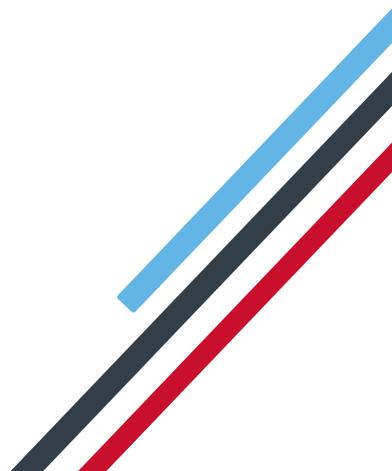




Getting Started Tutorial - Creating an Employee

IRIS Payroll

April 2016



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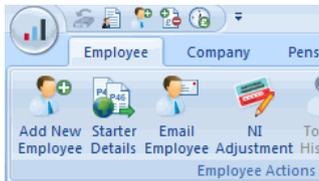
Creating an Employee Tutorial

The Getting Started Tutorials are designed to guide you through common payroll tasks using step by step instructions. You can work through these tutorials in order or you can select an individual tutorial topic to guide you through a particular task.

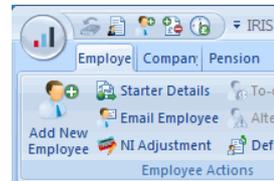
Remember there is a **Help** button on most screens, which will always give assistance specific to that task.

In these tutorials we assume that **RTI** is enabled and that the **Ribbon** is fully expanded, (i.e. taking up the whole of your screen) so you should be able to see the buttons and groups in full.

Maximised screen



Minimised screen



Use the Demonstration Company

You will be using the **Demonstration Company** for this tutorial. For details on how to access the Demonstration Company, click [here](#).

Creating an employee

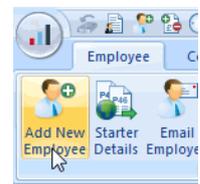
This tutorial will demonstrate how to add the basic details of a new employee to the payroll. Here are the details of the new employee you are going to add. Use this information to complete each tab as required.

Surname	Barlow														
First name(s)	Helen								Title	Mrs					
Address	21 New Road														
	Middlesbrough								Postcode	TS1 3EN					
Country	United Kingdom														
Telephone number	(01111) 333444														
Personal email address	helen.barlow123@freebie.net														
Start date (if agreed)	01/06/2009								Date of birth	18/11/1975					
Marital status	Married														
NI number	N	B	6	6	2	3	9	1	D	NI category	A				
UK BANK/ BUILDING SOCIETY DETAILS															
Bank or building society name	Barclays														
Branch address (where account held)	Yarm														
Name of Account	Mrs Helen Barlow														
Building Society Roll No															
Account No	8	8	8	6	6	4	4	4	Sort Code	6	6	5	5	4	4
Payroll Company	Demonstration Company														
Employee Number	Use next available number														
Job Title	Admin Supervisor														
Department	Admin														

PAY DETAILS									
				Per annum			Per month		
Basic salary				£14000			£1166.67		
P45	Yes	P46	No	Hours Worked Per Week			37.5		
P45 DETAILS									
Tax code	747L	W1/Mth1?	N	Pay To Date	£2000.00	Tax To Date	£184.00	First Pay Period	Month 3

To add a new employee

1. On the **Ribbon**, click the **Employee** tab
2. Click the **Add New Employee** button
3. The message 'Do you want to use the default employee details?' appears - click **No**



