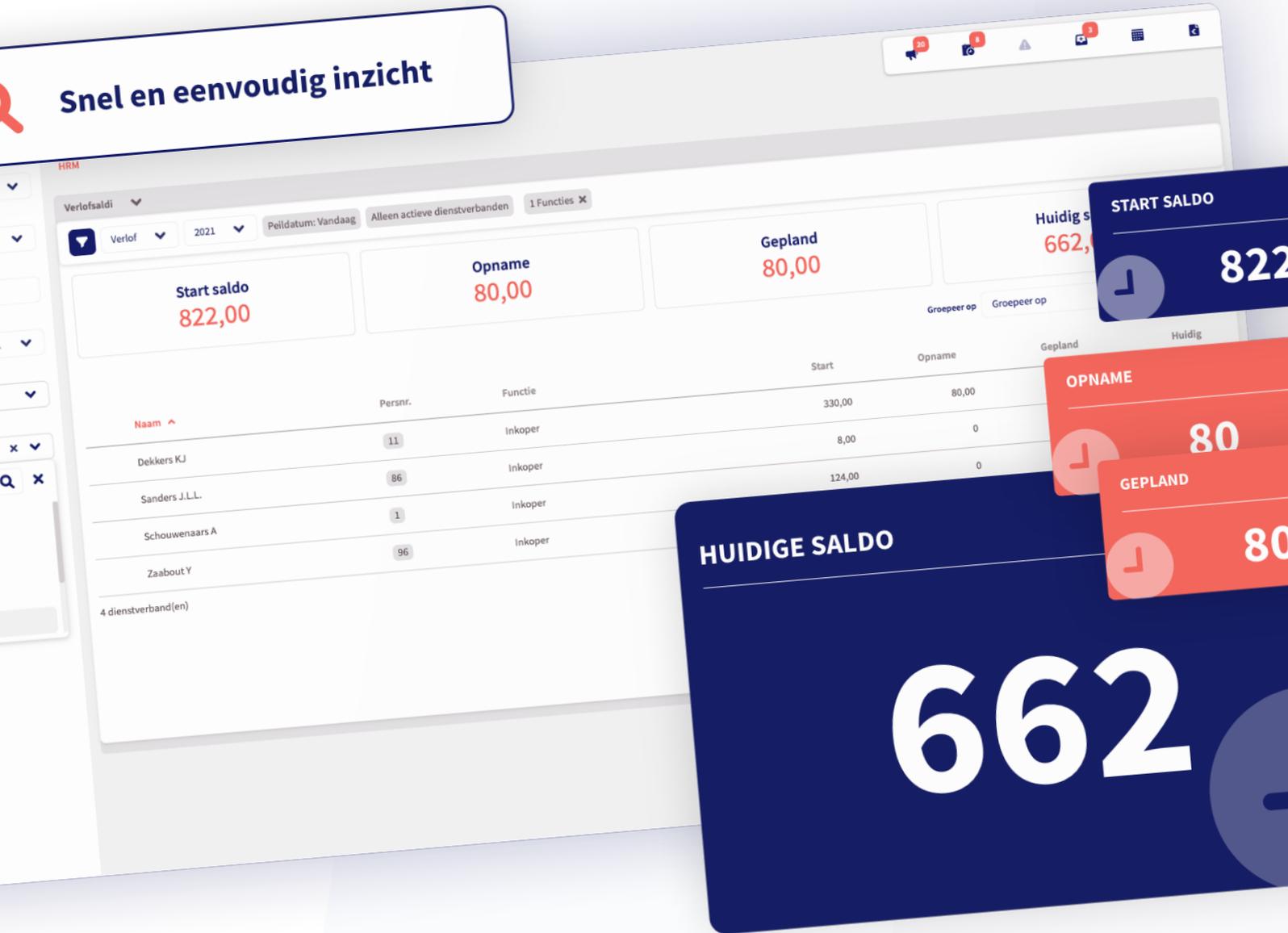


Snel en eenvoudig inzicht



# Loket.nl User's Guide

Discover the application

# Loket.nl User's Guide

In this guide we will take you through the operation of Loket.nl. We will run through the basics that you as an employer want to know.

