



Guide to setting up IRIS AE Suite™

IRIS GP Payroll

April 2019

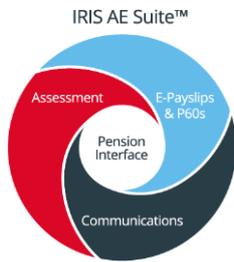


Contents

What is IRIS OpenEnrol?	4
What will IRIS OpenEnrol do for me?	4
How does IRIS OpenEnrol work?	5
Steps to setting up and using IRIS OpenEnrol	6
How to create an IRIS OpenEnrol account.....	7
How to set up IRIS OpenEnrol in the payroll software.....	8
How to administer your employees' pension communications using IRIS OpenEnrol	9
Print	10
Published	11
Audit	12
Templates	13
What is IRIS OpenPayslips?	15
Steps to setting up and using IRIS OpenPayslips	16
How to create an IRIS OpenPayslips account.....	17
How to update the payroll software.....	18
How to publish payslips/P60s to the IRIS OpenPayslips portal.....	19
Payslips.....	19
P60s	20
How the employer views the published payslips/P60.....	20
Managing the IRIS OpenEnrol & IRIS OpenPayslips Account	21
Employees.....	21
IRIS OpenEnrol	23
Settings.....	23
Subscription.....	23
Maintenance.....	23

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

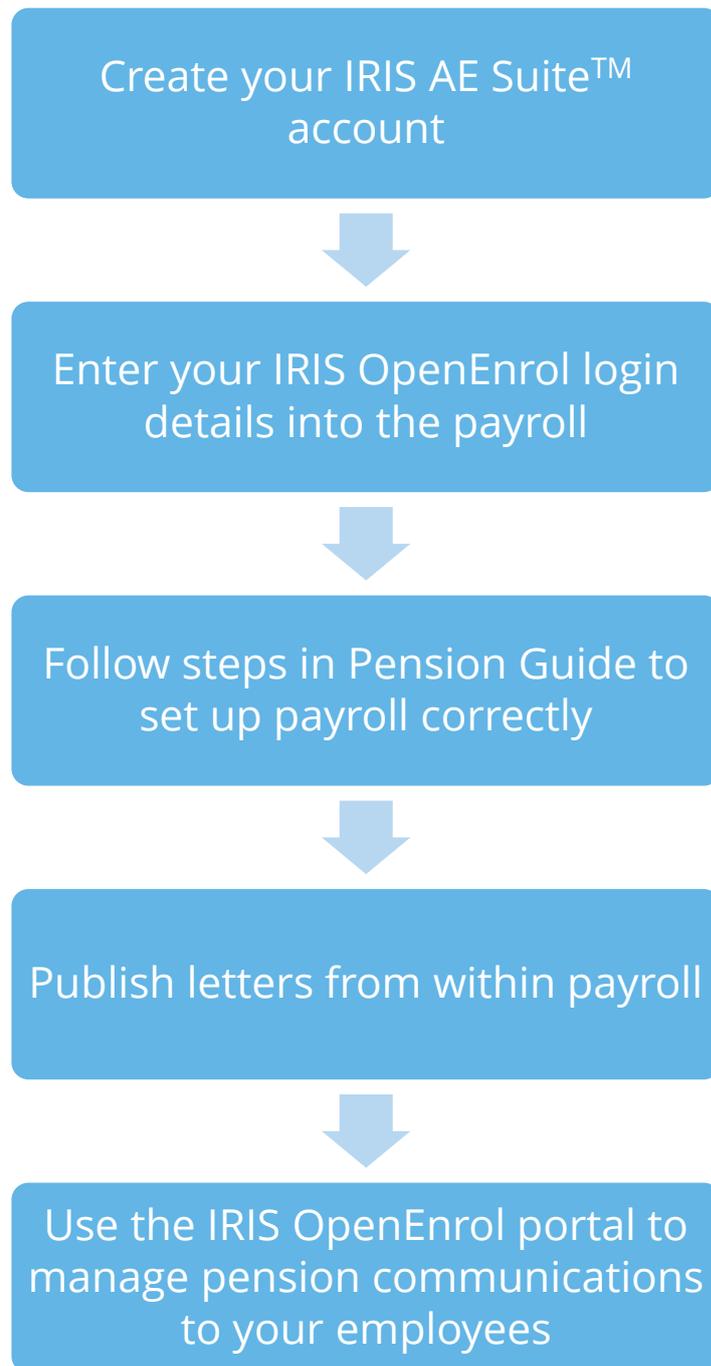
How does IRIS OpenEnrol work?

