IRIS OpenEnrol &

IRIS OpenPayslips Guide

for IRIS Bureau Payroll

01/09/2014

This Guide details how to set up and use the IRIS OpenEnrol and IRIS OpenPayslips web portal. Click the links in the Contents page below to take you to the relevant section.

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

Contents

What is IRIS OpenEnrol?

IRIS OpenEnrol is a new way to distribute workplace pension communications to employees. The 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 the secure online IRIS OpenEnrol 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. For those employees without an email address you can print communications directly from the portal.
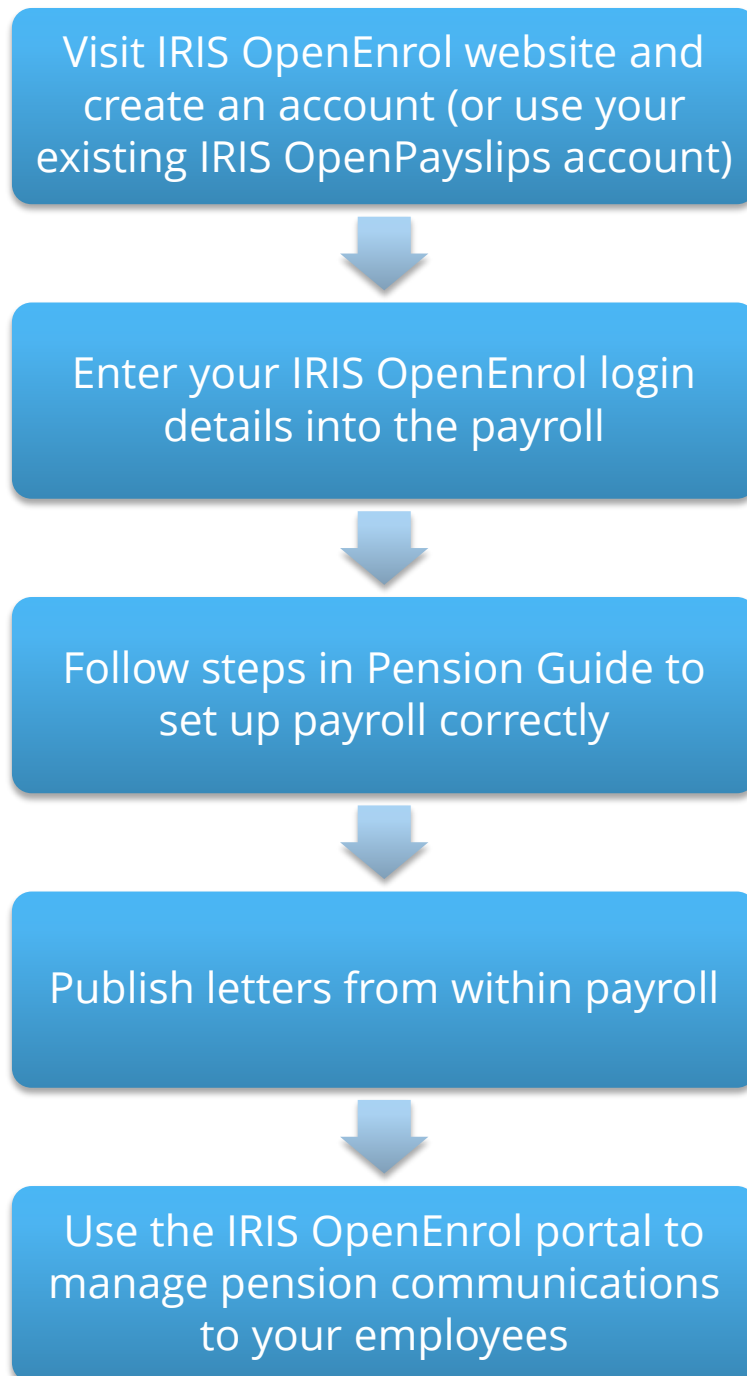
What will IRIS OpenEnrol do for me?

