

# IRIS Payroll Business

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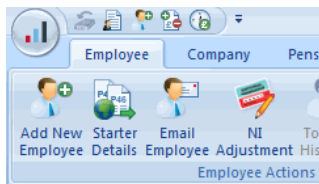
# Getting Started Tutorial – Creating an Employee

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, giving yourself a solid understanding of your payroll software, or you can select an individual tutorial topic to guide you through a particular task.

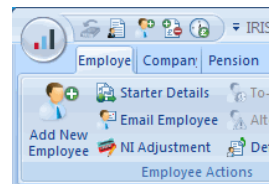
Remember there is a **Help** button on most screens, which will always give assistance specific to that task.

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**

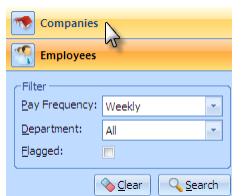


**Minimised screen**



## Use the Demonstration Company

You will be using the **Demonstration Company** for this tutorial.



To open the **Demonstration Company**, click on the '**Companies**' button in the **Selection Side Bar**.

Make sure the **Use Demo Data** box at the bottom of the screen is ticked and then double-click on '**0 Demonstration Company**'. Check the company name in the title bar is correct.

## Creating an employee

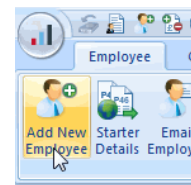
This tutorial will demonstrate how to add the basic details of a new employee to the payroll. Here are the details of the new employee you are going to add. Use this information to complete each tab as required.

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

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

To add a new employee:

- On the **Ribbon**, click the '**Employee**' tab
- Click the '**Add New Employee**' button
- 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
- 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)

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

- Click the **'Pay Elements'** tab

- On the **Salary & Rates** tab, enter the Annual Salary

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

- Click the **'Pay Method'** tab

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

Employee Details - Barlow Helen (21)

Surname: Barlow Code: 21  
Forename: Helen Department:

Method: Pay Method: BACS

Bank Details:  
Sort Code: 00-21-12 Account No: 09655223  
Bank/Building Soc Name: Barclays  
Bank Branch: Yarn  
Account Name: Mrs Helen Barlow  
Building Society Roll Number:  
Bank Reference 1 (Bobs/Autopay):  
Bank Reference 2:

Account 1

Save Close Help

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

Employee Details - Barlow Helen (21)

Surname: Barlow Code: 21  
Forename: Helen Department:

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

Gross and Tax: Taxable Gross: 2000.00 Tax Paid: 184.00  
Previous Employment: Gross Pay: 2000.00 Tax Paid: 184.00  
Student Loan: Student Loan: 0.00  
Net Pay: Net Pay: 0.00

Gross NI, NICs & NI Earnings:  
Nilable Gross: 2000.00 NI Earnings: 1a: 0.00  
Employer's NI: 0.00 NI Earnings: 1b: 0.00  
Employee's NI: 0.00 NI Earnings: 1c: 0.00  
NI Earnings: 1d: 0.00

Statutory Payments:  
SSP: 0.00 SMP: 0.00  
OSPP: 0.00 ASPP: 0.00  
SAP: 0.00

Save Close Help

- Click **'Save'**

**Please note:** **Starter Details** are mandatory under RTI. Click the **'Starter Details'** button on the **Employee** tab of the **Ribbon** and enter the **Starting Declaration** details now.

- Click **'Close'**
- Select **'No'** if asked whether you would like to add another employee
- That's it!

**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 more values on their **To-Dates** tab. For further details on this, see the topic **Starting Mid-Year** in the **Manual**.

## 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**.

If you encounter any difficulties, please visit [www.iris.co.uk/contactsupport](http://www.iris.co.uk/contactsupport)

## Software available from IRIS

### **IRIS Payroll Basics**

Free, RTI compliant payroll software for companies with fewer than 10 employees

### **IRIS Payroll Business**

Intelligent, easy to use payroll software for smaller businesses

### **IRIS Payroll Professional**

Flexible payroll software for medium sized businesses

### **IRIS Bureau Payroll**

Intelligent management for multiple payrolls

### **IRIS OpenPayroll**

Cloud-based UK payroll software – accessible from anywhere on PC, Mac or tablet

### **IRIS P11D**

The easy way to complete employee expenses and benefits returns

### **IRIS HR Manager**

The easy way to keep employee data up-to-date

### **IRIS OpenPayslips**

A secure web based solution that allows your employees to access and download their e-payslips via an online portal

## Stationery order line

0844 815 5656

## HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: [helpdesk@ir-efile.gov.uk](mailto:helpdesk@ir-efile.gov.uk)

## HMRC employer helpline

Tel: 0300 200 3200

## HMRC employer helpline (for new business)

Tel: 0300 200 3211

## Support

Tel: 0844 815 5661 (option 4)

Fax: 0844 815 5665

Email: [ipsupport@iris.co.uk](mailto:ipsupport@iris.co.uk)