Pay run Auto-approve

Pay runs · https://paiyroll.com/kb/pay-run-auto-approve/

Follow this article on how to set up auto-approval of **scheduled** pay runs. Note that any **custom** or **on-demand** pay
runs are never auto-approved, and their handling is the administrator's responsibility.

There are three modes of operation for Pay run approval:

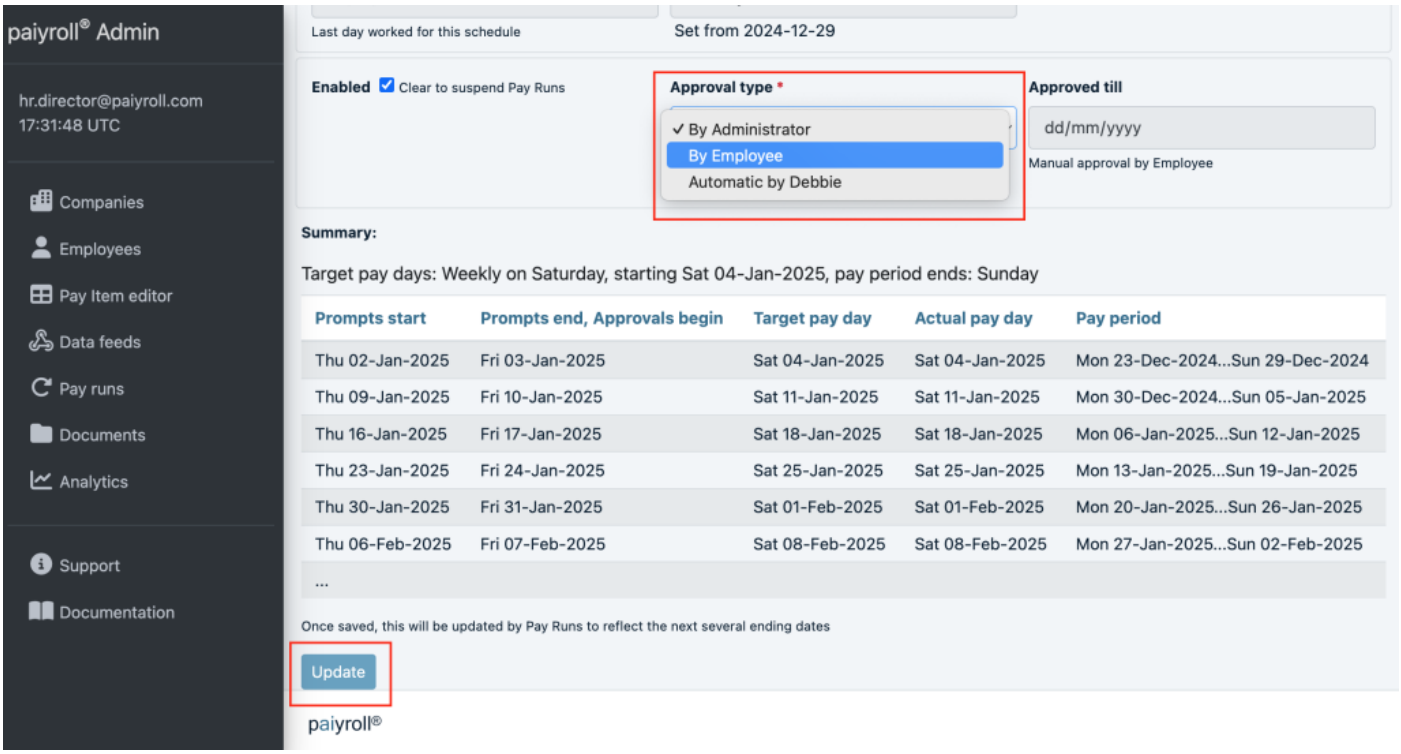
1. **By Administrator** is the default and requires an administrator to press the pay run **Approve** button.
2. **By Privileged Employee** will require a **Privileged employee** to Approve the pay run in their My tasks app view.
   - Assuming timely approval, Debbie will complete the pay run in the finalisation window.
3. **Automatic by Debbie** will auto-approve the pay run with no manual intervention required.
   - Debbie will complete the pay run in the finalisation window.

Regardless of the approval type set, the administrator is always able to approve any pay run with the **Approve** button

Setup

Auto-approve for pay runs is set on the pay schedule: **Setup** > **Pay Schedules** and **Update** the relevant schedule.

Select the **Approval type** required and c**lick Update**:



Note the summary table dates, which control when various steps occur - these are Prompts start, Prompts end, Approvals begin, as well as **Target payday** and **Actual payday**

Privileged Employee Approval

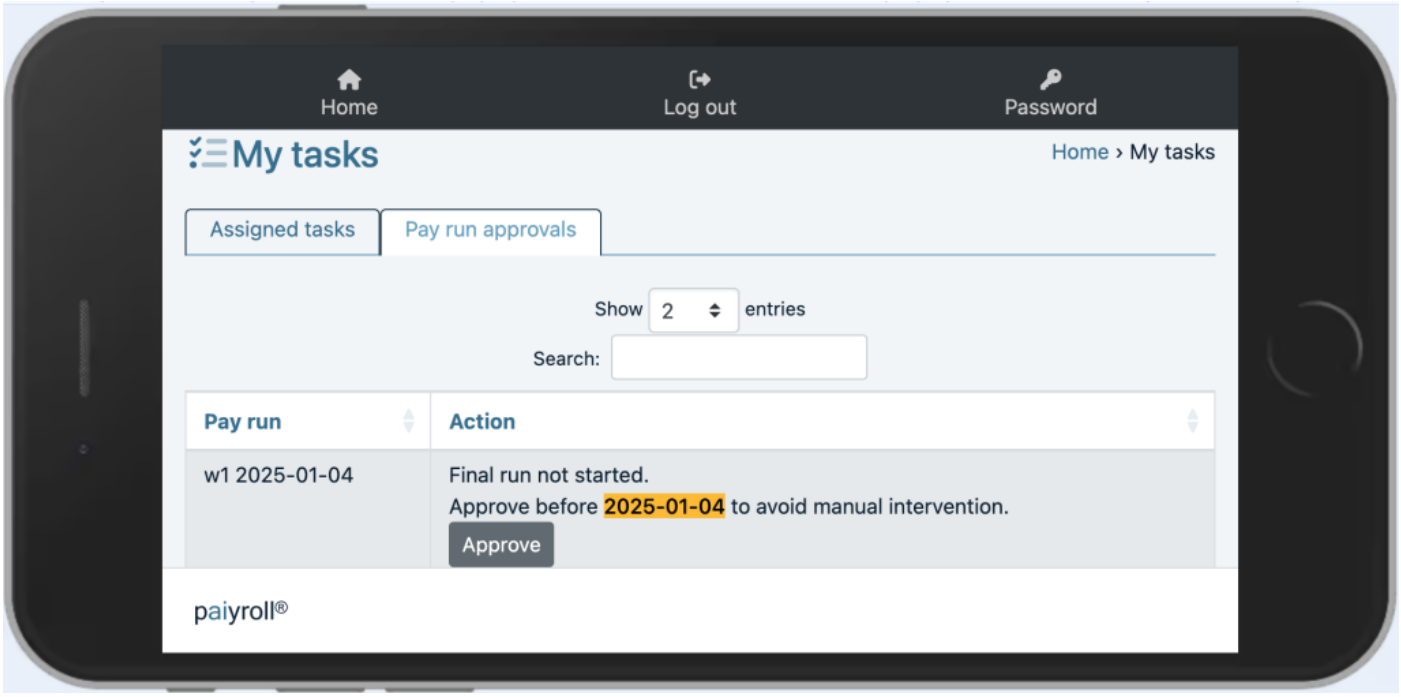
Administrator view

If you set the pay run schedule approval type to **Privileged Employee,** the administrator will also see an **Approved till** date field. The Approved till date works as follows:

1. Usually, you will not enter a date
2. After a privileged employee has approved a pay run, this field will show the approved pay run date
3. Cancel a prior approval by clearing the date
4. Exceptional pre-approval: You can also set a future date, e.g. in case a privileged employee will be absent for a period and you wish to pre-approve on their behalf; noting a future date could include multiple future pay runs; after this date, usual privileged employee approval resumes