## Log in

Logging in to Loket.nl is very easy. You navigate to: <https://login.loket.nl/> and log in with your username and password. Do you have a shortcut to the URL that still links to Loket.nl Classic or did you have this URL saved as a favourite? Then change the old URL to: <https://login.loket.nl>

Something on the Loket.nl login page immediately catches your eye: the captcha is missing. This makes it even easier and quicker for you as a user to log in. It goes without saying that this was realised without loss of safety standards. We are still working together with Trust Guard, which ensures the security and robustness of the application as you are used to from Loket.nl.



Username



[Forgot your username?](#)

Remember username

OR



### ***Forgot your username?***

Have you, for whatever reason, forgotten your username? Then on the login page of Locket.nl, you can select the option to indicate that you have forgotten your username. When you click on it you will see the following screen. If you provide your registered email address, an email with your username will be sent to this email address.

#### **Request username**

We'll send you an email with your username.

Email address

### ***Forgotten your password?***

In order to log in, you must enter your password after you have entered your username. If you cannot remember your password, click on *Forgot your password?* in this window. You will then see the below screen. If you enter your username, an email will be sent to the related email address, containing instructions on how to choose a new password.

#### **Request password**

If the username is known, we'll send you an email with instructions to reset your password.

Username

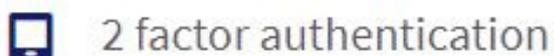
## Settings

After logging in to Loket.nl, you will find the cogwheel icon at the bottom left with the description *Settings*.



If you click on this you can change a number of settings. These include the following:

- *Languages*: Dutch, English or German.
- *Explanation*: This will open an additional tab in your browser containing the Loket.nl helpdesk portal.
- *Loket.nl Classic*: This allows you to easily switch back to the previous version of Loket.nl.
- *2 factor authentication*: This allows you to add additional security to your account by means of an extra verification code



## Navigating in Loket.nl

The design of the latest Loket.nl is completely responsive. This means that the layout of the screen automatically adapts to the type of screen you are using. Whether you are using a laptop, tablet or mobile phone: Loket.nl can be used on any device.

### Structure:

Loket.nl uses two types of menu items. The main menus are on the left of the screen. The main menu has several submenus. See the example below of the main menu *Payroll*, including the submenus *Payroll runs*, *Tax returns*, and *Journal runs*.



EMPLOYER  
Cursus BV (99001)

Start

Dashboard

Payroll

HRM

Reports

Employment conditions

Company details

Management

Home / Cursus BV (99001) / ... / Payroll runs

Payroll runs Tax returns Journal runs

### Approved payroll runs

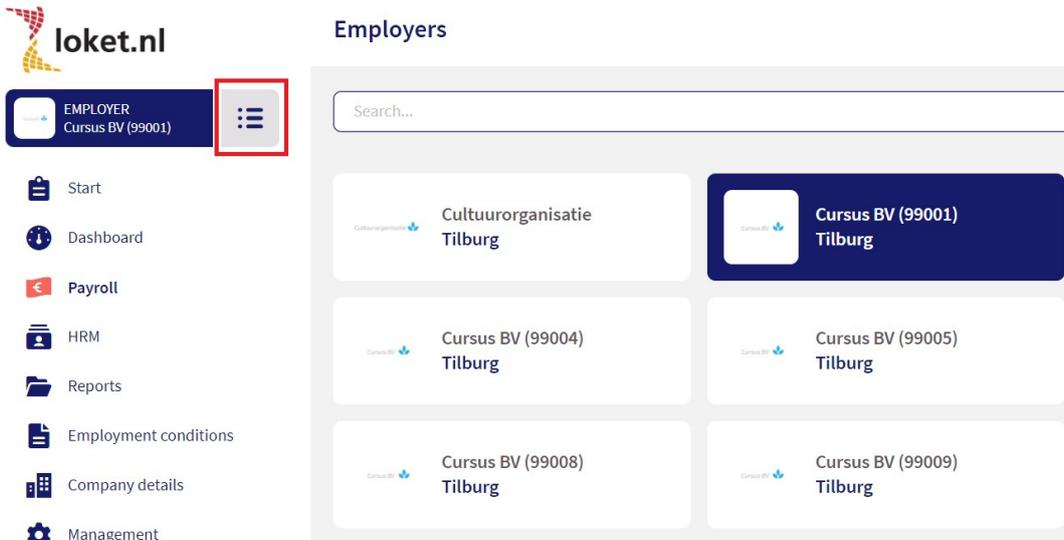
Seq.No.apprd. ▾	PR period ▾	Commanded ▾
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	
3	2021-03	10-02-2021 14:4...
2	2021-02	10-02-2021 14:3...
1	2021-01	10-02-2021 13:5...
12	2020-12	09-02-2021 14:3...

