise Documentation Creation | Creation of collateral for Enterprise customers to cover bespoke requirements specific to the environment. |
| Bespoke Consultancy | Any consultancy required to be conducted on behalf of the customer. For example, Emergency Admin/Data entry, Reconfiguration etc. Please contact Onboarding with requirements for quotation |
| FlexPoints | Access FlexPoints are a cost-effective, flexible way to easily access and consume value added services including customisation, training, integration, analytics or reporting, as your business needs evolve.<br>Access FlexPoints provide a simple way to create an allocation of points that you can call on at any time to spend on Access services. Having a banked allocation of FlexPoints provides the reassurance that as your business needs evolve you can use them to extend and modify your use of the technology. |

# 4. Service & Support Management Details

Providing you and your users with a high level of incident support is of prime importance to us. As well as being able to answer your queries, our support staff will also be able to inform you about the latest software releases, and provide hints and tips to ensure you are getting the most out of your product. To emphasise the importance of support to Access we have over 500 employees in the UK in our Support and Customer Success functions.

### Support Commitment

We recognise that the systems, software and services we supply may be critical to the well-being of your business. Our aim is to ensure that you have continuous operational capability from our products. We will help you to achieve this by providing efficient support, resolving the majority of tickets at first-line contact.

We will help you maximise your return on investment by providing the best in technical assistance, advice and customer care. We own your support queries and will ensure that they are resolved as promptly and efficiently as possible.

We provide 3 main support plans for Access Salary Extras as detailed below.

### The Essential Plan

The online service The Essential Plan is available to all Access customers as part of your license fee and provides you with easy-to-access online support for all your queries, facilitated via our Customer Success portal.

### The Standard Plan

Get answers faster - as a Standard Plan customer you benefit from faster response times and can access our support teams via telephone and live chat, as well as through our Customer Success portal. To help your team be more productive, you are provided with continued access to our e-learning content as well as a programme of Success webinars, designed to keep you up to date with new features and share best-practice advice and guidance.

### The Premier Plan

Boost productivity with direct access to the experts and achieve a higher return on investment - our Premier Plan enables your team to achieve more and improve productivity through an ongoing relationship with your own designated Customer Success Manager. Your CSM will get to understand how you're using the technology and will advise you on how to get more from it.

Full details of our Customer Success Plans can be found here Access Customer Success Plans

## Get to know our knowledge base

Knowledge Base is our huge database of commonly asked questions, articles and videos. All you need to do is Register and Login and you can find the answers you need any time of the day.

The advanced search function not only searches articles from Knowledge Base, but links up with our Community hub to display the topics that you need. So you've got everything you need all in one place.

Can't find the article to answer your question? Not a problem. Each article links to our Community so you can ask a question, or to raise a case with the Access team.

## Got a question? Ask our Community

Community connects our customers together to help them solve problems and share how to get the very best out of their Access products.

Our customers know more about using our products in their jobs than anyone else. Community gives you the chance to receive – and share – friendly expert advice that goes beyond normal customer support. Discover best practice hints and tips from peers in your industry to help you make the most of your experience with your Access product.

Each of our products has its own dedicated Community, so you can get straight to the discussions that matter to you. No unnecessary searching needed.

If a question can't be answered by Community a member of the Access team will reply. We'll make sure that no query goes unanswered.

# 5. Account Management & Customer Success

At Access, we are committed to helping our customers maximise the value of their investment. With over 160,000 customers using our products, we have a dedicated team focused on ensuring continued success and adoption of best practice.

Our Customer Success team consists of product specialists who support customers on Standard and Premier Success plans. They deliver educational webinars, share guidance on new functionality and help embed best practice into day-to-day operations and system configuration.

Complementing this, our Account Management team works closely with customers, specialising in vertical sectors or specific products. Depending on complexity, Account Managers provide service remotely using advanced technology or through on-site visits. They keep customers informed about emerging technologies, prepare briefings on business, technical and financial benefits and collaborate to ensure awareness of the full breadth of Access solutions and support**.**

### Implementation and Ongoing Engagement

During implementation, customers on the Premier Success plan are assigned a named Customer Success Manager (CSM). The CSM ensures the solution meets requirements, supports the transition to business-as-usual and drives engagement and adoption. They work closely with your project team, preparing action plans to keep the project on track and deliver expected outcomes and ROI.

The CSM acts as your trusted adviser and advocate, providing:

- Regular one-to-one meetings and telephone correspondence
- Solution demonstrations where appropriate
- Updates on new functionality, user events and enhancements
- Advice and recommendations to optimise system use
- Acting on feedback and product suggestions

They also serve as a point of contact for service-related issues, disputes or concerns and are familiar with your specific requirements. Our CSMs bring experience from roles in Support and Consultancy, giving them a broad understanding of Access solutions and customer needs.

Together, the Customer Success Manager and Account Manager ensure you receive both strategic and commercial guidance, helping you achieve long-term success and get the very best from your Access solutions.

# 6. Backup and Disaster Recovery

The solution has been designed to cater for disasters ranging from a database restore through to a complete data centre outage. This section covers all Access managed Data Centres

All backups are stored on disk and are retained as indicated below. They are stored within a multi tenancy data vault and are encrypted at rest. The design of the architecture means that all data is simultaneously available in both the primary data centre and the secondary data centre meaning data is always backed up to another geographically diverse site.

All servers are backed up on a daily basis outside of UK core hours. These backups go directly to storage in the DR Data centre to ensure off-site availability.

Backup technology in use is for our hosted environments is Cohesity

## Recovery Point Objective & Recovery Time Objective

The solution has been designed to deliver Recovery Point Objective (RPO) and Recovery Time Objective (RTO) using the following definitions:

- RPO is the maximum time period in which data might be lost.
- RTO is the duration of working time within which data should be restored after a disaster. This time starts from when a support call is logged with Access.