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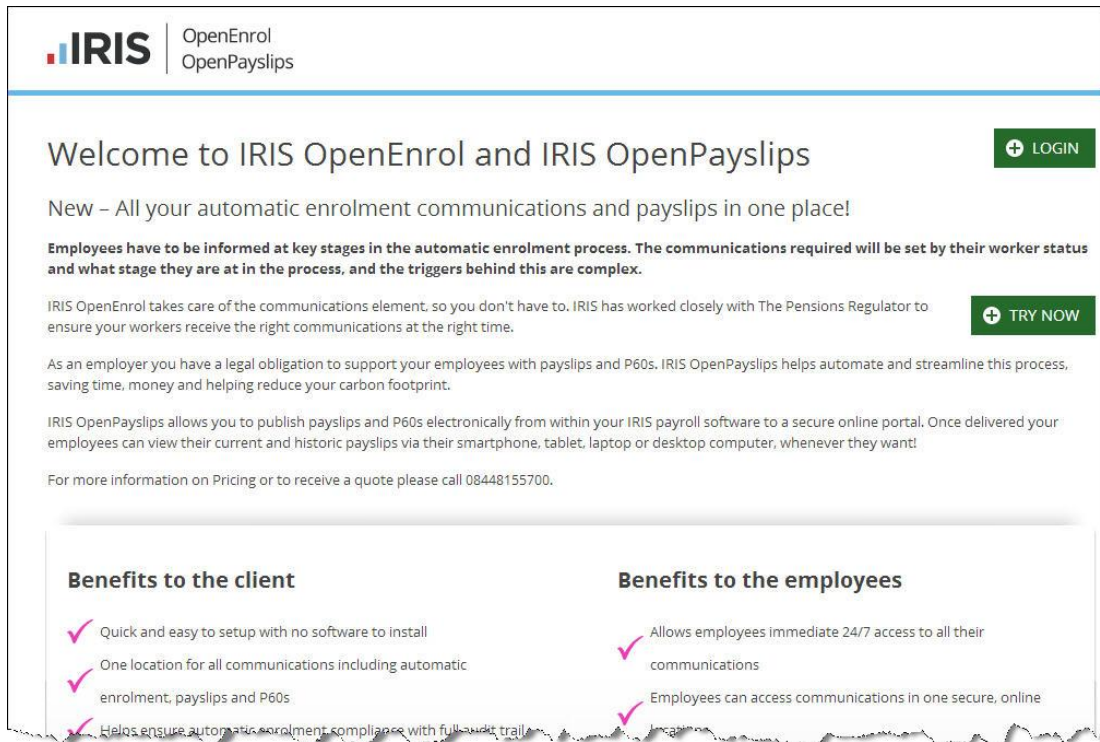- If the employee does not have an email address you can log onto IRIS OpenEnrol to print the required letter

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Steps to setting up and using IRIS OpenEnrol

Visit IRIS OpenEnrol website and create an account (or use your existing IRIS OpenPayslips 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

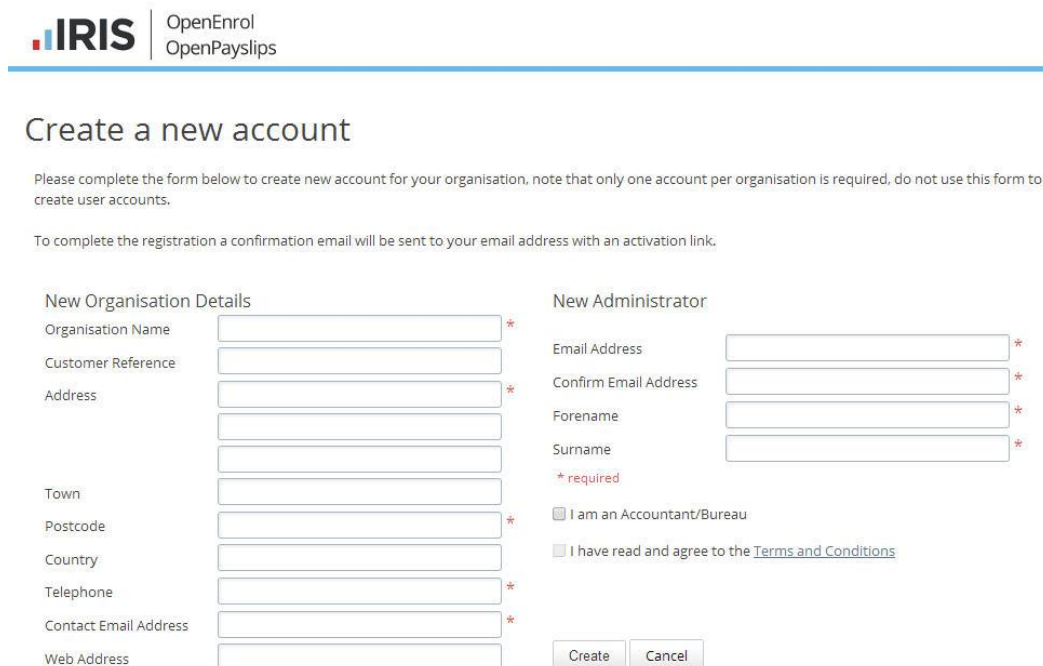# How to create an IRIS OpenEnrol account

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. Visit the IRIS OpenEnrol 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 OpenEnrol website
5. Enter a **Password** and click **'Set Password'**

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 **Admin**, click on **'File | Online Login Details'**

2. Enter the email address and password registered on the portal and click **'OK'**

3. Log back into the payroll and make sure all employees have an up-to-date, valid email address within **Employee details**

> **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 Pension menu 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
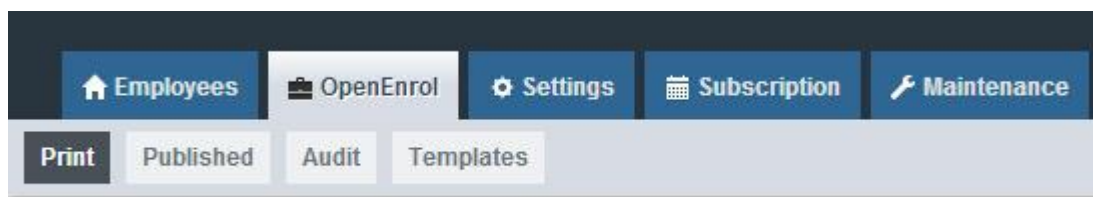

2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **User name** is the **Email Address** you used. Click the **'Login'** button

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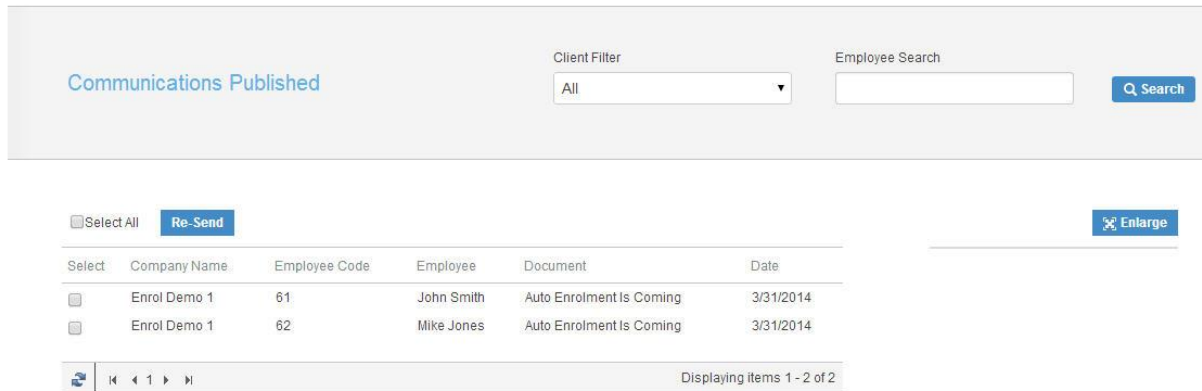
However there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication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

1. Use the **Client 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

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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 **Client 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

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

Template History

Template Type	Version	Reason For Change	Live Date	View
Auto Enrolment Is Coming	1.1	Logo changed	2014-03-11	View Template
Letter 1 - for Eligible Jobholders (no postponement)	1	Initial Version	2014-03-07	View Template
Letter 1P - for Eligible Jobholders (Postponement Version)	1	Initial Version	2014-03-07	View Template
Letter 1T - for Eligible Jobholders (Transitional Version)	1	Initial Version	2014-03-07	View Template
Letter 1 - Opt in/Joining Scheme	1	Initial Version	2014-03-07	View Template
Letter 2 & 3 - for Non-Eligible Jobholders and Entitled Workers	1	Initial Version	2014-03-07	View Template
Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	1	Initial Version	2014-03-07	View Template
Letter 6 - for all workers - postponement	1	Initial Version	2014-03-07	View Template

Displaying items 1 - 8 of 8

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

Edit Template
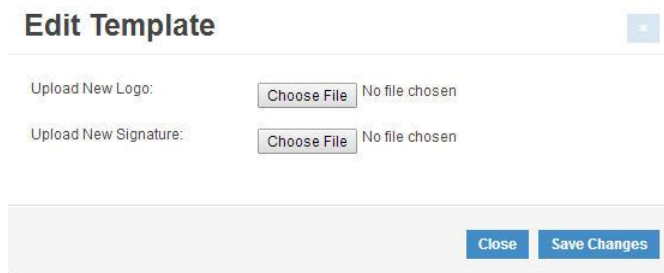
← Back   ⬇ Edit Logo...   ⬇ Edit Signature...

Version	Document	Reason of Change	Live Date	View Template
1.1	Auto Enrolment Is Coming	Logo changed	2014-03-11	View Template
1	Auto Enrolment Is Coming	Initial Version	2014-03-07	View Template

Displaying items 1 - 2 of 2

To add your logo to the template:

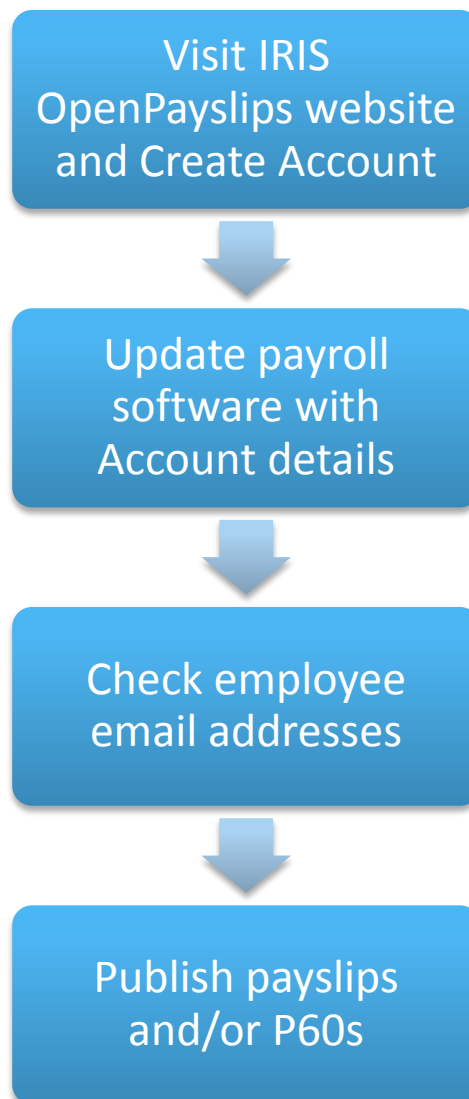1. Click the **'Edit Logo'** button

2. Click the **'Choose File'** 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

What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips and P60s 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 in an easy to access, secure area.

- All payslip/P60 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s 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 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 on tablets or smartphones

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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
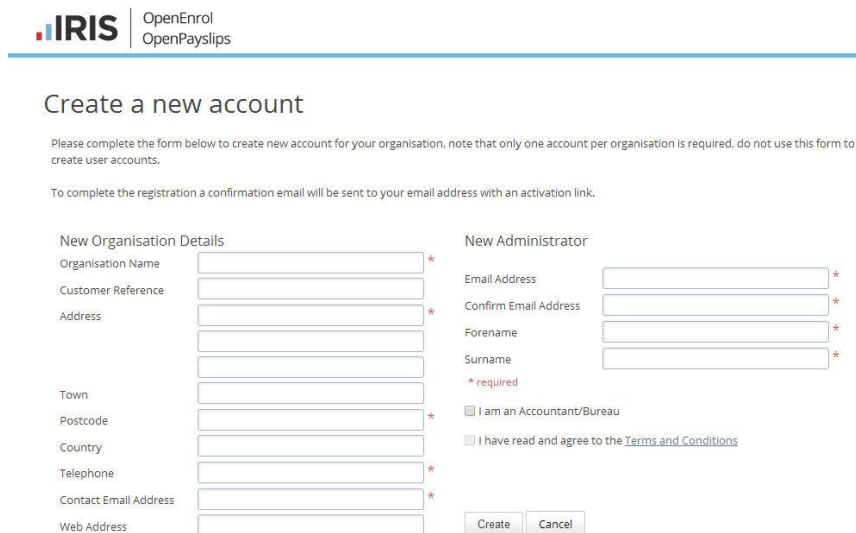
How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website at **https://www.irisopenpayslips.co.uk/**
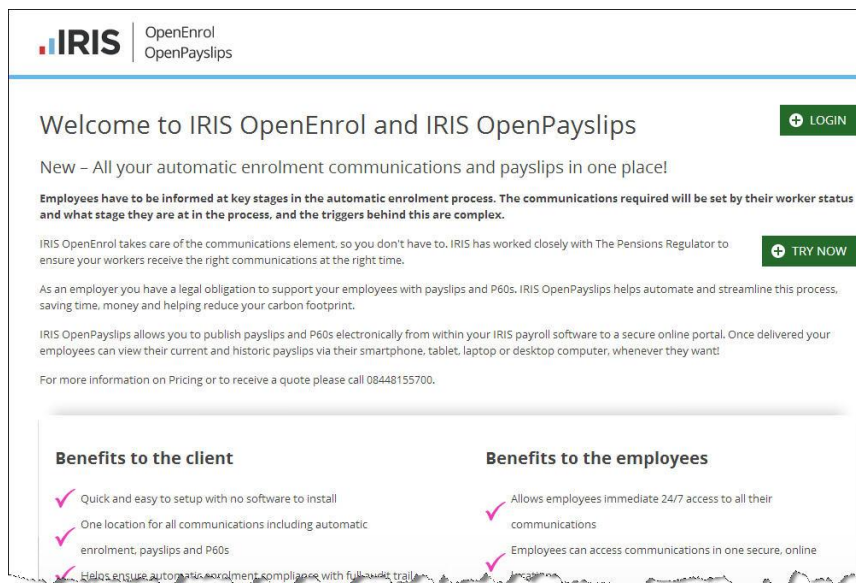
2. Click **'Try Now'** to open the following screen:

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**'
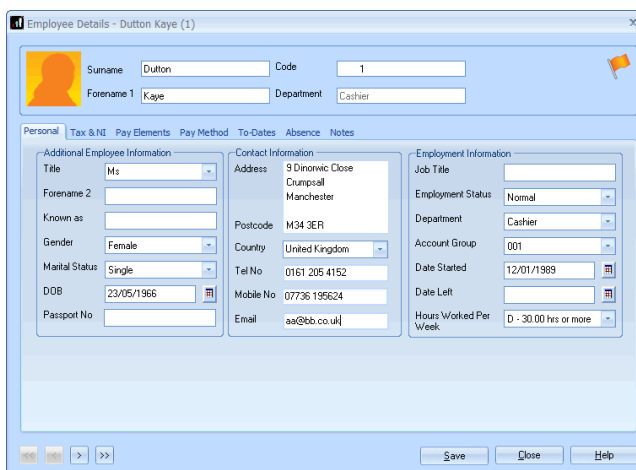
www.iris.co.uk/customer

How to update the payroll software (IRIS Bureau Payroll)

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

1. Log into **Admin**, click on **'File | Online Login Details**'

2. Enter the **Username** and **Password** registered on the IRIS OpenPayslips website and click **'OK'**


3. Log back into the payroll and make sure all employees have up-to-date, valid email addresses within **Employee Details**

How to publish payslips/P60s to the IRIS OpenPayslips portal (IRIS Bureau Payroll)
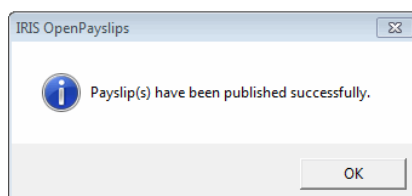
Payslips