### Selection screens:

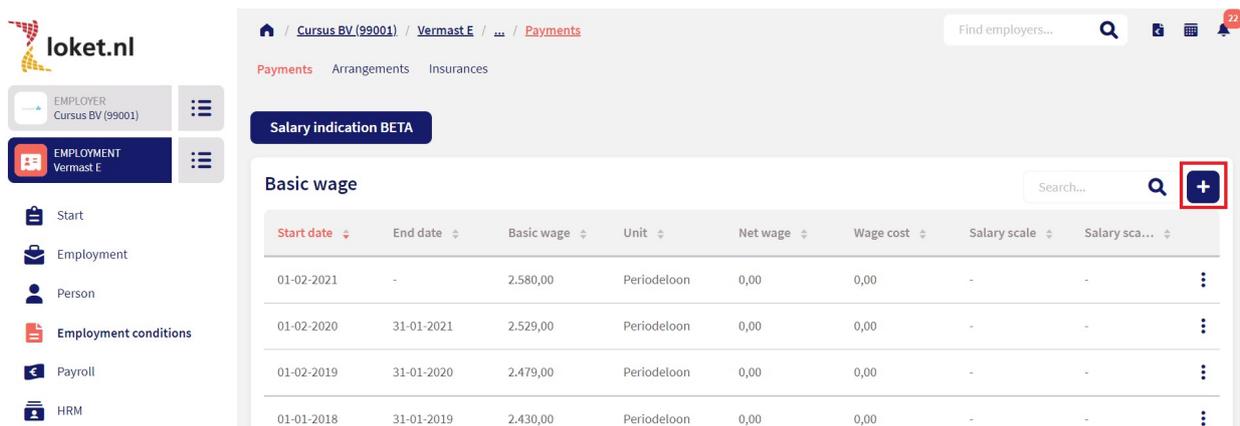
There are two different screens within Loket.nl:

- Selection screens
- Entry screens

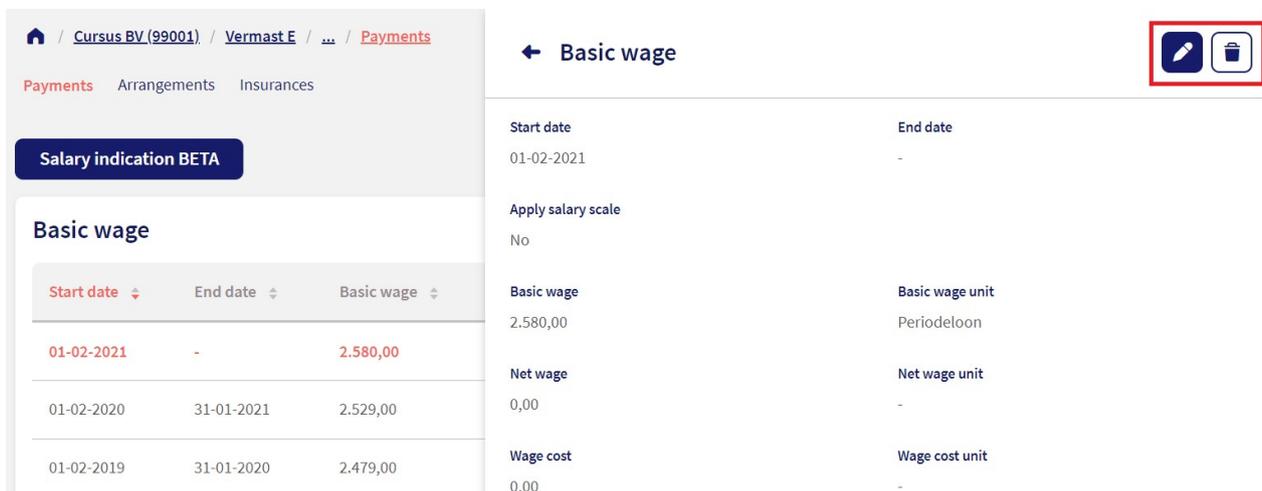
An example of the selection screen is the possibility to select an employer.