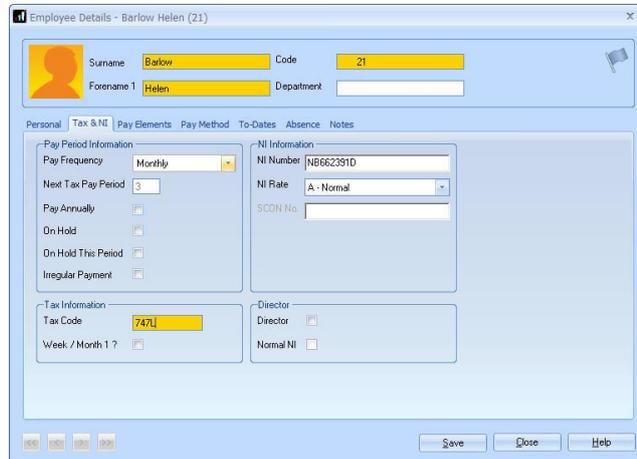
The **Employee Details** screen opens with the **Personal** tab already selected

Please Note: For future reference, to allow you to save an employee, the minimum information that must be entered here is **Surname** and **Forename 1**, **Address**, **DOB** and **Date Started**. There are certain other desirable fields for RTI purposes, please see **Help | RTI Guide** for further information.

4. Enter **Surname**, **Forename1**, **Title**, **Marital Status**, **DOB**, **Address**, **Postcode**, **Country**, **Tel No**, **Email**, **Job Title**, **Date Started** and **Hours Worked Per Week** from the new starter information provided
5. Click the **Tax & NI** tab of the **Employee Details** screen

Please note: For future reference, to allow you to save an employee, the minimum information that must be entered here is **Tax Code, NI Rate** (a default rate of A will be used if nothing else is specified) and the employee's **NI Number** (if you haven't entered a **DOB** on the **Personal** tab)

6. Enter **Pay Frequency, Tax Code, NI Number** and **NI Rate** from the new starter information provided



Employee Details - Barlow Helen (21)

Surname: Barlow Code: 21
Forename 1: Helen Department: []

Personal | Tax & NI | Pay Elements | Pay Method | To-Dates | Absence | Notes

Pay Period Information
Pay Frequency: Monthly
Next Tax Pay Period: 3
Pay Annually:
On Hold:
On Hold This Period:
Irregular Payment:

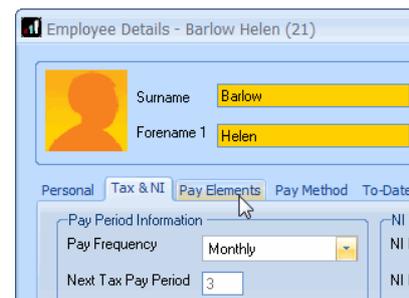
NI Information
NI Number: N8662391D
NI Rate: A - Normal
SCDN No: []

Tax Information
Tax Code: 747L
Week / Month 1?:

Director:
Normal NI:

Save Close Help

7. Click the **Pay Elements** tab



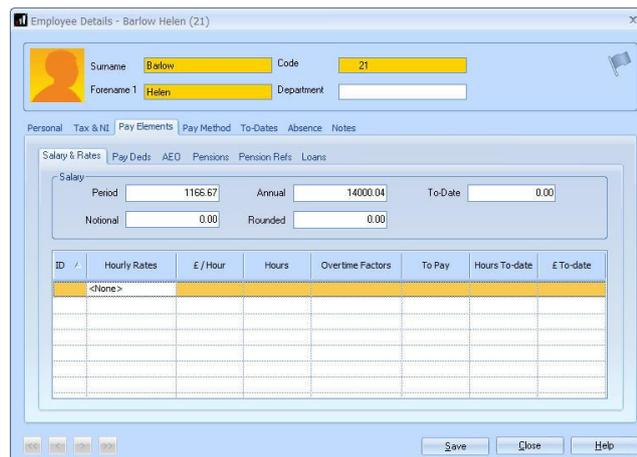
Employee Details - Barlow Helen (21)

Surname: Barlow
Forename 1: Helen

Personal | Tax & NI | Pay Elements | Pay Method | To-Dates

Pay Period Information
Pay Frequency: Monthly
Next Tax Pay Period: 3

8. On the **Salary & Rates** tab, enter the Annual Salary



Employee Details - Barlow Helen (21)

