



EARLY ADOPTER PROGRAMME · JUNE 2026

Getting started with Oscar

AI employee onboarding for BrightPay

Everything your practice needs to switch Oscar on and run your first automated onboarding — from enabling a client to approving the data — in under 10 minutes.

AUDIENCE

UK practices & bureaus

READING TIME

~ 6 minutes

VERSION

June 2026

STATUS

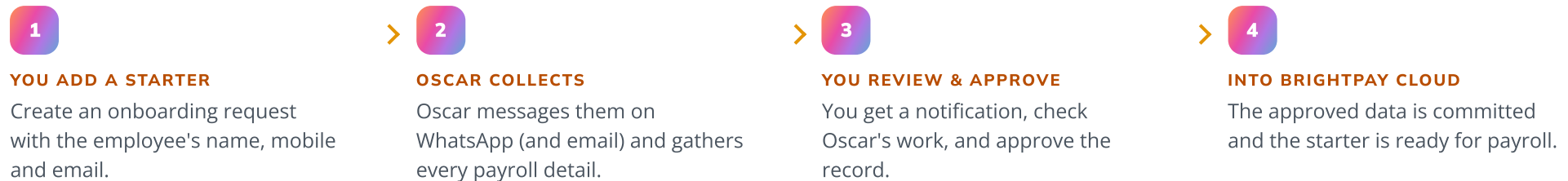
Early Adopter

WHAT YOU'LL NEED

- ✓ BrightPay Cloud access for the relevant client
- ✓ Client Portal permissions configured
- ✓ The new starter's mobile number (with 44 country code)
- ✓ The new starter's email address
- ✓ Basic employment details (job title, start date)

How Oscar works

Oscar reaches out to each new starter directly, collects everything payroll needs through a simple conversation, and hands it back to you to approve. Four moves, start to finish.



YOUR ROLE

Oscar collects the data. You make the decisions. This isn't hands-free automation — it's intelligent assistance with human oversight. Every record passes your approval before it enters payroll.

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Enable Oscar for a client

Oscar is switched on through BrightPay's Client Portal settings. You only need to do this **once per client**.

1 Open Client Portal Settings

In BrightPay, go to **Employer > Client Portal > Settings** for the relevant employer client.

2 Check users are set up

Make sure the people who need access to employer data are added under the **Users** section.

3 Find the Permissions section

Scroll to the **Permissions** panel on the right of the settings screen.

4 Enable Employee Onboarding

Tick **Enable employee onboarding for** to switch Oscar on for this client.

5 Select the permission level

Choose **All Users** or **Super Users Only**, depending on your workflow.

6 Save

Click **Save**. Oscar is now active — users will see **Employee Onboarding** under **Employees**.

CLIENT PORTAL • PERMISSIONS

Client Portal Settings



Enable employee onboarding for

Acme Joinery Ltd



All Users



Super Users Only

💡 TIP

Start with one or two **high-turnover clients** during the EAP. Once you're comfortable, rolling out to more clients takes just minutes per employer.

Choose your onboarding path

Once Oscar is enabled, there are two ways to kick off an onboarding. Pick whichever fits how you and your client work.

A Client Portal

Best when clients manage their own onboarding.

- 1 **Go to Employee Onboarding**
In the Client Portal: **Employees** › **Employee Onboarding** .
- 2 **Start a new request**
Click the **Employee Onboarding** button in the top navigation.
- 3 **Enter the employee's name**
First name and surname, then **Next** .
- 4 **Add contact & role details**
Job title, start date, mobile and email — plus any notes. **Next** .
- 5 **Review and confirm**
Check the summary — especially the mobile number — then **Create Onboarding Request** .
- 6 **Oscar takes over**
WhatsApp and email go out instantly; the request shows as **In Progress** .

B Directly in BrightPay

Best when you're already working in BrightPay.

- 1 **Go to Employee Onboarding**
In BrightPay: **Employees** › **Employee Onboarding** .
- 2 **Start a new request**
Click the blue **Onboard New Employee** button, top right.
- 3 **Enter the employee's name**
First name and surname, then **Next** .
- 4 **Add contact & role details**
Job title, start date, mobile, email and any notes. **Next** .
- 5 **Review and confirm**
Check the summary and click **Create Onboarding Request** — Oscar contacts the employee straight away.

💡 TIP

The completion deadline defaults to **two weeks**. You can change it, edit the start date or email, or resend the invite any time via the **spanner icon** next to the employee's name.