Do you want to add or modify data? Entry screens offer the possibility of adding or modifying data. With the plus sign you can add (or enter) data.



If you want to modify data, click on an existing line and select modify. Do you want to delete a line previously entered? Then click on the bin.

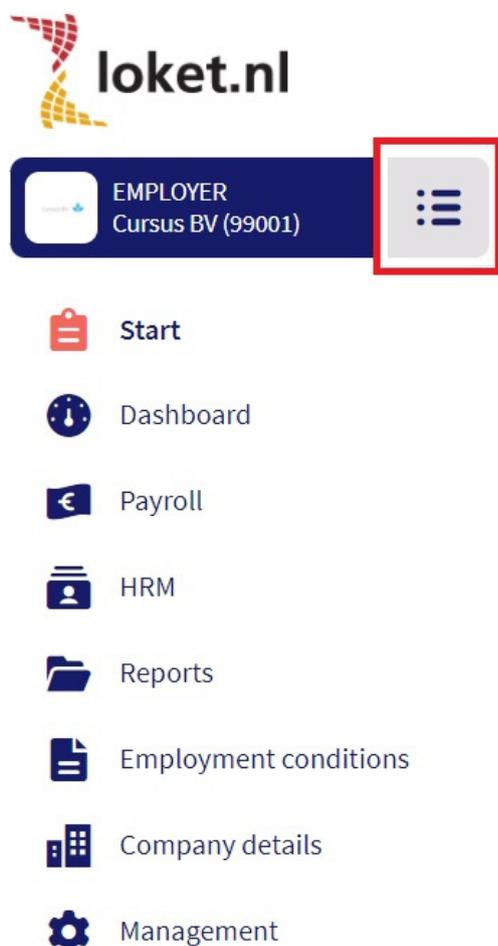


### Navigation buttons:

Do you want to navigate between employees and maintain the same screen? No problem. You can do this by using the navigation buttons next to the employee (see the screenshot below). Do you have access to multiple employers? Then you can also navigate between employers with the navigation buttons.



Depending on the rights and products you have access to, you can use the buttons on the side to navigate. The selected employer is at the top. Do you have access to multiple employers? Then you can select them by clicking on the three bars.



## Filtering:

A new feature in Loket.nl is the possibility to filter employment contracts by active employment contract/inactive employment contract and/or to filter by department. This filtering is currently applied to the *Browser variable data* and the *Calendar*. Of course we will offer more fields for filtering in the future.

## Employees

**Attention!** The employment filter relates to multiple functionalities within Loket.

Search...

Show closed employments

Departments

All

Administratie

Inkoop

Automatisering

Directie

Verkoop

**Bakker JFW de**  
99001 - Cursus BV 99001 (3)

**Bosma AT**  
99001 - Cursus BV 99001 (1)

**Dekkers KJ**  
99001 - Cursus BV 99001 (1)

**Johnson M**  
99001 - Cursus BV 99001 (1)

Is there a filter active? A dot will then be shown in the *list of employment contracts* button.



## Overview page

The overview page of the selected employer is also called the start page of the employer. The navigation buttons are listed on the left and various items, such as new employee, payroll processing status, and birthdays are listed on the right of this start page. We would like to take you through the items visible on the right of the start page of the employer first. Then we will zoom in on the navigation buttons on the left.