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.

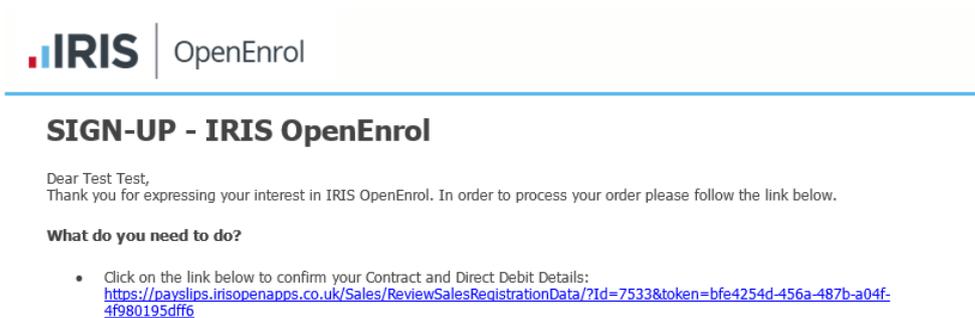
Steps to setting up and using IRIS OpenEnrol



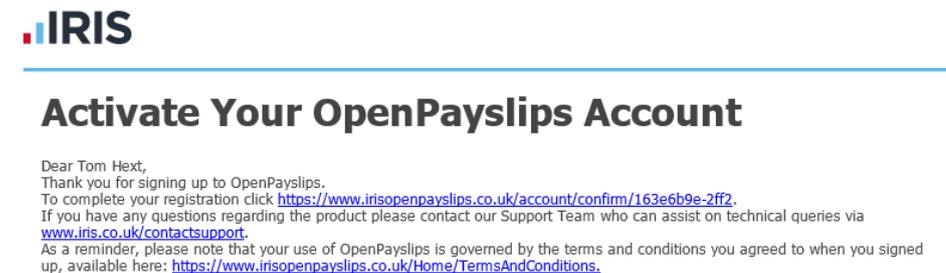
How to create an IRIS OpenEnrol account

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



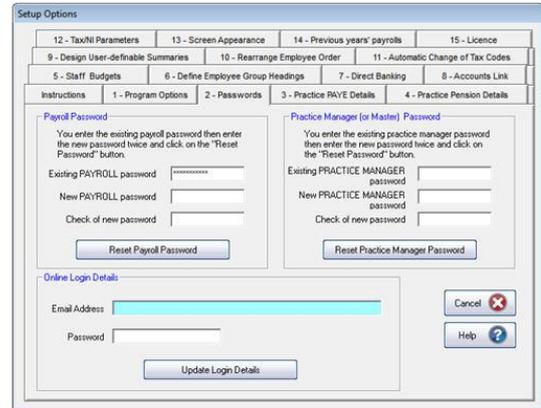
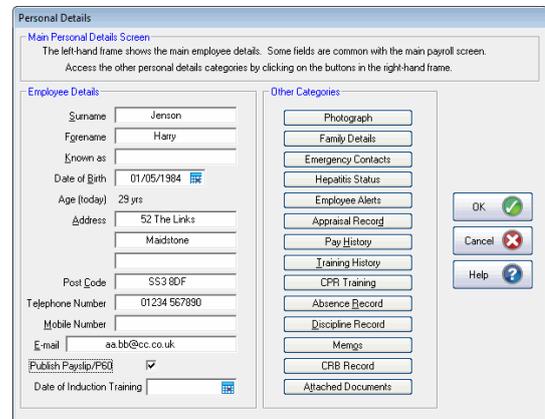
3. Enter your **New password**, **Confirm new password** and click on the **Set Password** button

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

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 is 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



