



HALO EMPLOYER · RESOURCE GUIDE

Changes and support

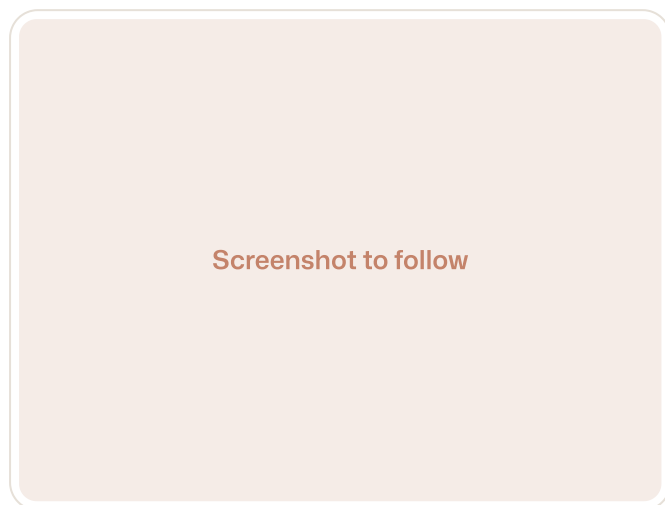
Employee details and childcare arrangements can change over time. This guide explains the updates you can make in the Halo employer portal, what happens next and when you also need to update payroll.

When an employee's salary changes

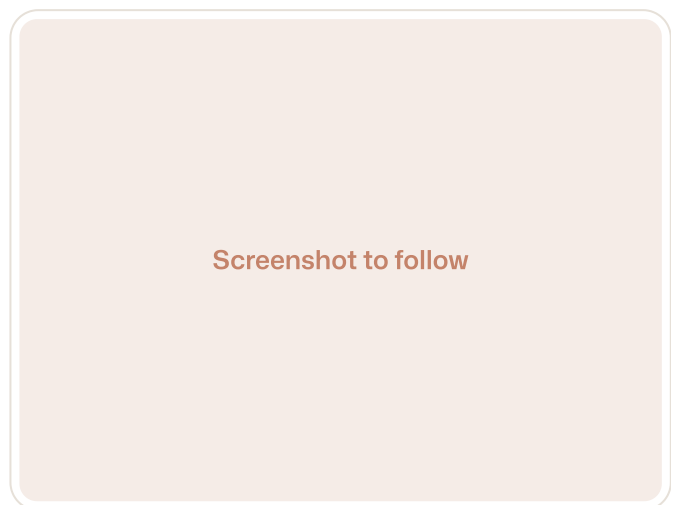
Keep the employee's salary in Halo up to date so their arrangement continues to use the correct salary information.

1. Open **Employees** and select the employee.
2. Select the edit icon beside **Salary Level**.
3. Enter the new annual salary and the date it takes effect.
4. Save the change.
5. Make the corresponding salary change in your payroll software from the same effective date.

Check that the employee's revised salary, after their Halo contribution and any other deductions, remains above the applicable National Minimum Wage or National Living Wage.



Open the employee's profile to review their current salary.



Enter the revised annual salary and the date it takes effect.