### **Right side of the start page**

#### ***New employee:***

Use this button to go through the new employee wizard. In six steps you can easily add an employee.



#### ***Export data:***

Do you want to be able to consult many data? And to be able to filter many data? To create your own customised export? Then we have the option *Export Data* for you. This option will ensure more depth and breadth for further HR analysis in the future. Through *Export data* you can make a filter of the personal data of the employee you wish to view and create an export file of this data.

## Export data

Select the data you want to export below. You can then choose to download it as a CSV or as an Excel file.

Personal data 

General 

Personal details 

Address 

Deviating postal address 

Contact 

Identification 

### **Download employer file:**

On the overview page there is the option for the employer to click on the *Download employer file* button. If you, as a user, have the right to *Download employer data* and to use the product *Download employer data(1060)*, you are permitted to retrieve a file containing many employer and employment contract data. This is useful as input for example on your dashboard. Use the option *Submit request* to start downloading the data for the selected year. As the overview may contain many data, this process will not be completed immediately. Your request is being processed, please continue with other business in Locket.nl. As soon as the download is completed you as a user will receive an email. You can then download the files in Locket.nl. After you have selected *Download*, a file with extension **.rar** will appear. You can open this file with a ZIP programme and a number of CSV files will appear based on subject. From here you can use all data.

### **Download file employer data**

There are no downloads available

Submit new request 

Request download for year

2021

**Submit request**

### ***Last status of payroll processes:***

The status of the last payroll run, tax return, pension declaration and exported journal run are located further right on the screen. Just push the button to go to these items. The overviews and downloads can also be downloaded from this page.

Last approved



2021-03



Period	Approved by
2021-03 01-03-2021 through 31-...	Superuser, A
<b>Approval date</b>	<b>Available ESS</b>
10-02-2021 14:42:24	10-02-2021

#### Downloads

- [Payslips](#)
- [Wage sheet](#)

Under the heading *Tax returns* you can now also very easily pay the tax return with iDEAL.

Period	Payment reference
2021-02 01-02-2021 through 28-...	9810666896101020
<b>Total tax return period</b>	<b>IBAN</b>
25.216,00	NL86INGB0002445588
<b>Total correction</b>	<b>In the name of</b>
0,00	tnv belastingdienst Apeldoorn
<b>Total tax return</b>	
25.216,00	

#### Downloads

- [Message](#)
- [Summary](#)
- [SEPA](#)

**Pay with iDEAL**

### **Birthday widget and Absence widget:**

You will also find the *Birthday widget* and *Absence widget* on this page. Did you know that it is also possible to have a gift (such as flowers or chocolates) delivered automatically to the employee on his or her birthday? This is possible because Locket.nl and Fleurtjedag are linked. The accounting firm or administration office can provide more information about this.

#### Birthdays

There are 0 notifications selected. **Select all 11 notifications.**

<input type="checkbox"/>	Name	Birthday	Age	
<input type="checkbox"/>	 Remmers J...	27-07-2021	61 Jaar	▼
<input type="checkbox"/>	 Kok JFW de	30-06-2021	44 Jaar	▼
<input type="checkbox"/>	 Braakman ...	30-04-2021	41 Jaar	▼

« < 1 2 3 > »

## Navigation buttons on the left side of the home page

### **Payroll runs:**

The *Payroll runs* tab takes you to the employer's payroll processing area. Here you will find the wage carousel, the already approved payroll runs, tax returns, and the exported journal runs.

Via the *Payroll runs* tab you can use a bell in the wage carousel to indicate that you have finished making changes for a specific period of time. In this way you can let the payroll administrator know that all data are ready for payroll processing. This can also be done for the previous period for which payment was already made. After all, additional processing may still be required.