Surname: Barlow Code: 21
Forename 1: Helen Department: []

Personal | Tax & NI | Pay Elements | Pay Method | To-Dates | Absence | Notes

Salary & Rates | Pay Deds | AEO | Pensions | Pension Refs | Loans

Salary
Period: 1166.67 Annual: 14000.04 To-Date: 0.00
National: 0.00 Rounded: 0.00

ID	Hourly Rates	£ / Hour	Hours	Overtime Factors	To Pay	Hours To-date	£ To-date
<None>							

Save Close Help

9. Click the **Pay Method** tab



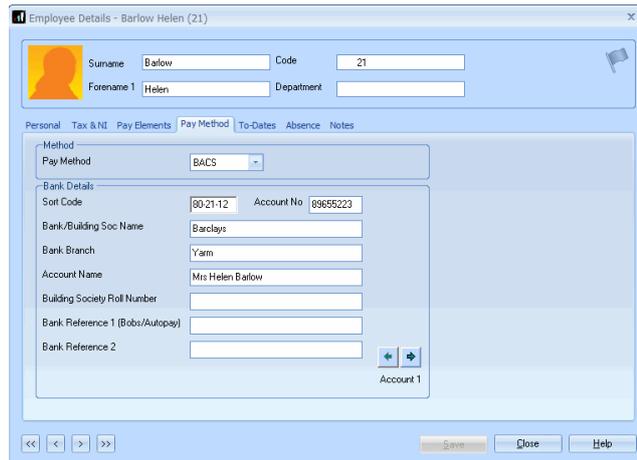
Employee Details - Barlow Helen (21)

Surname: Barlow
Forename 1: Helen

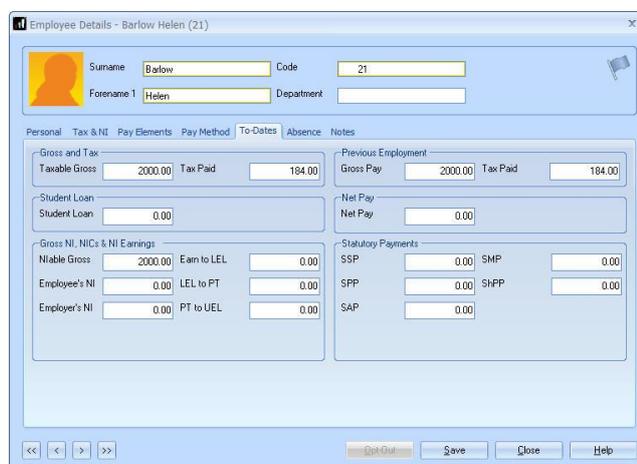
Personal | Tax & NI | Pay Elements | Pay Method | To-Dates

Salary & Rates | Pay Deds | AEO | Pensions | Pension Refs

- Select **BACS** from the **Pay Method** drop down list and enter the employee's **Bank Details** as provided



- Click the **To-Dates** tab and enter under **Previous Employment, Gross Pay** and **Tax Paid**



- Click **Save**

- Starter Details** are mandatory under RTI. Click the **Starter Details** button on the **Employee** tab of the **Ribbon** and enter the **Starting Declaration** details followed by **Save** then **Close**

- Click **Close** again

- Select **No** if asked whether you would like to add another employee

Please note: If you are setting up the payroll in the middle of a tax year and are adding existing employees, you will need to enter their values on their **To-Dates** tab.

Further Information

For more information, click the **Help** button on any of the screens.

More Getting Started Tutorials can be found via **Help | Getting Started**.

Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider* and generate the necessary employee communications.

IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	Tel: 0300 200 3200
Fax: 0844 366 7828	Tel: 0300 200 3211 (new business)
Email: helpdesk@ir-efile.gov.uk	

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0844 815 5700	Tel: 0844 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk