

Customer benefits

New product updates, functionality and offers included with IRIS Payroll software and services



The only choice for UK payroll users

With over 35 years' experience, IRIS is the UK's leading provider of fully integrated payroll solutions. IRIS offers customers the greatest choice of specialist payroll software and services managed under three leading brands - IRIS, Earnie and KashFlow.

We take the time to forge lasting relationships with our customers, built on trust and our desire to see them succeed. That is why IRIS customers continue to work with us year after year.

By focusing on the UK payroll sector, we have an unrivalled understanding of the regulatory challenges and pressures that businesses face. We use our deep domain expertise to deliver world-class software and services that give our customers tangible business benefits.

The Earnie brand is for enterprise customers. The IRIS brand is for SMEs and accountants and the KashFlow brand is for micro SMEs.

Our vision is to

"Connect businesses and their employees, enabling them to efficiently manage their payroll and compliance requirements to achieve success."

We strive to maintain a culture of excellence in everything that we do, with the single purpose of ensuring our customers' success - every day.

IRIS is working hard to ensure that we provide the technology and skills to enable you to respond to these challenges.

UK payroll has recently undergone unprecedented changes to legislation including the introduction of Real Time Information (RTI) and automatic enrolment.

We organise our products into three product families designed to meet all your compliance needs more efficiently, increase productivity through better business decisions and to improve payroll communications with your employees, using the cloud. In the last 18 months we have increased our support team by another 32% and continue to invest heavily in training and development so that our employees are fully trained.

During the last 12 months we have delivered two major IRIS payroll

software releases that embraced over 790 software changes. The majority of these changes have been centred on compliance to ensure that you are meeting HMRC and TPR (The Pensions Regulator) requirements.

In this booklet we aim to highlight the major changes, to ensure you understand these capabilities and are able to take advantage of them. We will also highlight a series of benefits that you may not be aware of. Did you know that you can have a free 30 day trial of IRIS OpenPayslips online payslip and P60 delivery service?

We hope you find this booklet useful in expanding the adoption of all the new capabilities of IRIS in your business and maximising business value in your organisation every day.

If you have questions about any of these benefits or capabilities please feel free to call IRIS on **0843 357 1803** or the Earnie team on **0844 815 5677**

Recent changes to IRIS Payroll Solution

As a UK owned and operated business, IRIS understands UK compliance better than anyone. Our employees represent the largest body of knowledge of UK legislation and compliance for payroll, accountancy and HR. We always ensure that our software delivers compliance before HMRC and The Pensions Regulator (TPR) make the legislation mandatory. Below are some of the major legislative changes we have introduced to our software to ensure you remain legally compliant.

Revisions on National Insurance

From April 2016, employers will not be required to pay Class 1 secondary NICs on earnings up to a new Apprentice Upper Secondary Threshold (AUST) for apprentices aged under 25. The NI letter 'H' has been added to your software. In addition to this, COSR NI Rate letters will be automatically replaced when changing tax years from 2015/2016 to 2016/2017 to align with the abolishment of contracted-out workplace pension schemes.

Deferral National Insurance Rates

An employee on a deferral NI rate must spend the whole tax year on that rate. The only deferral rates in use from 2016 - 2017 are J and Z (under 21). All others are no longer in use due to the removal of contracted out pension schemes.

Scottish Tax Codes

The Scottish Rate of Income Tax (SRIT) is a new power introduced in the Scotland Act 2012, allowing the Scottish Parliament to alter the amount of income tax paid by Scottish taxpayers. From April 2016 all residents of Scotland will be identified with a Regime Indicator and be subject to potential new rates and parameters for their tax calculation.

Statutory Payments

Additional Statutory Paternity Pay ceased being payable to employees where the baby due or placement date was before 5 April 2014. This will not be paid in tax year 2016/2017 and has now been completely removed from the payroll software.

Student Loans

Income Contingent Repayment Plan Type 2 is in addition to the existing student loan repayment (known as plan 1) for either:

- loans taken out by students on, or after 01 September 2012.
- the new 24+ Advanced Learning Loans available for mature students in England.

The repayment threshold for Plan Type 2 loans is £21,000. The Plan 1 threshold is increasing to £17,495.

RTI Full Payment Submission changes

A new scheme has been added to the payroll software for the 2016/2017 tax year including Flexible Pension Rights, Pension Death Benefit and Scottish Tax Regime.

Pensions

Re-enrolment is the process of putting workers back into pensions automatically. This occurs approximately three years after staging and then every three years after that. A new letter type L1R will be published to the IRIS OpenEnrol element of the IRIS AE Suite™.

Other Legislative Changes

Direct Earnings Attachments (DEAs) are notices issued to employers by the DWP requiring them to make deductions from an employees pay to recover outstanding debts to DWP. The payroll software will include a new Higher DEA Deduction allowing you to apply the higher rates. In addition to this, the maximum amount of Employment Allowance is increasing to £3,000 per year from April 2016.