When the nursery fee or monthly contribution changes

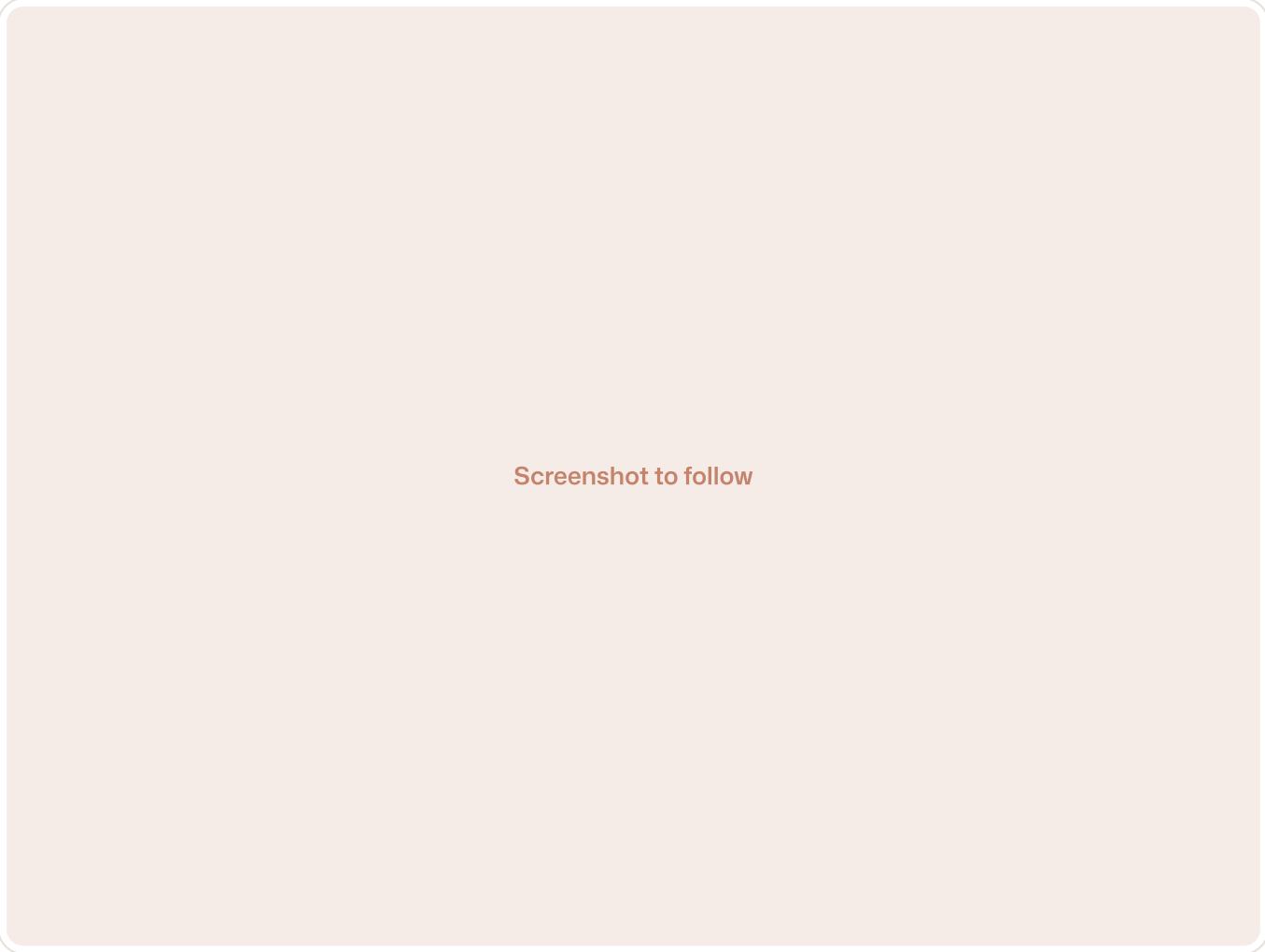
A fee change can be started by either the employer or the nursery. Do not apply the new contribution through payroll until the change has completed the required approval process.

If you update the fee

1. Open **Arrangements** and select the relevant arrangement.

2. Choose **Edit**.
3. Enter the new nursery fee and monthly Halo contribution.
4. Check the other arrangement details and save the change.

The revised arrangement must then be approved again by the employer and nursery, and the employee must sign a new contract addendum.



Screenshot to follow

Update the fee and contribution from the arrangement details.

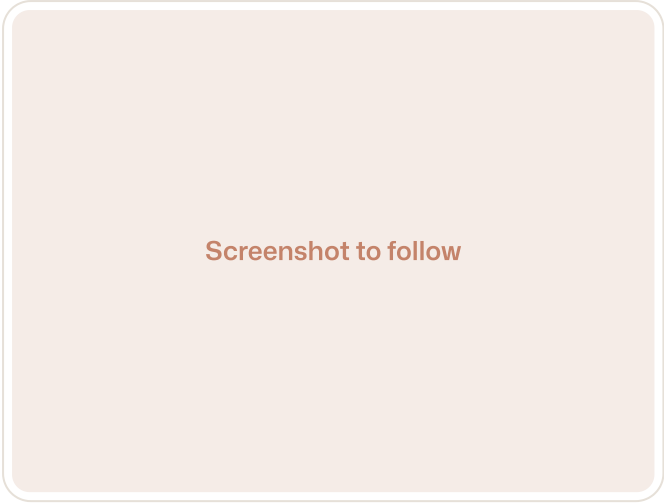
If the nursery proposes a fee change

Halo will email you when the nursery proposes a new monthly fee.

1. Confirm the proposed amount and effective date with the employee.
2. Open the arrangement in your employer portal.
3. Review the nursery's proposed fee, effective date and reason.
4. Choose **Accept New Fee** or **Reject**.

