Guide to setting up IRIS AE Suite ™

IRIS GP Payroll

April 2019

Contents

Dear Customer,

Welcome to your guide to setting up and using the IRIS AE web portal.
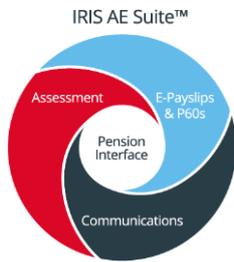
The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your payroll software), IRIS OpenEnrol and IRIS OpenPayslips/P60s. For more details on the IRIS AE Suite™ please contact Sales on **0344 815 5656**

The Guide will describe how to set up and use each function on the web and also within your payroll software.

The Guide contains instructions on setting up the cloud portal for the following elements of the IRIS AE Suite™:

- **IRIS OpenEnrol**

- **IRIS OpenPayslips, P60s and P45s**

Further help can also be found on our **website**

What is IRIS OpenEnrol?

IRIS OpenEnrol is an element of the IRIS AE Suite™; a new way to distribute workplace pension communications to employees. Letters that need to be sent to employees, in order to comply with legislation, will be created automatically when you run the payroll. They will then be published to a secure online portal. The letters are emailed directly to each employee, and once they have registered with the portal they will be able to quickly view all of their past automatic enrolment letters in an easy to access, secure area.

What will IRIS OpenEnrol do for me?

- Employees receive pension communications directly via email

- Letters can be accessed anywhere an internet connection is available

- Quick and easy to setup with no software to install

- Increases Automatic Enrolment administration efficiency

- Reduces carbon footprint demonstrating an environmentally friendly solution

- Reduces communication distribution costs including printing, postage and processing

- Fully secure

- Allows employees immediate 24/7 access to their own pension communication information

- Free IOS, Android and Windows Phone apps available for employees to securely view their own pension communications on tablets or smartphones

- Log into IRIS OpenEnrol to print any communications if an employee does not have an email address

- All published communications are date stamped for audit purposes and a copy stored against the employee record

How does IRIS OpenEnrol work?

Certain Automatic Enrolment triggers during the payroll run will cause a communication to be created, which you then need to publish to the IRIS OpenEnrol secure website. IRIS OpenEnrol takes that data and creates letters in the form of Adobe PDF files to be sent to your employees.

- If the employee has an IRIS OpenEnrol account an Adobe PDF version of the letter will be emailed to the employee and stored online

- If the employee does not have an account but has an email address they will still receive the pension communication but will also be asked if they wish to set up their online account. The letter content is in the email, meeting the TPR key requirements

- If the employee does not have an email address you can log onto IRIS OpenEnrol to print the required letter

> When you Publish for a company for the first time, the company and employee details are created for you in IRIS OpenEnrol.

Steps to setting up and using IRIS OpenEnrol

Create your IRIS AE Suite™ account

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Enter your IRIS OpenEnrol login details into the payroll

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Follow steps in Pension Guide to set up payroll correctly

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Publish letters from within payroll

