

# Getting Started Tutorial – Creating an Employee

**IRIS Payroll** 

April 2016



# **IRIS**

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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)	Hele	n								Title	Mr	S				
Address	21 New Road															
	Middlesbrough							Postcode	TS	1 3E	N					
Country	United Kingdom															
Telephone number	(011	11) 33	3344	14												
Personal email address	hele	n.bar	low´	123@	freek	bie.r	net									
Start date (if agreed)	01/0	6/200	)9							Date of	18	/11/	'197	5		
										birth						
Marital status	Mar	ried														
NI number	Ν	В	6	6	2	3	9	1	D	NI	А					
										category						
	UK B	BANK/	/ BU	ILDI	NG S	ocii	ETY	DE	TAIL	s						
Bank or building society	Barc	lays														
Bank or building society name	Barc	lays														
Bank or building society name Branch address (where	Barc	:lays n														
Bank or building society name Branch address (where account held)	Barc	ilays n														
Bank or building society name Branch address (where account held) Name of Account	Barc Yarn Mrs	:lays n Heler	ו Ba	rlow												
Bank or building society name Branch address (where account held) Name of Account Building Society Roll No	Barc Yarn Mrs	:lays n Heler	n Ba	rlow												
Bank or building society name Branch address (where account held) Name of Account Building Society Roll No Account No	Barc Yarn Mrs 8	:lays n Heler 8	n Ba	rlow	6	4	4	2	4	Sort Code	6	6	5	5	4	4
Bank or building society name Branch address (where account held) Name of Account Building Society Roll No Account No Payroll Company	Barco Yarn Mrs 8 Dem	lays n Heler 8 nonstr	n Ba 8 ratic	rlow 6 n Co	6 mpar	4 זער	4	2	4	Sort Code	6	6	5	5	4	4
Bank or building society name Branch address (where account held) Name of Account Building Society Roll No Account No Payroll Company Employee Number	Barco Yarn Mrs 8 Dem Use	lays n Heler 8 nonstr	n Ba 8 ratic	flow 6 n Co lable	6 mpar	4 ny ber	4	2	4	Sort Code	6	6	5	5	4	4
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# 

	PAY DETAILS										
				Per annum				Per month			
Basic salary				£14000				.67			
P45	Yes	P46	No	Hours Worl	ked Per We	ek	37.5	37.5			
					P45 DETAI	LS					
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

- Add New Starter Email Employee Details Employe
- 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.

- 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



Employee Details - Barlow Helen (21)     X									
Su For	Sumane Bałow Code 21								
Personal Tax & I Additional Em Title Forename 2 Known as Gender Marital Status DDB Passport No	II Pay Elements Pay Meth ployee Information Mrs • Female • 18/11/1975 —	Contact In Address Postcode Country Tel No Mobile No Ernail	Absence Notes     Komation     Z1 New Road     Middlestrough     TS1 3EN     United Kingdom     o     111 33444     helen.barlow123@freebie	Employment Informatio Job Title Employment Status Department Account Group Date Stated Date Left Hours Worked Per Week	Normal • • 01/06/2009 = = D • 30.00 hrs or more •				
	22			Save	<u>C</u> lose <u>H</u> elp				



**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)

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

Forename	1 Helen	Department	
eonal Tax & NI Pay	Flemente Day Method	To Dates Absence Notes	
-Pay Period Information			
Pay Frequency	Monthly	NI Number NB662391D	
Next Tax Pay Period	3	NI Rate A - Normal	
Pay Annually		SCON No.	
On Hold			
On Hold This Period			
Irregular Payment			
-Tax Information		Director	
Tax Code	747Ц	Director 🕅	
Week / Month 1 ?		Normal NI	

7. Click the Pay Elements tab



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

	Helen		Depart	ment			
onal Ta	x & NI Pay Elements	Pay Method	To-Dates Abse	ence Notes			
alary & R	ates Pay Deds AE	0 Pensions I	Pension Refs L	.oans			
Salaly	Period	1166.67	Annual	14000.04	To-Date	0	.00
	Notional	0.00	Rounded	0.00			
ID /	Hourly Rates	£ / Hour	Hours	Overtime Factors	To Pay	Hours To-date	£ To-date
	<none></none>	271100					

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 f

9. Click the **Pay Method** tab



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

Cumpana F	ladou	Code	21				W
Sumame	ranow						
Forename 1	lelen	Departmen					
rsonal Tax & NI Pay Eler	ments Pay Method	To-Dates Absence	Notes				
Method							
Pay Method	BACS	Ŧ					
Bank Details				=			
Sort Code	80-21-12	Account No 8	9655223				
Bank/Building Soc Name	Barclays						
Bank Branch	Yarm						
Account Name	Mrs Helen	Barlow					
Building Society Roll Numb	er						
Bank Reference 1 (Bobs/A	sutopay)						
Bank Reference 2							
				COURT L			
			~~~~	COOR 1			
			~	COURT			
			~				
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nployee Details - Barlon	w Helen (21) Salow	Code	21 x		Save	<u>C</u> lose	e Heb
nployee Details - Barloo Sumame [ Forename ] [	w Helen (21) Barlow Telen	Code Departmen	x 21		Save	<u></u> Close	e Help
) ← >> >> nployee Details - Barlon Surrane Forenane 1 [j sonal Tax & NG Pay Ele	w Helen (21) Jatow Telen ments Pay Method	Code Depatmer To-Dates Absence	x 21 x		Save	Close	e Help
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C > >> mployee Details - Barlon Sumane [ Forenane ] Sonal Tax & Nt Pay Ble Gross and Tax Taxable Gross 20	w Helen (21) Jadow Helen ments Pay Method 00000 Tax Paid	Code Departmen To-Dates Absenco 184.00	21 k Previous Em Gross Pay	ployment -	Save	<u>C</u> lose	e Hele
C > >> mployee Details - Barlor Sumame [ Forename 1] forename 1 forename 1] forename 1] fo	w Helen (21) Jarlow Helen ments Pay Method 00.000 Tax Paid	Code Departmer To-Dates Abseno 184.00	21 k E Notes Previous Em Gross Pay Net Pay	ployment -	Save	Close Tax Paid	e Heb
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0.00 SPP

0.00 SAP

0.00 ShPP

Opt-Out Save Close Help

0.00

0.00

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

13. 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

Employee's NI

Employer's NI

0.00 LEL to PT

0.00 PT to UEL

- 14. Click Close again
- 15. 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**.

# **IRIS**

# Additional Software and Services Available

#### IRIS AE Suite™

The IRIS AE Suite<sup>™</sup> 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<sup>™</sup>.

## **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



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