Privileged employee mobile View

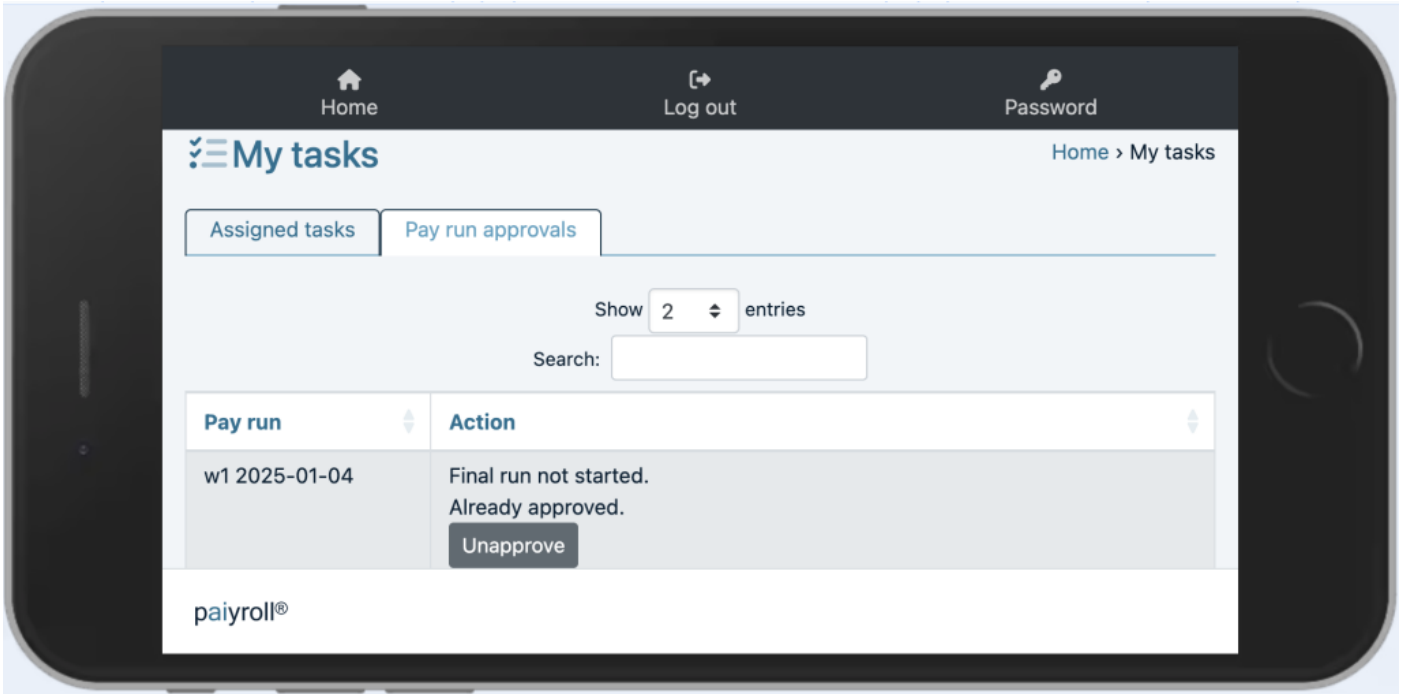
Privileged employees will see a new **Approve** button in **My tasks**:



Each approval is valid up to the date shown and will be remembered once. Therefore, the privileged employee will need to approve each pay run individually.

The pay run is then marked for approval by Payroll Debbie for the appropriate date.

Before that date, the privileged employee can also **Unapprove** the pay run if required:



Operation

During the pay schedule, the following automation will occur:

Task	"From" date	"To" date	Example dates	Notes
Tax coding notices	Prompts start	Prompts end (1-day before Approvals begin)	7th - 14th	Uses GB HMRC DPS Data- feed
Pay run **redo**	Approvals begin	1-day before Actual payday	15th - 26th, typically 15th	
Review **documents** and/or Privileged Employee **approval**	Visible by employees and privileged employees			Accessed by self-service
Pay run **approval** (finalisation)	1-day before Actual pay day	Actual payday	27st - 28th	Auto Submit **FPS**, **EPS** Auto Submit API **pension** report Auto post API **bookkeeping** journal
Next **interim** pay run	Immediately after pay run approval if all reports are completed successfully			Administrator may need to handle any exceptions e.g. HMRC unavailable

My Dashboards

The status of all pay runs can be viewed in **My dashboards > Pay Run Calendar**:

Pay Run Calendar

Home › My dashboards › Pay Run Calendar

Pay Schedule activity due in the next 7 days.

Show 25 entries

Search:

Schedule	Current actual_t	Current blockers	Current pay run	Next prompt window
America Corporation:m1	2021-04-28 (1183 days ago)	Previous pay run done Data feeds done Reports done	NEW Payrun.bpmn#60838 LATE	2021-05-14 (1167 days ago)
Germany Corporation:m1	2021-09-28 (1030 days ago)	Previous pay run done Data feeds done Reports done	NEW Payrun.bpmn#60839 LATE	2021-10-14 (1014 days ago)
Japan Ltd:m1	2024-03-31 (115 days ago)	Previous pay run done Data feeds done Reports done	LATE	2024-04-25 (90 days ago)
Advanced Mechanics:w1, auto-approve	2024-07-26 (in 2 days)	Previous pay run done Data feeds done Reports done	OTHER Payrun.bpmn#335024	2024-07-31 (in 7 days) NOT-RUN Data feeds
Advanced Mechanics:m1	2024-07-28 (in 4 days)	OTHER Payrun.bpmn#335024 Data feeds done Reports done	OTHER Payrun.bpmn#334964	2024-07-22 (2 days ago)