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Use the IRIS OpenEnrol portal to manage pension communications to your employees
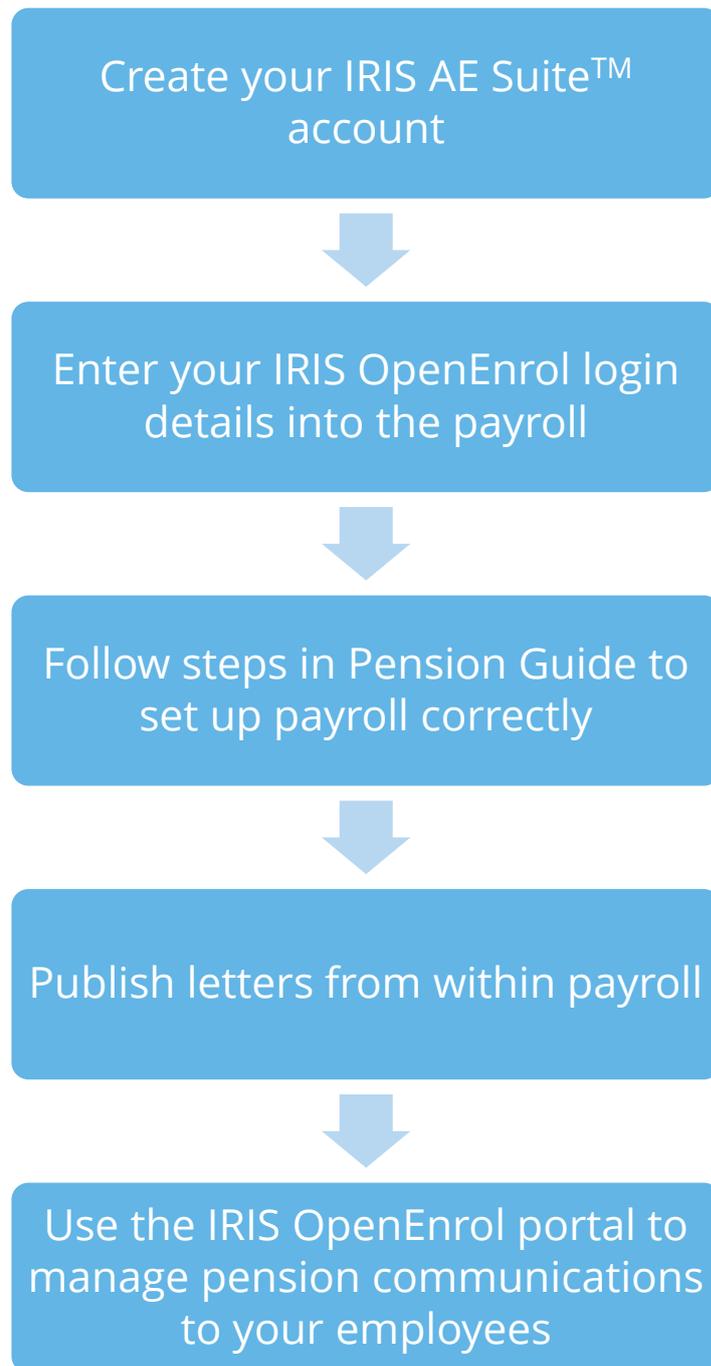
How to create an IRIS OpenEnrol account

> If you have an IRIS OpenPayslips account you do not need to set up a new account for IRIS OpenEnrol; you can click the **Login** button and login as normal

1. Once you have signed up for the IRIS AE Suite™ you will receive an email confirming your IRIS OpenEnrol account has been created. Click on the link to confirm your Contract and Direct Debit details
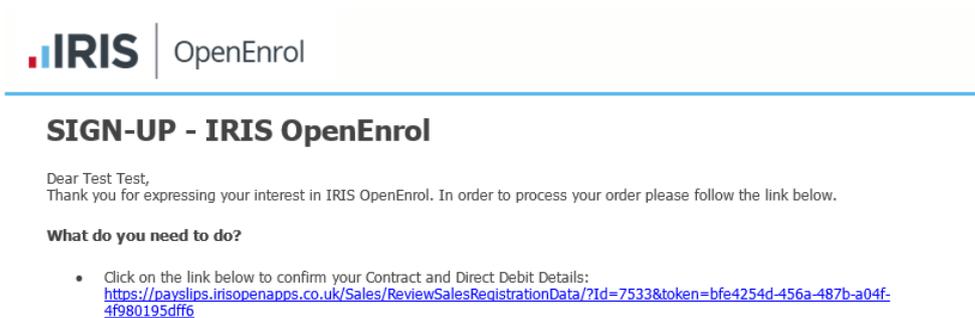
2. You will then receive an email confirming your account has been created. Click on the link in that message to complete your registration
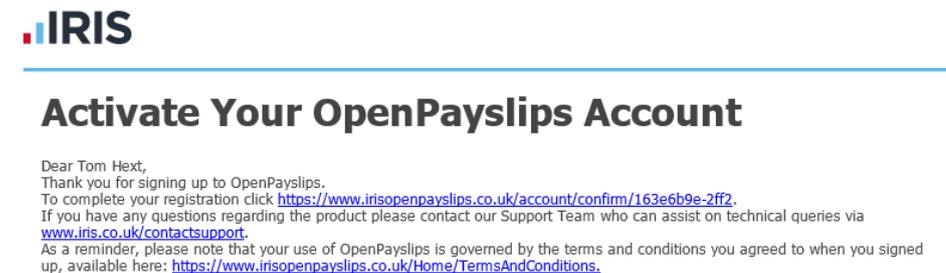
3. Enter your **New password**, **Confirm new password** and click on the **Set Password** button