The screenshot shows the 'Payroll runs' interface for 'Cursus BV (99001)'. The breadcrumb trail is 'Home / Cursus BV (99001) / ... / Payroll runs'. A search bar 'Find employers...' is in the top right. The 'Administration' section shows 'Clientnr: 99001'. The 'Period' dropdown is set to '2021 - 3 (1 mrt. 2021 through 31 mrt. 2021)'. There are three main cards for periods 2021-2, 2021-3, and 2021-4. Each card has a 'Payroll' and 'Tax return' section. The 2021-3 'Payroll' section has a red box around a bell icon. The 2021-2 'Payroll' section has a green checkmark and the text 'The payroll run for this period has been approved.' The 2021-3 'Payroll' section has a green checkmark and the text 'The payroll run for this period has been approved.' The 2021-4 'Payroll' section has a bell icon and the text 'The payroll run for this period has not yet started.' Each 'Payroll' section has a 'Start' button. The 2021-2 'Tax return' section has a green checkmark and the text 'The payroll tax return for this period has been approved and sent.' It also shows 'Total tax return: 25.216,00' and 'Deadline of payment: 31 mrt. 2021' and a 'Pay with iDEAL' button. The 2021-3 'Tax return' section has the text 'The payroll tax return for this period has not yet started.' and a 'Start' button. The 2021-4 'Tax return' section has the text 'The payroll tax return for this period has not yet started.'

As soon as you click on this bell, the screen displayed in the below screen will appear. In this screen an email address can be entered or a default email address will be shown. Your accountancy firm or administration office has more than likely already entered a default email address for you here. Enter additional comments in the *Comment* field. This comment will then also be added to the corresponding email to be sent to the accountancy firm or administration office.

### Payroll run for 2021 - 3 can start



Send a signal to the payroll administrator to start the payroll of 2021 - 3

Email address recipient

salaris@mijnadministratiekantoor.nl

Comment

De mutaties voor deze periode zitten er weer in.  
Graag extra aandacht voor nieuwe werknemer Minun!

Cancel

Send

### HRM:

You can find the *Employer file, Documentation* (or templates for being able to automatically generate documents) and *Draft employees* under *HRM*.

### Reports:

We currently have a *Basic* report on leave, but we will continue to add more reports in the future. The term *Basic* has nothing to do with the skill of the user, but with the options and possibilities of the report. The report on leave is located under *Reports*. When you have put on your filter you can create an export in CSV or in Excel. This way you can modify the files even more.

The screenshot shows the Locket.nl interface for HRM. The main content area displays the 'Leave balances' report for Cursus BV (99001). The report includes a summary table with the following data:

Start balance	Withdrawal	Scheduled	Current balance
9.107,52	0	0	9.107,52

Below the summary table, there is a table with columns for Name, Emplo..., Function, Start, Withdr..., Schedu..., and Current. The first row shows the following data:

Name	Emplo...	Function	Start	Withdr...	Schedu...	Current
Bakker JFW de	138	Salarisadviseur	240,00	0	0	240,00

### **Terms of employment:**

Under *Terms of employment* you can record the options for *Provisions* and create *Leave arrangements*.

### **Company details:**

In *Company details* you can view all of your company's contact details and modify them if you have authority to do so.

### **Management:**

In *Management* you can manage the different tables, manage email texts and view and modify *Workflows* .

Home / [Cursus BV \(99001\)](#) / ... / [Workflows](#) Fil

Tables [Workflows](#) Email texts

### HR Workflow template per event

Event <span>⌵</span>	Employee is allowed to initiate <span>⌵</span>	HR Workflow template for han... <span>⌵</span>
<input type="text" value="Search..."/>	All values <span>⌵</span>	<input type="text" value="Search..."/>
adreswijziging	Yes	Doorvoeren na akkoord werkgever
contactgegevenswijziging	Yes	Direct doorvoeren

## Duty centre

The *Duty centre* is located top right in the application. The *Duty centre* contains icons that are also located on the employer start page. Is there an icon with a notification in the *Duty centre*? Then there is a 'task' waiting for you (also called outstanding action), for example, a declaration filed or an outstanding leave request. Below we will take you through all icons of the *Duty centre*.

### What does each icon mean?



This is the button for the outstanding *alerts*. These can be read and addressed here.



The outstanding *leave requests* are located here, they can be approved or rejected here.



The changes initiated by the employee (workflows) are located here.