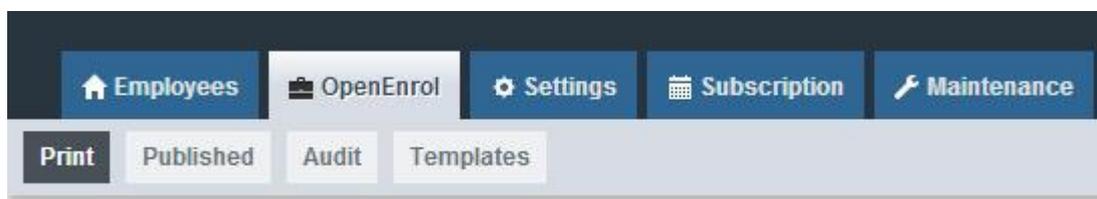
The screenshot shows the login interface for IRIS OpenEnrol. At the top left is the IRIS logo. To its right, the text 'OpenEnrol OpenPayslips' is displayed. Below this, there are two input fields: 'Username' with the placeholder text 'user@example.com' and 'Password'. Under the password field is a checkbox labeled 'Remember me?' and a blue link that says 'Forgot your password?'. At the bottom of the form are two buttons: 'Login' and 'Cancel'.

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

Communications to be printed

Company Filter: All Employee Search: Q Search

Select All Print Enlarge

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	7	ioog cfidiyiksd	NR345678A	Letter 1 - for Eligible Jobholders (no postponement)	Twilight Test Co Ltd	13/08/2015
<input type="checkbox"/>	20	Farrah FRANKENSTEIN	SA879508D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	19	Harry STABB	JA665082C	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	15	Beatrice HYDE	TY682734B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	14	Gladys EMMANUELLE	NM765340A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015

 OpenEnrol

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.

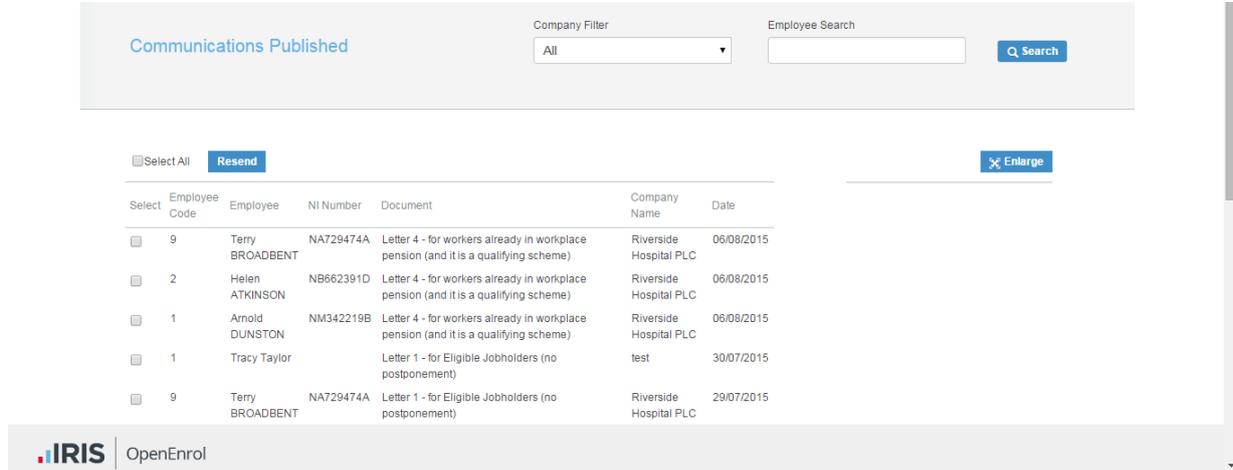
However, there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication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



The screenshot shows the 'Communications Published' interface. At the top, there is a 'Company Filter' dropdown set to 'All' and an 'Employee Search' input field with a 'Search' button. Below this is a table of communications. The table has columns for 'Select', 'Employee Code', 'Employee', 'NI Number', 'Document', 'Company Name', and 'Date'. There are five rows of data. Above the table, there is a 'Select All' checkbox and a 'Resend' button. To the right of the table, there is an 'Enlarge' button. The bottom of the screenshot shows the IRIS logo and 'OpenEnrol' text.