4. Another email will be sent confirming those password details. You are now ready to use IRIS OpenEnrol

www.iris.co.uk/customer

How to set up IRIS OpenEnrol in the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have a valid email address.

1. Log into the payroll software, click on **Setup/ Options** from the main menu

2. Select tab **2 – Passwords**

3. Enter the email address and password registered on the portal and click **Update Login Details**

4. Click **Cancel** to return to the main menu

5. Make sure all employees have up-to-date, valid email addresses in the **Email** field in **Employee Details | Personal Profile**

6. Ensure the **Publish Payslip/P60** box it ticked
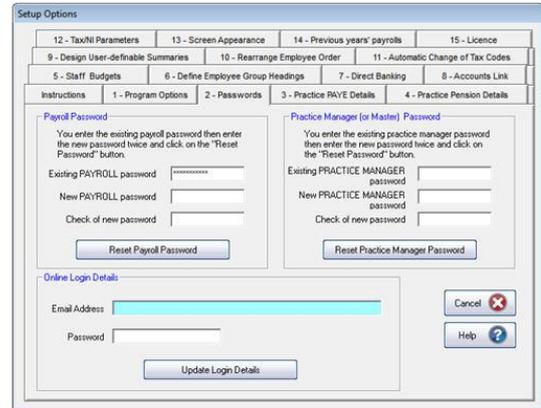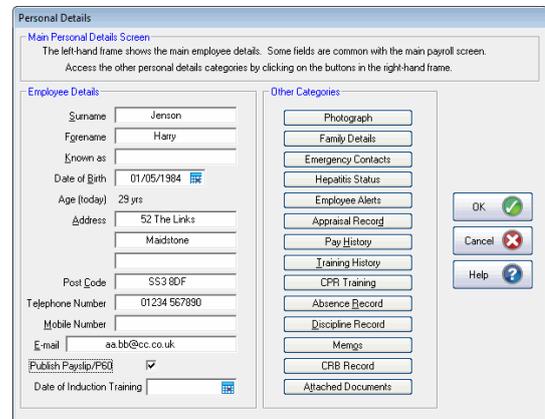
For IRIS OpenEnrol to operate correctly it is vital for certain information to be present. Instructions on what else you must do can be found in the Pension Guide, which you can access via the main screen in your payroll software

The Pension Guide also details how the letters are created and how to publish them

How to administer your employees' pension communications using IRIS OpenEnrol

1. Visit the IRIS OpenEnrol website at **https://www.irisopenpayslips.co.uk/** and click the **Login** button


2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **User name** is the **Email Address** you used. Click the **Login** button

   NOTE: To receive a password reminder simply click the '**Forgot your password?**' link

The first screen you see on logging in is the **Employees** tab. This is a summary of what's happened recently within the company.

3. Click on the **OpenEnrol** tab
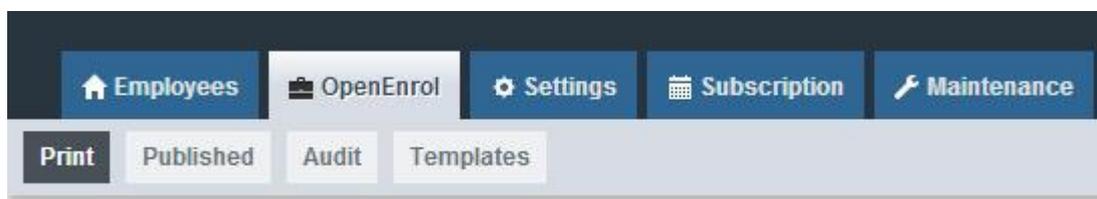
The **OpenEnrol** tab has four views, **Print**, **Published, Audit** and **Templates**. It opens by default on the **Print** view.