The *Declarations* can be viewed and addressed here.



With this button you can open the *calendar*. Here you can see who is on leave, sick or working according to the schedule and you can select the period in which you want to see this data. The legend is below the *calendar*.



With this you open the *Browser variable data*. For payroll processing, you can choose to enter the variables for each separate employee. But the *Browser variable data* works much more efficiently. Input is saved intermediately and you can enter all employee variables at once.

The below screenshot shows the screen of the *Browser variable data* in which you can enter variables for each separate employee.

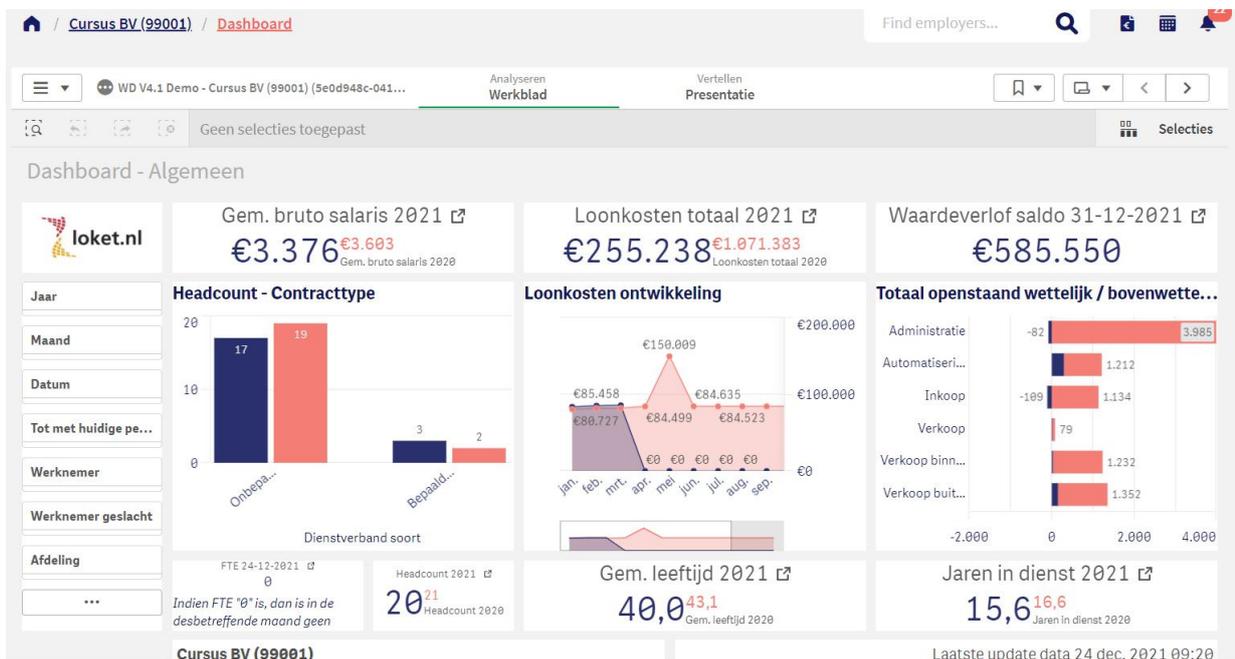
☰ 2021-12-01 - 2021-12-31 ▼ Normale strook Bijzonder tarief strook (W) Variabele gegevens Timmermans BV ▼

Persnr, naam ▼	UREN GEWERKT	UREN OVW 100%	UREN OVW 150%	UREN ZIEK
1 Schouenaars A	=			
3 Kok JFW de				
5 Winter R de				
7 Braakman PKN van				
9 Remmers JFW				
10 Kooten - Boots PKN van				
11 Dekkers KJ				