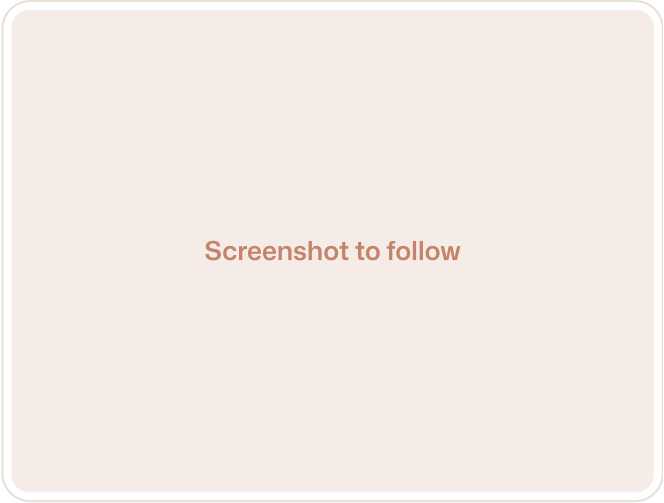
If you accept the proposal, the nursery will be notified and the employee will be asked to sign a new contract addendum.

Continue using the existing contribution until the revised arrangement is fully approved. Once the change becomes active, update payroll from the confirmed effective date and check that future nursery invoices match the new monthly contribution.



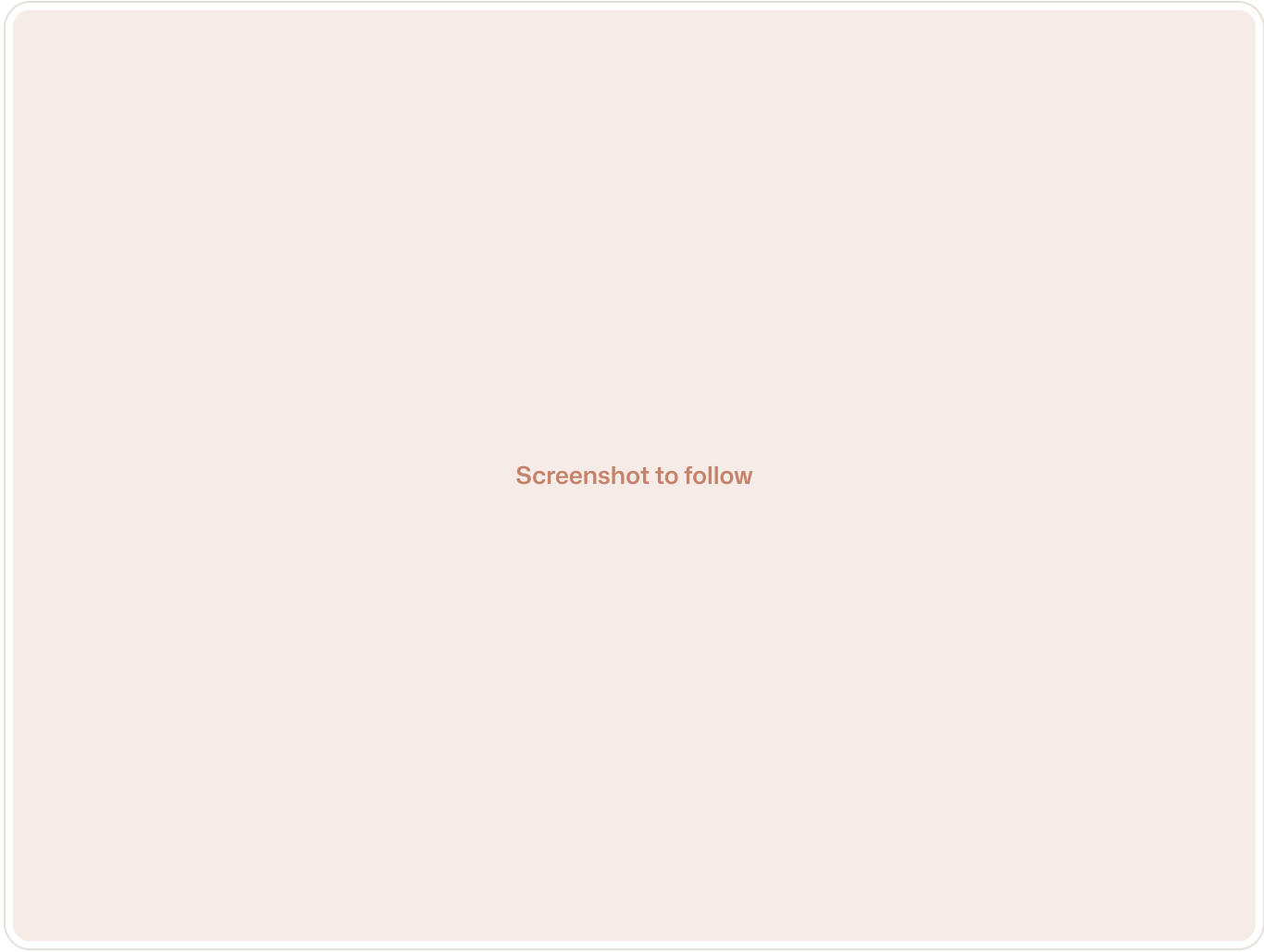
Screenshot to follow

The nursery enters the proposed fee, effective date and reason.