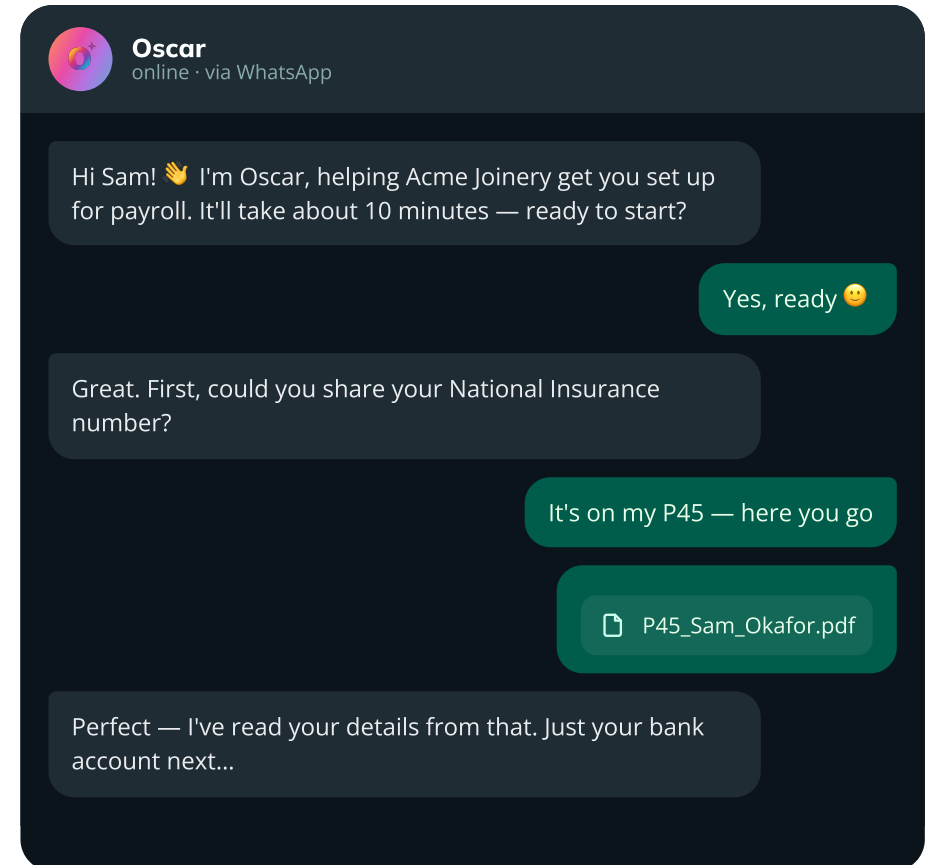
What the new starter sees

The moment you create a request, Oscar takes over — entirely inside WhatsApp, a channel your employee already knows.

-  **A heads-up email.** The employee gets an email letting them know a WhatsApp message from Oscar is on its way.
-  **Oscar introduces himself.** A friendly WhatsApp message explains who he is and what's needed — the whole thing takes under 10 minutes.
-  **A simple conversation.** Step by step, Oscar collects personal details, National Insurance number, bank details and tax information.
-  **Snap a document.** Employees can share a P45, bank statement or utility bill — Oscar reads it and extracts the data for BrightPay.
-  **Secure & GDPR-compliant.** Every response is processed securely and stored in line with GDPR requirements.
-  **Ready for review.** When they finish, your dashboard status changes to [Review Now](#)

TIP

The employee never logs into a portal or fills in a form — everything happens in WhatsApp. That's why completion rates run far higher than traditional onboarding.



Review, approve & manage

Oscar collects the data. You make the decisions. When Oscar finishes, you get a notification and the dashboard status turns to Review Now — your final quality check before anything enters payroll.

1 Open the review

Click **Review Now** next to the employee on the Employee Onboarding dashboard.

2 Check Oscar's work

Review everything collected for accuracy and completeness.

3 Approve

If it's correct, approve — the data is committed to **BrightPay Cloud** and the starter is ready for payroll.

4 Or edit first

Need a change? View the full audit trail and correct any field before approving.

EMPLOYEE ONBOARDING · DASHBOARD

Employee Onboarding

Sam Okafor
Joiner · starts 16 Jun

● Review Now

Priya Shah
Admin · starts 23 Jun

● In Progress



A notification email lands the moment a record is ready to review.

MANAGING LIVE REQUESTS · THE SPANNER ICON



Edit Onboarding Details — change the deadline, start date or email address.



Resend invitation — if the employee missed or deleted the WhatsApp/email.



Cancel — if a request was created in error.

Questions & support

The employee says they haven't received a WhatsApp message.

Check the mobile number is correct, including the country code (44 for the UK). If it's right, use Resend Invitation from the spanner menu.

Can I change the mobile number after sending?

No — the number locks once the request is created. If it's wrong, cancel the request and create a new one with the correct number.

What if the employee doesn't respond by the deadline?

You'll see the deadline on the dashboard. Extend it via Edit Onboarding Details, or cancel and re-invite.

Does Oscar work for all employee types?

Oscar collects the standard payroll onboarding information for most new starters. Your normal process applies for non-standard or complex arrangements.

EAP support

During the Early Adopter Programme you have direct access to the BrightPay product team. If something behaves unexpectedly, or you have feedback to share, please reach out — your input is exactly what this programme is built to capture.



YOUR EAP CONTACT
oscar.worker@brightsg.com

[Visit the Help Centre](#)

QUICK REFERENCE · AT A GLANCE

TASK	WHERE TO GO IN BRIGHTPAY
1 Enable Oscar for a client	Employer > Client Portal > Settings > Permissions
2 Send via Client Portal	Employees > Employee Onboarding > Employee Onboarding
3 Send via BrightPay	Employees > Employee Onboarding > Onboard New Employee
4 Review & approve	Dashboard > Review Now > Approve
5 Edit · resend · cancel	Spanner icon > next to the employee