Print

Ideally your employees will have email addresses set up within the payroll software so that when you click the **Publish** button, the pension communications will be sent automatically via email to those employees. They will also be able to set up their own IRIS OpenEnrol accounts, and access their own communications via the portal.

However, there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication for audit purposes.

1. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals

2. Click the **Select All** box or tick the boxes to select particular letters. Then click the **Print** button

Published

You may need to resend emails or merely see what communications have been sent. To do this:

1. Click the **Published** button to open the **Published** view

You are able to view a list of all the emailed communications, as well as resend the emails if necessary, from this screen

2. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals

3. Click the **Select All** box, or tick the boxes to select particular letters. Then click the **Resend** button to resend the emails previously sent through the payroll software

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Audit

The **Audit** section is primarily for the Pensions Regulator, so you can provide evidence that you are meeting your legal obligations regarding pension communications.

1. Use the filters **From**, **To**, **Document**, **Client Filter** and **Employee Search** to narrow the list of entries as required

2. Click the **Quick Report** button to download a PDF version of the data on your screen

Templates

Finally, you can view the various **Templates** that are in use to create the letters, see what the current versions are and edit them in order to add your own logo and signature.

1. Click on the **Templates** button to open the **Templates** view

2. In the **View** column, click on the **View Template** link next to the template you are interested in

3. The screen will change to the **Edit Template** view. This will show the changes that have been made to that particular template, and when they were made

To add your logo to the template:

1. Click the **Edit Logo** button

(This screen may look slightly different if using a browser other than Internet Explorer)

2. Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**

3. Click **Save Changes** and your amended template will appear in the list as the latest version. Click the **View Template** link to view a PDF of your amended template

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What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips and P60s/P45s to employees. Payslips and P60s are published from within the payroll software to a secure online payslip portal. Once employees have registered with the portal, they are able to quickly view all of their current and historic payslips and/or P60s/P45s in an easy to access, secure area.

- All payslip/P60/P45 information is taken directly from the payroll software and displayed exactly how they are usually seen

- Payslips/P60s/P45 can be accessed anywhere an internet connection is available

- Quick and easy to setup with no software to install

- Increases payroll processing efficiency

- Reduces carbon footprint demonstrating an environmentally friendly solution

- Reduces payslip/P60/P45 distribution costs including printing, postage and processing

- Fully secure

- Allows employees immediate 24/7 access to their own pay information

- Easy access to historical pay information for both employer and employee

- Free IOS, Windows phone and Android apps available for employees to securely view their own payslips/P60s/P45s on tablets or smartphones

IRIS

Steps to setting up and using IRIS OpenPayslips

Visit IRIS OpenPayslips website and Create Account

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Update payroll software with Account details

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Check employee email addresses

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Publish payslips and/or P60s/P45s
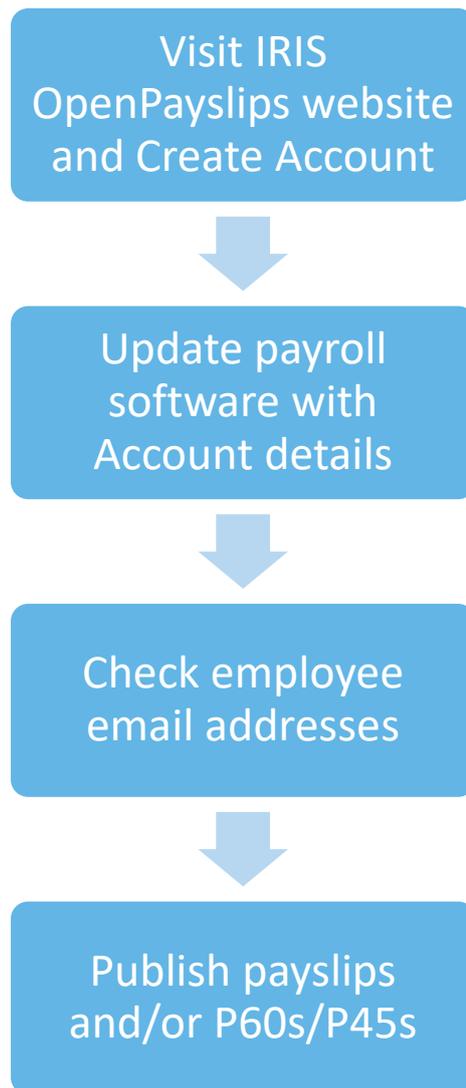
How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website at **https://www.irisopenpayslips.co.uk/**
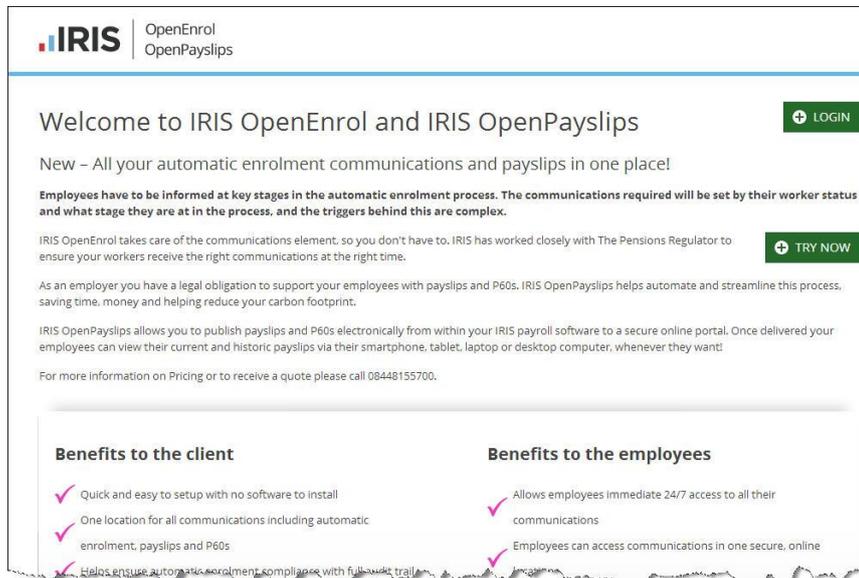
2. Click **Try Now** to open the following screen:
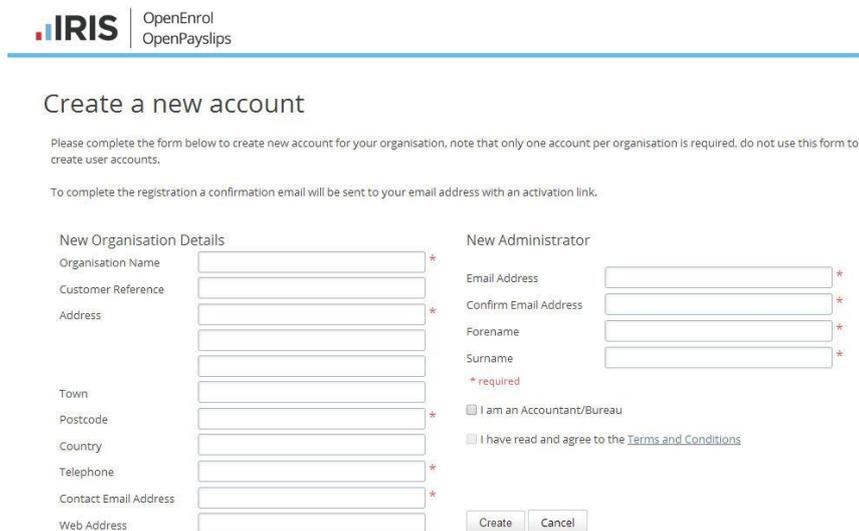
3. Enter the required details then click **Create**. An activation email will be sent to the New **Administrator - Email Address**

4. Click the link in the email to be taken back to the IRIS OpenPayslips website

5. Enter a **Password** and click **Set Password**

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How to update the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have valid email addresses.

1. Log into the payroll software, click on **Setup/ Options** from the main menu

2. Select tab **2 – Passwords**

3. Enter the **Email Address** and **Password** registered on the IRIS OpenPayslips website and click **Update Login Details**
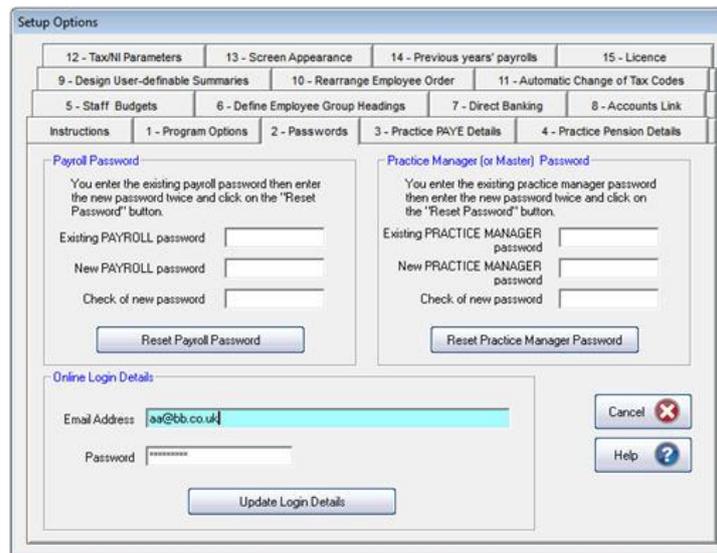
4. Click **Cancel** to return to the main menu

5. Select **Change Employee Details** and then select the **Employee Personal Profile**

6. Make sure all employees have an up-to-date, valid email address in the **Email** field

7. Ensure the **Publish Payslip/P60** box is ticked
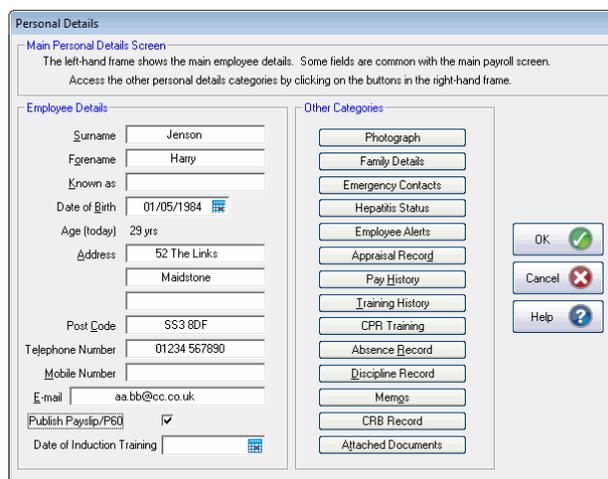
How to publish payslips/P60s/P45s to the IRIS OpenPayslips portal

Payslips

1. Once you have calculated the payroll go to **Print Output | Payslips**

2. Select the **Tax Period** you wish to publish for, then click the OpenPayslips **Publish** button
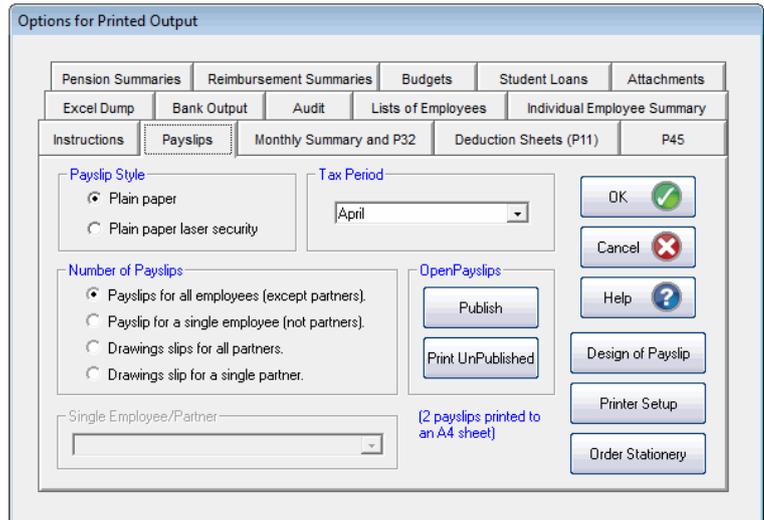
3. You will be informed when the Payslips have been published successfully

