

IRIS Payroll Business

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18/02/2014



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.

Companies Companies Employees	6	
Filter		
Pay Frequency:	Weekly	-
Department:	All	-
Elagged:		
	<u>♦ C</u> lear	rch

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.

Surname	Barl	WO														
First name(s)	Hele	n								Title	Mr	S				
Address	21 N	lew R	oad													
	Mido	dlesbi	roug	sh						Postcode	TS	1 3E	N			
Country	Unite	ed Kir	ngdo	m												
Telephone number	(011	11) 33	3344	14												
Personal email address	hele	n.bar	low´	123@	freel	oie.ı	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	ANK	/ BU	ILDII	NG S	οςι	ETY	' DE	TAIL	.S						
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					PAY DETA	LS			
				Per annum			Per m	onth	
Basic	salary			£14000			£1166	5.67	
P45	Yes	P46	No	Hours Worl	ked Per Wee	ek	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:

- 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



Employee De	tails - Barlow Helen (21)					×
	Sumame <mark>Barlow</mark> Forename 1 <mark>Helen</mark>	Ci Di	ode 21 epartment		P	
Additional Tax Additional Tak Forenamo 4 Known as Gender Marikal Stat DOB Passport N	AN Pay Bernents Pay Met mployee Information Mrs Female - # Married - 18/11/1975 M	Contact Info Address Postcode Country Tel No Mobile No Email	Aberere Notes mation 21 Haw Road Middlechrough TS1 2EN United Kingdom 01111 333444 helen ballow123@freebie	Employment Informati Job Title Employment Status Department Account Group Date Stated Date Left Hours Worked Per Week	on Nomal • • 07/06/2009 11 D • 30.00 hrs or more •	
	<u>92</u>			Save	<u>C</u> lose <u>H</u> elp	



x

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)

Employee Details - Barlow Helen (21)

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

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-Pay Period Informati Pay Frequency	on Monthly	NI Information NB662331D	
Next Tax Pay Period	3	SCON No.	
On Hold This Period Irregular Payment			
Tax Information	747L	Director	
Week / Month 1 ?		Normal NI	

Click the 'Pay Elements' tab

E E	mployee Details -	Barlow Hele	en (21)	
	Surnar	ne <mark>Barlow</mark> me1 <mark>Helen</mark>		
Pe	rsonal Tax & NI	Pay Elements	Pay Method	To-Date:
	-Pay Period Informa	ition 🛛 😽		
	Pay Frequency	Monthly	-	NI NI N
	Next Tax Pay Perio	od 3		NLF

 On the Salary & Rates tab, enter the Annual Salary

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Salary & R	ates PayDeds AE	0 Pensions P	ension Refs L	oans			
Period	1166.	67 Annual	14000)	00 Rounded	0.00	To-Date	0.00
ID 🗠	Hourly Rates	£ / Hour	Hours	Overtime Factors	To Pay	Hours To-date	£ To-date
	<none></none>						

Click the 'Pay Method' tab



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

Pay Method									
			BACS	*					
-Bank Details -						\equiv			
Sort Code			80-21-12	Account No 8965	5223				
Bank/Building	Soc Name		Barclays						
Bank Branch			Yarm						
Account Name	,		Mrs Helen Bar	low					
Building Societ	y Roll Num	ber							
Bank Referenc	e 1 (Bobs/	(Autopay)							
Bank Reference	æ 2				-	•			
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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.

Employee Details - Barlow Helen (21)

- 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**

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

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

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