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	2	Helen ATKINSON	NB662391D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Arnold DUNSTON	NM342219B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Tracy Taylor		Letter 1 - for Eligible Jobholders (no postponement)	test	30/07/2015
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 1 - for Eligible Jobholders (no postponement)	Riverside Hospital PLC	29/07/2015

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

Audit

The screenshot shows the 'Audit' section of the IRIS system. At the top, there are filters for 'From' and 'To' (both with date pickers), 'Document' (a dropdown menu set to 'All'), and 'Company Filter' (a dropdown menu set to 'All'). Below these is an 'Employee Search' input field and a 'Search' button. A 'Quick Report' button is located above a table of audit entries. The table has columns for Employee Code, Employee, Date, NI Number, Document, Version, Template, Company Name, and Printed/Emailed. The footer of the interface shows the IRIS logo and the text 'OpenEnrol'.

Employee Code	Employee	Date	NI Number	Document	Version	Template	Company Name	Printed/Emailed
7	loog cfidiylksd	13/8/2015 15:12	NR345678A	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	To Be Printed
1	Hilary Greenheld	13/8/2015 15:05	NR569924B	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	Printed
6	aergaer	13/8/2015	NR562398A	Letter 1 - Opt in/Joining Scheme	2	View	Twilight Test Co	Printed

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	1.3	Logo changed	2015-07-16	View Template
Letter 1 - for Eligible Jobholders (no postponement)	2.4	Logo changed	2015-07-16	View Template
Letter 1P - for Eligible Jobholders (Postponement Version)	2	Initial Version	2014-12-03	View Template
Letter 1T - for Eligible Jobholders (Transitional Version)	2	Initial Version	2014-12-03	View Template
Letter 1 - Opt in/Joining Scheme	2	Initial Version	2014-12-03	View Template
Letter 2 & 3 - for Non-Eligible Jobholders and Entitled Workers	2	Initial Version	2014-12-03	View Template
Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	2	Initial Version	2014-12-03	View Template
Letter 6 - for all workers - postponement	2	Initial Version	2014-12-03	View Template

« ‹ 1 › »
Displaying items 1 - 8 of 8

OpenEnrol

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
1.3	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1.2	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1.1	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1	Auto Enrolment Is Coming	Initial Version	2014-05-20	View Template

« ‹ 1 › »
Displaying items 1 - 4 of 4

OpenEnrol

To add your logo to the template:

1. Click the **Edit Logo** button

A screenshot of a web application dialog box titled 'Edit Template'. The dialog has a close button (an 'x' in a square) in the top right corner. Below the title bar, there are two rows of input fields. The first row is labeled 'Upload New Logo:' and contains a grey rectangular input field followed by a 'Browse...' button. The second row is labeled 'Upload New Signature:' and contains a similar grey rectangular input field followed by a 'Browse...' button. At the bottom right of the dialog, there are two blue buttons: 'Close' and 'Save Changes'.

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

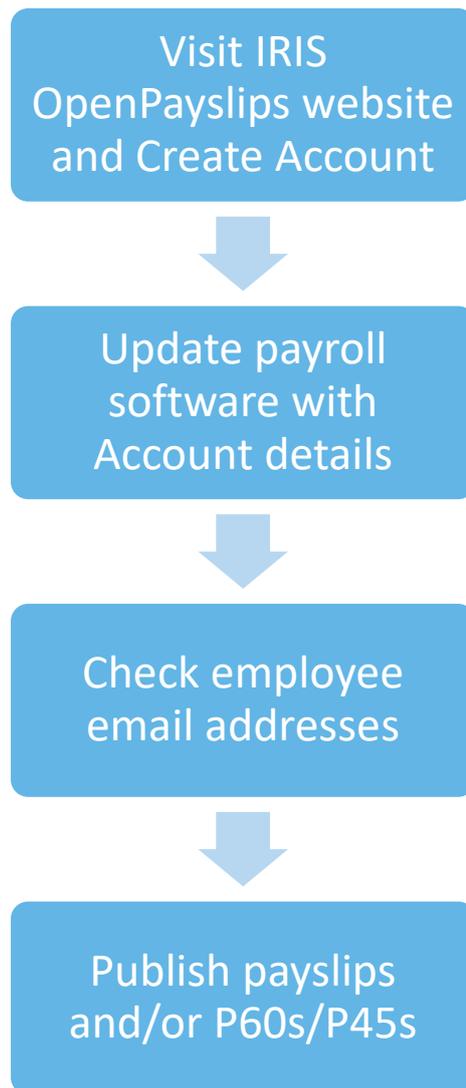
2. Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**
3. Click **Save Changes** and your amended template will appear in the list as the latest version. Click the **View Template** link to view a PDF of your amended template

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.

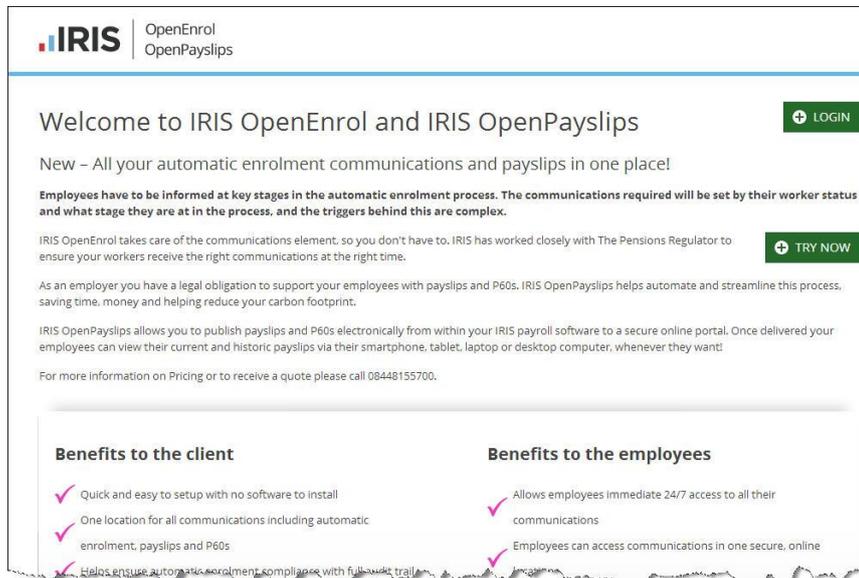
- All payslip/P60/P45 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s/P45 can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases payroll processing efficiency
- 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

Steps to setting up and using IRIS OpenPayslips

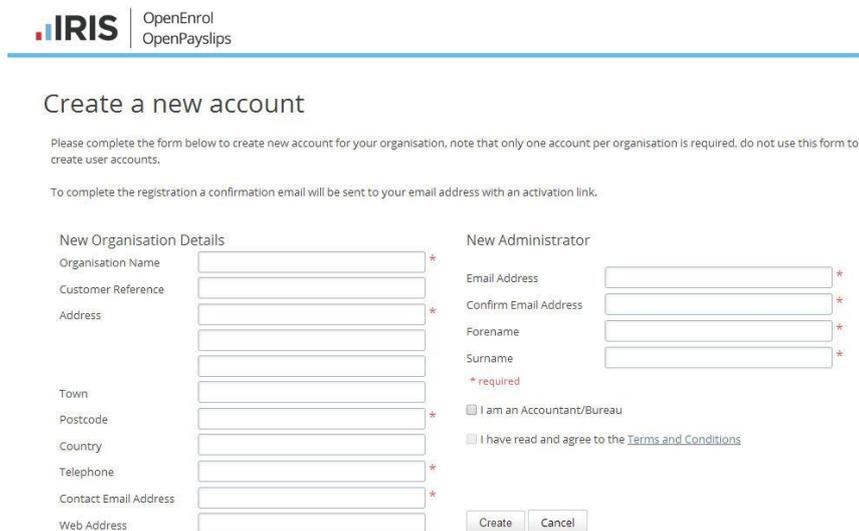


How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website at <https://www.irisopenpayslips.co.uk/>