4. All employees paid in the selected pay period with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip

5. If not all employees have an email address, you can print those that haven't been published to by selecting the **Print Un-Published** button

6. All employees paid in the selected pay period with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip

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P60s

1. From the main screen, go to **End of Year**, select **Step 2 – Print P60s in a variety of formats** and click **OK**

2. Select **Print employee P60s onto blank A4 paper** then **OK**

3. Select **P60s for ALL employees** or **A P60 for a SINGLE employee**, then click the IRIS OpenPayslips **Publish** button

4. You will be informed when the P60s have been published successfully

5. All employees with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their P60

6. If not all employees have an email address, you can print those that haven't been published to by selecting the **Print UnPublished** button

P45s

1. From the main screen, go to **Print Output | P45**

2. From the **Print a P45 for a leaver** drop-down menu, choose the employee

3. Click the OpenPayslips **Publish** button

4. You will be informed when the P45 has been published successfully

5. As long as the employee has an email address in their record, an email will then be sent asking them to register with the IRIS OpenPayslips website to view/print their P45

How the employer views the published payslips/P60s/P45s

To view the published payslips/P60s/P45s:

1. Go to the IRIS OpenPayslips website at **https://www.irisopenpayslips.co.uk/** and log in with the registered email address and password

2. Click on an employee's name and the screen will change on the right to show only their communications

3. Select the tax year on the right that you wish to look at, then click on either the **Payslips** tab, **P60** tab or **P45** tab. The screen will change again to show the payslips/P60s/P45s uploaded for the employee in that tax year

4. Click on the payslip, P60 or P45 and a new browser tab will open containing a copy to be viewed or printed as needed

5. Click back to the first browser tab to return to IRIS OpenPayslips

Managing the IRIS OpenEnrol & IRIS OpenPayslips Account

The main page has five tabs on the top left, **Employees, OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (**IRIS OpenEnrol** is detailed earlier in this guide)

Employees

The **Employees** tab displays all employees from the Company in the payroll software that have had payslips/P60s/P45s published to IRIS OpenPayslips, along with their current **Status.** The list of employees can be sorted using any of the columns; **Status** shows whether a registration email has been sent and whether the employee has registered with IRIS OpenPayslips yet.

How to edit an employee's details

1. On the **Employees** tab select the individual using the buttons on the left, then click **Edit Employee**

2. Amend details, then click **Update**

> If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s

IRIS OpenEnrol

IRIS OpenEnrol is an element of the IRIS AE Suite™ detailed earlier in this guide

Settings

The **Settings** tab has two buttons on the top left, **Account Details** and **Report.**
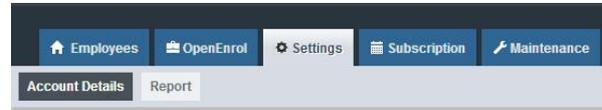
When the **Settings** tab is selected it opens by default on the **Account Details** view.

- **Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button
- From the **Report** button you can:
  - Use the **Audit Log Report** to view a list of all actions taken within this account. Use the **Search** box to filter the results if required
  - View **Published Payslips History** to create a report showing the number of files uploaded per payroll company. Enter the relevant dates and click either **Data Export (.CSV)** or **Print View**
  - View **Changed Employee Emails** showing previous email addresses and what they have changed to

Subscription

The **Subscription** tab has two sections, **Contract** and **Invoice History**.

- **Contract Details** displays your **Start Date** and **End Date**
- Click on **Invoice History** to view, print or export invoices

Maintenance

The **Maintenance** tab allows you to recall payslips that have been sent in error. You can recall **Payslips, P60s**, **P45s** and **Pensions** information by clicking on the relevant button at the top of the screen.

To recall a document:

1. Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
2. Click the **Recall** button

This will remove the published document from the website**, it will not recall the actual sent email** (which in the case of Pensions includes a copy of the letter). If the employee tries to click on the link to the payslip/P60/P45 in the email, it will not work.