# HR Dashboard

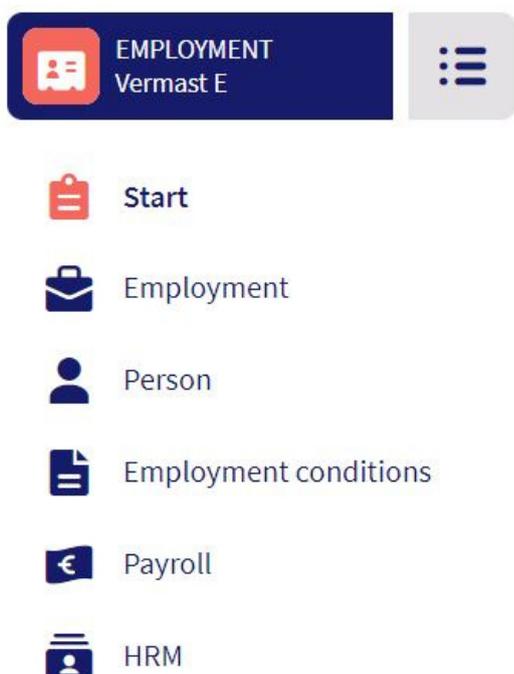
The *HR Dashboard* in Locket.nl provides direct insight into the key KPIs regarding wage and HR. Personnel costs are the highest cost item for many companies, but there remains a lack of insight.

The *HR Dashboard* is a convenient tool that brings together all the important KPIs in this area. This concerns information about labour costs, the value of outstanding leave, but also short, medium and long-term sick leave.



## Employee level (Employment contract level)

The related tabs have been moved from the top of the screen to the left of the menu. The navigation has remained the same as much as possible for ease of use.



### **Overview page:**

On the overview page you will find a collection of the most useful information you would like to be displayed of an employee. For example, this page shows the outstanding actions (signals, leave requests, declarations), the employee's wage development, remaining leave and the option to give the employee access to the Employee Desk. Good to know: nothing will change for the employee as a result of this transition to Loket.nl!

The other tabs are (almost) the same regarding their contents as in Loket.nl Classic. But we have made some smart changes in some places. We are happy to list them for you.

## 1. Benefits and deductions

This screen is located in the *Employment terms* tab . Previously, the screen provided a breakdown of the various benefits and deductions from gross and net wages. In Loket.nl we have put together all benefits on one screen and added convenient filters that allow you to filter out, among other things, closed fixed benefits/deductions.

Benefits and deductions   

Start date ▾	End date ▾	Component ▾	Value ▾	
Bruto inhouding				
01-01-2005	31-12-2011	INH.SPAARLOON	51,08	⋮
Netto betaling				
01-01-2015	-	REPR.KSTN. VR	100,00	⋮

2 item(s)

## 2. Sequence of digital signatures

If you use the digital file in Loket.nl, it is also possible to submit files for digital signature. This is not a new feature, as it was already used within Loket.nl Classic. However, in Loket.nl we have added the option to have the digital signing take place in a specific order. Not all signers are asked to sign at once in this way. See the screenshot on the next page.

## Signature

Enter the details of the persons who must sign the document here. The sign request will be sent to the entered email addresses.

The telephone number is used once to send a verification code. Use this format to enter the telephone number: +31612345678.

Note: start the telephone number with the country code (for example, if it is a Dutch number, start with +31). Digital signing was developed in collaboration with Qwoater and Signrequest.

Number of signatories

1 2 3 4 5 6

Signing order

Complete in order

<div><p><b>Signatory</b></p><p>Name *</p><input type="text" value="Gegevens IA"/><p>Email address *</p><input type="text" value="noreply@loket.nl"/><p>Phone number *</p><input type="text" value="+31612345678"/><p>Order *</p><input type="text" value="First signatory"/></div>	<div><p><b>Signatory</b></p><p>Name *</p><input type="text"/><p>Email address *</p><input type="text"/><p>Phone number *</p><input type="text"/><p>Order *</p><input type="text" value="Last signatory"/></div>
--	---

Cancel

Submit request

### 3. Send signal when adding documents

In Locket.nl you can have a signal (email) sent to the employee when a document is added to his or her file, when a document is added to the Employer's file and when a document is (collectively) generated.

← New file × ✓

Description \*  Year

Category \*

Characteristic  Expiration date

**Send email**  No

**Select files** 0 of 1-10 files selected

Drop files here