2. Click **Try Now** to open the following screen:

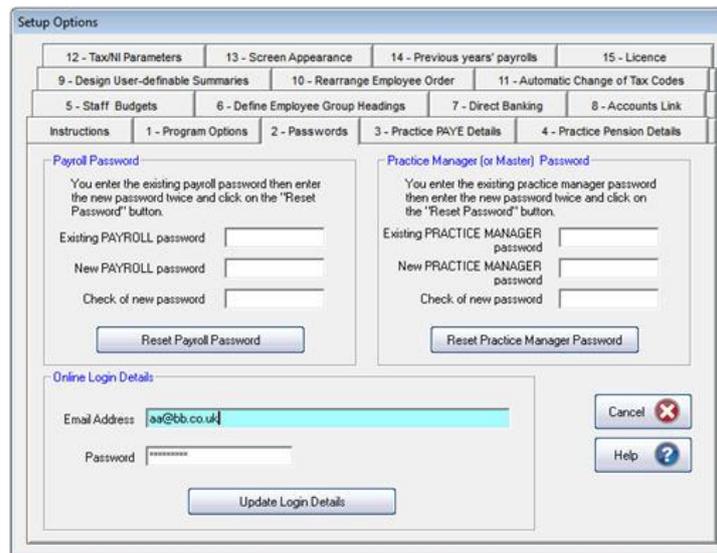


3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator - Email Address**
4. Click the link in the email to be taken back to the IRIS OpenPayslips website
5. Enter a **Password** and click **Set Password**

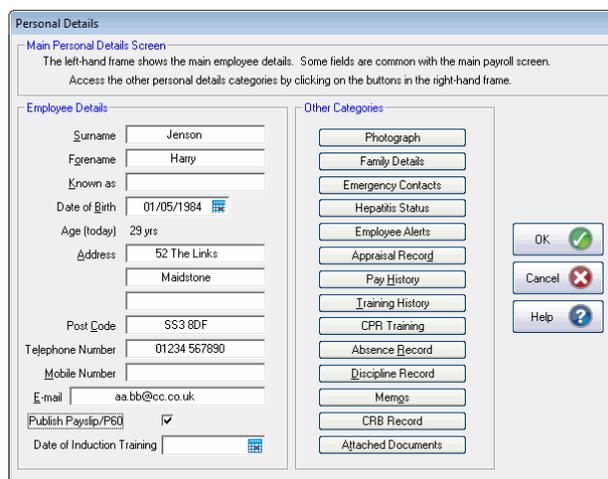
How to update the payroll software

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**



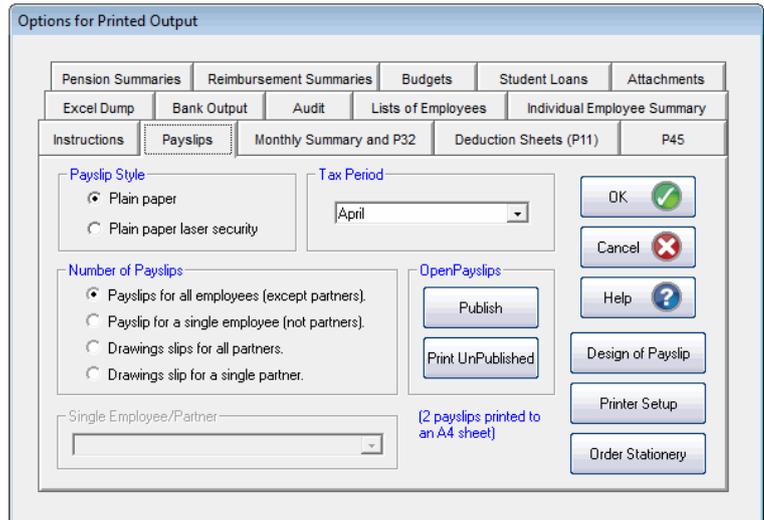
4. Click **Cancel** to return to the main menu
5. Select **Change Employee Details** and then select the **Employee Personal Profile**
6. Make sure all employees have an up-to-date, valid email address in the **Email** field
7. Ensure the **Publish Payslip/P60** box is ticked