Standard RPO & RTO times are as follows:

- SQL Server
  - 15 minute RPO
  - 12 Hour RTO
- Non-SQL Server
  - 24 Hour RPO
  - 12 Hour RTO

## Retention for backups

## SQL Workloads

**NON-SQL Workloads** - standard retention for non-sql data/servers is 30days with our RTO & RPO

Retention for backups:

| | |
|---|---|
| 15-min SQL | 28 days |
| Daily | 28 days |
| Weekly | 3 months |
| Monthly | 6 months[1] |

[1] Payroll Data is retained for 5 years this is based on database naming conventions. Some products also deviate from Monthly 6 months. Additional information can be requestioned from our DBA Team.

Backups will be deleted upon client request following termination of contract, otherwise they will be aged out via retention policies.

Standard Restore Testing - we undertake restores automatically on a weekly basis via an automated process to a separate server to ensure that the backup is consistent and valid on restore.

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# 7. Business Continuity

The Access Group's full and most up to date business continuity plan can be requested by emailing buyer.enablement@theaccessgroup.com

# 8. Accreditations and Awards

As a business we have the following accreditations and awards:

- ISO Accreditation
  - ISO 27001 - accredited through our commitment to best practice with regards to our security controls.
  - ISO 27701 - an international standard that provides a framework for managing privacy information, specifically focusing on Personally Identifiable Information (PII), a privacy extension to ISO 27001.
  - ISO 42001[2] - this is an international standard that provides a framework for organisations to establish, implement, maintain and continually improve an Artificial Intelligence Management System (AIMS). It helps organisations ensure responsible and ethical AI development, deployment and operation. The standard focuses on risk management, transparency, accountability and alignment with ethical principles throughout the AI lifecycle.
  - Cyber Essentials: a UK government-backed and industry-supported certification scheme that helps organisations of all sizes protect themselves from common cyber threats by implementing basic technical controls
- Payroll Assurance Scheme - Our Payroll Services Division (APS) are CIPP *no recommendations we can make; The Access Payroll Team pass with flying colours!"*
- HM Revenue & Customs - Access payroll services meet the requirements of the published HM Revenue & Customs Payroll Standard and the relevant sections of HM Revenue & Customs Quality Standard. It incorporates online filing and supports Extra Pay Frequencies, Directors' NI, Contracted Out and Net Pension Deductions.

vards

- Fosway Group, Core Leader for Digital Learning 2025
- Fosway Group, Core Leader for Learning Systems 2025
- Tech UK, President's Award Winner 2024
- PayTech Awards Winner 2024
- UK IT Industry Awards, Vendor of the Year Award Winner 2023
- UK Tech Awards, UK Tech Company of the Year Award Winner 2023
- UK Business Tech Awards, Tech Company of the Year Award Winner 2023
- Great British Care Awards, Care Innovator Award 2022
- Business Awards 2022 Large Business of the year
- Kofax UK & Ireland, Outstanding Growth Award 2022
- UK Tech deal of the year, UK Tech Awards 2022
- VEEAM Best VCSP Partner of the year 2022

[2] We are one of the first companies in the UK to be accredited ensuring responsible use of AI

# 9. Development Life Cycle

As one of our core products Access Paycircle has a detailed roadmap of improvements driven both by customers and by our own roadmap. Ongoing development against each application is supported by a development plan that has high levels of details for the next 3 months including user stories. Beyond that top line plans are in place by quarter for a further 12 month with a list of additional options waiting to be added.

New functionality is added on a regular basis (usually every quarter) with all companies benefitting at the same time.

# 10. Technical Requirements

**Paycircle Web Application**

**Operating System:**

- Windows 10 and above
- macOS 10.15 and above

**Certified Browsers:**

- Microsoft Edge (latest versions)
- Mozilla Firefox (latest versions)
- Google Chrome (latest versions)
- Safari (latest versions on macOS)

**Access Protocols:**

- Access Identity with 2FA and SSO (Okta and Azure supported)
- Role-based profiles with granular permissions

**Mobile Application**

**Availability:**

- No native mobile app is provided for Paycircle.

**Security and Compliance**

**Data Encryption:**

- In Transit: HTTPS using the latest TLS version.
- At Rest: Azure Transparent Data Encryption (TDE).

**Password Policy:**

- Minimum 12 characters, including uppercase, lowercase, number, and special character.
- Configurable expiry and lockout settings.

**Audit and Logging:**

- All actions recorded and auditable.
- Logs stored in Microsoft SIEM with custom application logging.

**Timeout: Automatic session timeout after 30 minutes of inactivity.**

**Hosting and Infrastructure**

- Cloud Provider: Microsoft Azure.
- Data Centre Locations: UK South, Netherlands, Ireland.
- Firewall & IDS: Azure Firewall and Cloudflare WAF; standard IDS.
- Backup: Managed by Microsoft; encrypted and stored in UK, Netherlands, Ireland.
- RPO/RTO: RPO – 5 minutes; RTO – 1 hour.

- External Systems Supported: Xero, BACS, HMRC, Pension providers.
- Email Services: SendGrid (Microsoft Azure), routed via USA with EU SCCs and UK IDTA safeguards.

**Integration and Outputs**

- Data Retrieval: Self-serve via reporting system in Excel, CSV, or PDF.
- Data Deletion/Anonymisation: Achieved through scripts and procedures by Access technical support.

**Exit Arrangements**

## 11. Service Constraints

Maintenance windows as detailed above are minimal with the service so that we use all reasonable efforts to ensure that the SaaS Services are available for 99.70% of each calendar month.

As a true SaaS solution customisation is not available although the product can be configured to meet all standard set up requirements.