1. Select the **Pay Frequency** then go to **'Reports | Print Payslips'**
2. If necessary change the period you wish to publish for and click **Refresh**.
3. Click the IRIS OpenPayslips **'Publish'** button at the top right of the screen
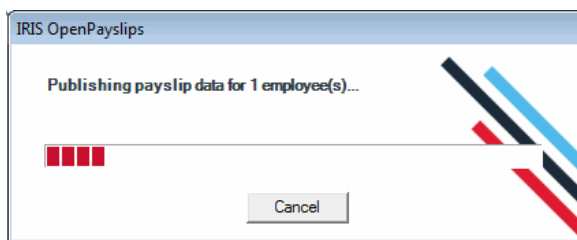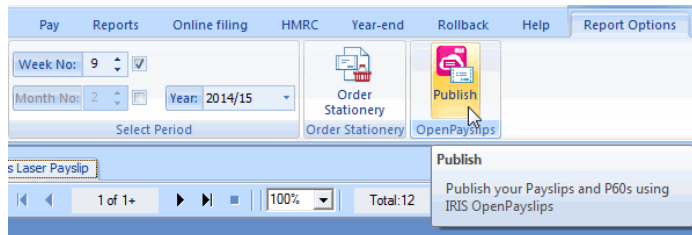
4. If not all employees have an email address, a message will appear asking if you wish to print payslips for those individuals
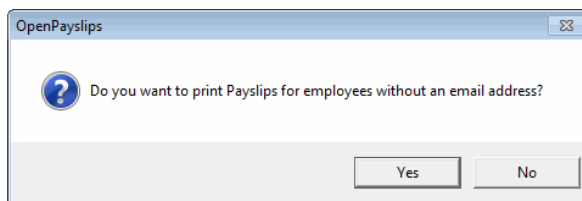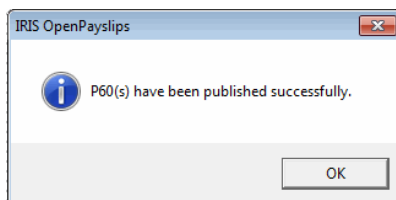

5. Select '**Yes**' or '**No**'

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 **Reports | Report Manager | Year-end**, add the **E-P60** to the **Selected Reports** (this only needs to be done once)
2. Select the **Pay Frequency** then go to '**Reports | Year-end Reports**'
3. Select the '**E-P60'**
4. Click the **'Publish'** button at the top of the screen
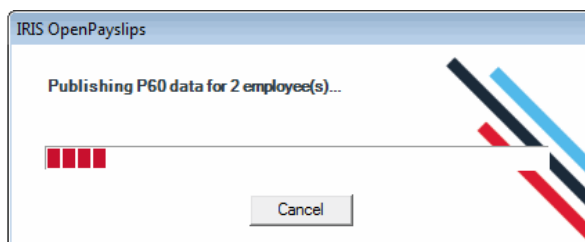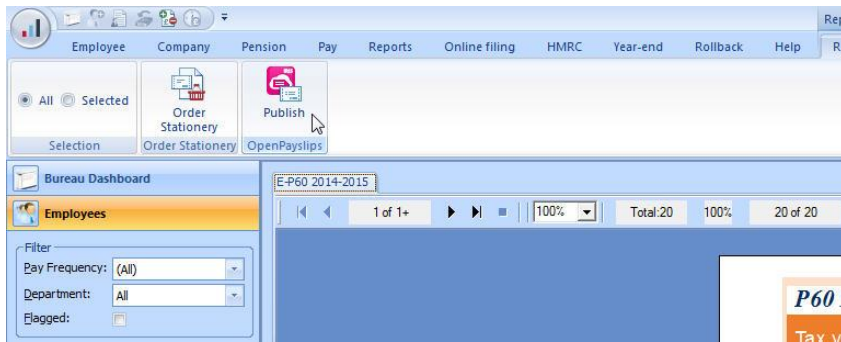
5. All current employees paid in the tax year with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their P60

How the employer views the published payslips/P60

To view the published payslips/P60:

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 to show tax year folders
3. Select the tax year you wish to look at then click on either the **Payslips** tab or **P60** tab and the screen changes again to show the payslips/P60s uploaded for the employee in that tax year
4. Click on the Payslip or P60 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 OpenPayslips Account

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

Employees

The **Employees** tab displays all employees from all companies in the payroll software that have had payslips/P60s 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.

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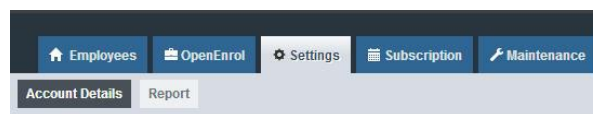

2. Amend details, then click **'Update'**

> **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 a separate module 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:
  - 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'**
  - 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 **Changed Employee Emails** showing previous email addresses and what they have changed to.

Subscription

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

- ■ **Contract Details** displays your **Contract ID**, **Contract Type**, **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** and **Pensions** information by click 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. However, if the employee tries to click on the link to the payslip/P60 in the email, it will not work.

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

KashFlow Payroll
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

Tel: 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 5)
Fax: 0844 815 5665
Email: ipsupport@iris.co.uk

Call **0844 815 5656**, or visit **iris.co.uk** to find out more