How to publish payslips/P60s/P45s to the IRIS OpenPayslips portal

Payslips

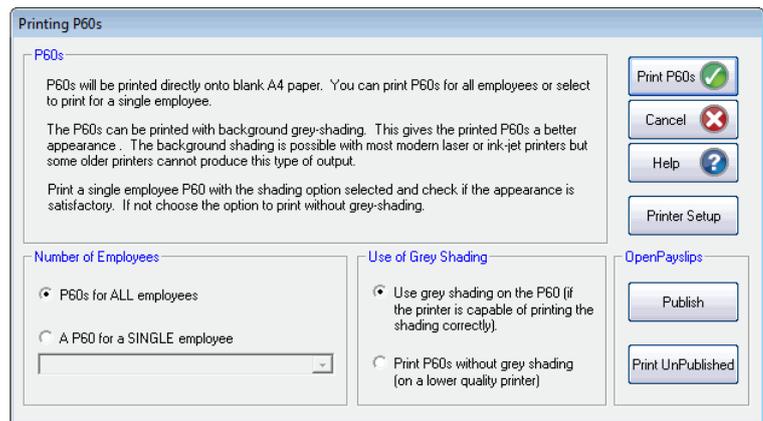
1. Once you have calculated the payroll go to **Print Output | Payslips**
2. Select the **Tax Period** you wish to publish for, then click the OpenPayslips **Publish** button



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

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



Printing P60s

P60s

P60s will be printed directly onto blank A4 paper. You can print P60s for all employees or select to print for a single employee.

The P60s can be printed with background grey-shading. This gives the printed P60s a better appearance. The background shading is possible with most modern laser or ink-jet printers but some older printers cannot produce this type of output.

Print a single employee P60 with the shading option selected and check if the appearance is satisfactory. If not choose the option to print without grey-shading.

Number of Employees

P60s for ALL employees

A P60 for a SINGLE employee

Use of Grey Shading

Use grey shading on the P60 (if the printer is capable of printing the shading correctly).

Print P60s without grey shading (on a lower quality printer)

OpenPayslips

Print P60s ✓

Cancel ✗

Help ?

Printer Setup

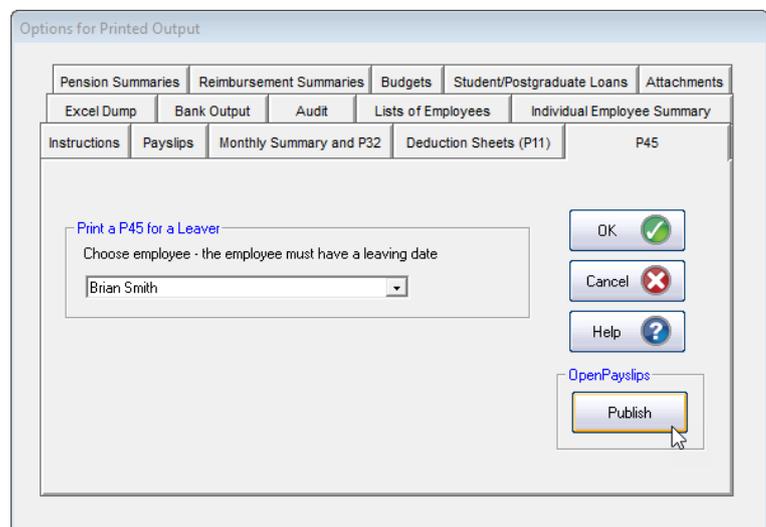
Publish

Print UnPublished

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



Options for Printed Output

Pension Summaries	Reimbursement Summaries	Budgets	Student/Postgraduate Loans	Attachments
Excel Dump	Bank Output	Audit	Lists of Employees	Individual Employee Summary
Instructions	Payslips	Monthly Summary and P32	Deduction Sheets (P11)	P45

Print a P45 for a Leaver

Choose employee - the employee must have a leaving date

Brian Smith

OK ✓

Cancel ✗

Help ?