Screenshot to follow

Halo emails the employer when the proposal is ready to review.



Screenshot to follow

Review the proposed fee in the arrangement and accept or reject it.

When an employee leaves the company

1. Open **Employees** and select the employee.
2. Choose **Mark as No Longer at Company**.
3. Enter the reason and effective date, then confirm the change.
4. Open **Arrangements** and confirm that the employee's arrangement has been cancelled.
If a separate cancellation is required, select the arrangement, choose **Cancel Arrangement** and enter the reason.
5. Stop the Halo contribution in payroll from the appropriate pay period and complete any final nursery payment due.

The employee's portal access and benefits will be deactivated. Halo will notify the employee and nursery by email.

Screenshot to follow

Screenshot to follow

Select “Mark as No Longer at Company” from the employee's profile.

If required, cancel the arrangement and record the reason.

Screenshot to follow

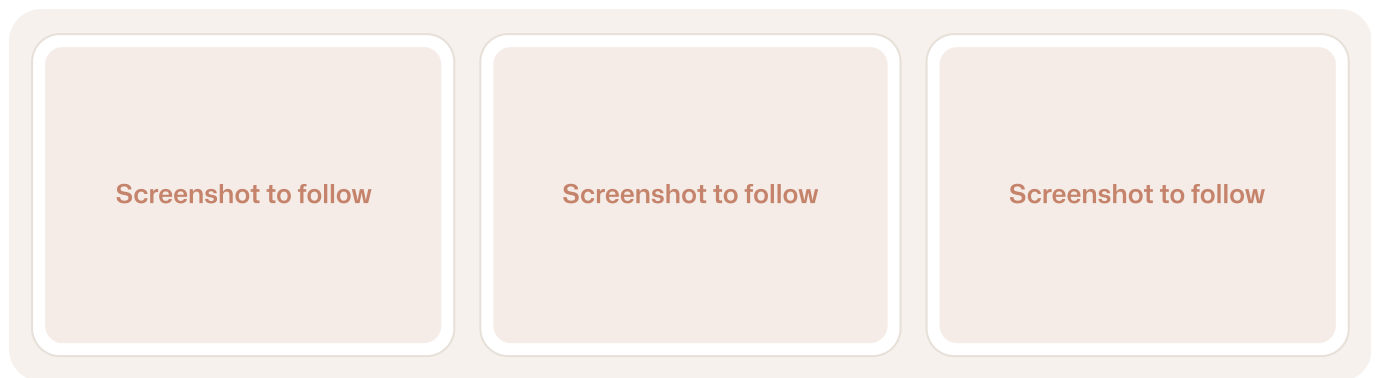
Enter the reason for leaving and the effective date.

Updating company or billing details

Open **Settings**, then select **Company** to review and update your:

- company details;
- bank and billing information;
- Direct Debit details; and
- payroll settings.

Keep this information current so Halo uses the correct details for billing, fee collection and payroll scheduling.



Use the Company section in Settings to manage your company, billing and payroll information.

Adding a team member

Open **Settings** and select **Team**. Enter your colleague's email address, add their name if required and choose their access level:

- **Member** – can view arrangement progress but cannot access pay data, billing or settings.
- **Admin** – has full access to billing, employees, settings and team management.

Select **Send Invitation**. Invitations expire after seven days.

Screenshot to follow

Enter your colleague's details and choose the appropriate access level.

Before confirming a change

Check before you confirm

- ☐ You have selected the correct employee and arrangement.
- ☐ The effective date works with your payroll schedule.
- ☐ Payroll has been updated where required.
- ☐ A revised arrangement has completed all required approvals.
- ☐ Any revised or final nursery invoice has been checked.

Getting help

If you are unsure how to make a change, or the change cannot be completed in the portal, contact Halo before updating payroll.

Include the employee's name, arrangement reference, change required and proposed effective date so the team can help you quickly.

Email hello@halown.com