OpenPayslips

Publish

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

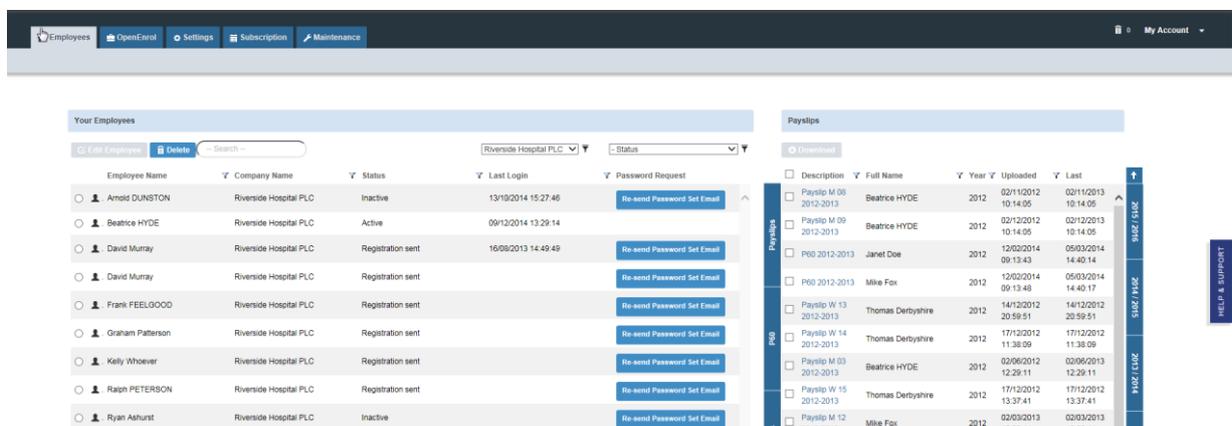
How the employer views the published payslips/P60s/P45s

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)



The screenshot shows the IRIS OpenPayslips web interface. At the top, there are navigation tabs: Employees, OpenEnrol, Settings, Subscription, and Maintenance. The main content area is divided into two sections: 'Your Employees' and 'Payslips'.

Your Employees section:

Employee Name	Company Name	Status	Last Login	Password Request
Arnold DUNSTON	Riverside Hospital PLC	Inactive	13/10/2014 15:27:46	Re-send Password Set Email
Beatrice HYDE	Riverside Hospital PLC	Active	09/12/2014 13:29:14	
David Murray	Riverside Hospital PLC	Registration sent	16/08/2013 14:49:49	Re-send Password Set Email
David Murray	Riverside Hospital PLC	Registration sent		Re-send Password Set Email
Frank FEELGOOD	Riverside Hospital PLC	Registration sent		Re-send Password Set Email
Graham Patterson	Riverside Hospital PLC	Registration sent		Re-send Password Set Email
Kelly Whoever	Riverside Hospital PLC	Registration sent		Re-send Password Set Email
Ralph PETERSON	Riverside Hospital PLC	Registration sent		Re-send Password Set Email
Ryan Athurst	Riverside Hospital PLC	Inactive		Re-send Password Set Email

Payslips section:

Description	Full Name	Year	Uploaded	Last
Payslip M 08 2012-2013	Beatrice HYDE	2012	02/11/2012 10:14:05	02/11/2013 10:14:05
Payslip M 09 2012-2013	Beatrice HYDE	2012	02/12/2012 10:14:05	02/12/2013 10:14:05
P60 2012-2013	Janet Doe	2012	12/02/2014 09:13:43	05/03/2014 14:40:14
P60 2012-2013	Mike Fox	2012	12/02/2014 09:13:48	05/03/2014 14:40:17
Payslip W 13 2012-2013	Thomas Derbyshire	2012	14/12/2012 20:59:51	14/12/2012 20:59:51
Payslip W 14 2012-2013	Thomas Derbyshire	2012	17/12/2012 11:38:09	17/12/2012 11:38:09
Payslip M 03 2012-2013	Beatrice HYDE	2012	02/06/2012 12:28:11	02/06/2013 12:28:11
Payslip W 15 2012-2013	Thomas Derbyshire	2012	17/12/2012 13:37:41	17/12/2012 13:37:41
Payslip M 12 2012-2013	Mike Fox	2012	02/03/2013 10:20:11	02/03/2013 10:20:11

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**



The screenshot shows a web form titled "Edit Employee Details" with a close button (X) in the top right corner. The form is divided into two main sections. On the left, under the heading "Employee Details", there are three input fields: "First Name" containing "Arnold", "Last Name" containing "DUNSTON", and "E-Mail Address" containing "arnold.dunston@riverside.co.uk". Below these fields are two buttons: "Update" and "Cancel". On the right side of the form, there is a placeholder for a practice image, showing a grey silhouette of a person and the text "No Practice Image".

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

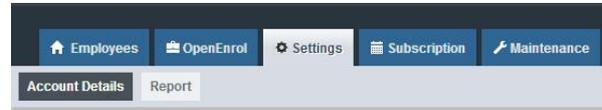
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish paylips/P60s

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.