Support

A new Support feedback survey has recently launched and will be sent following every call to Support. The insight gathered will help us better monitor the level of service delivered and quickly make changes if appropriate.

To improve the service offering further, we are constantly monitoring the Support wait times. If you compare January 2015 to August 2015 versus the same period last year the average wait has reduced to minutes. This means your calls are being answered quicker than ever and 90% of calls are resolved on the first call.

Since April, instead of emailing, you will be notified when you start your payroll of any relevant and important announcements through a brand new messaging service. To keep your payroll running smoothly, you will always be notified if a newer version of your software is required which can then be auto downloaded.

We have continued to improve the quality of service offered by the Support team by encouraging staff to spend more time on self-development, with the aim for continued improvement.



"Every time I have used the email and telephone support for any questions I may have had, it has been excellent. The team are really good and have helped me with any queries I have had."

Fiona Weir, Office Manager, amipak



KnowledgeBase

We added hundreds of new online KnowledgeBase articles for self-help of simpler issues based on what you were searching for. In April 2015 alone there were over 40,000 unique views.

Research and Development

We have heavily invested in our research and development team. The team has grown by over 20% to ensure that we can deliver compliance and innovation. We have put our development team through formal qualifications ensuring that they are CIPP qualified and are experts in payroll.

Account Management

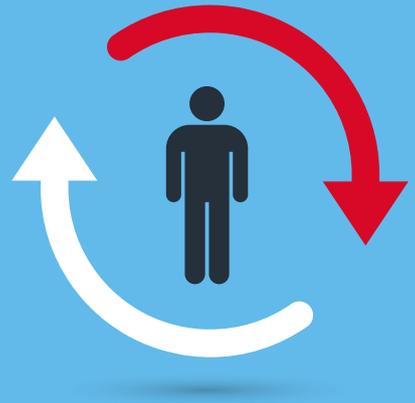
Those Earnie customers with the largest and most complex payroll needs have a dedicated account manager who is on hand to build close working relationships with their customers. They take the time to fully understand your business, with a consultative approach they will provide you with tailored solutions to best fit your business needs. They can have access to all parts of our payroll organisation as well as executive management to ensure you receive the best possible support.

Training Courses

IRIS recognises that keeping up to date with the latest legislation changes is difficult, which is why we offer a range of training courses throughout the UK as well as free online webinars to support your business. There have already been over 9,000 people registered on the IRIS auto enrolment training courses. We offer both legislation and product specific courses ensuring there is a course right for you. We also offer regular bite-size free training both live and on-demand. The on-demand bite-size webinars can be found at iris.co.uk/ondemand

Consultants

IRIS consultants have years of experience and can provide on-site training and assessments to ensure that you are making the most of your payroll, while ensuring you are compliant. Due to the increased demand for this service we have doubled the size of our training and consultancy team. We are now able to offer you with more dates and availability than ever before, just ask for more details.



"IRIS are always at the forefront of legislation changes which I think is unique of them compared to other payroll providers."

Margaret Millar, Payroll Manager, Expro Group

IRIS Automatic Enrolment Credentials



IRIS launched its first automatic enrolment software solution in May 2013 and since then IRIS has successfully helped over 5,700 employers stage and assess over 559,000 employees. Through this experience IRIS has built the knowledge and expertise to help any business successfully stage.

To fully automate automatic enrolment within our range of payroll software has been a significant undertaking. During the development of this functionality, it became evident that more research and development was required than originally envisaged.

To give you an idea of the magnitude and complexity, IRIS has expended over £1 million to develop automatic enrolment functionality in our payroll software. Whilst the initial work is now complete, TPR has made IRIS aware of future changes and we will need to continue to update the functionality to ensure compliance. Over and above the research and development expenditure, IRIS will also be investing in support personnel and expertise to assist customers familiarise themselves with new automatic enrolment software. By FY17, the planned expenditure in automatic enrolment development and support will exceed £2 million.

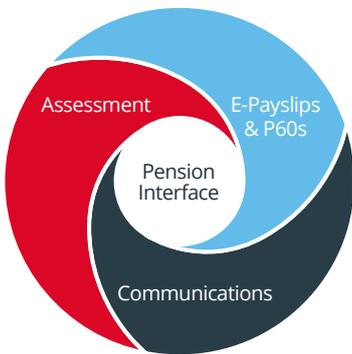
All 180 personnel in the payroll division have and will continue to undergo regular training on automatic enrolment. The training is further supplemented by visits from the three main multi-employer pension providers, NEST (National Employment Savings Trust), Now: Pensions and the People's Pension.

TPR have also run training sessions for all our Payroll Sales, Development and Support personnel. This ongoing and continuous program of professional development for our sales specialists, support staff and developers is vital to ensure IRIS remains at the forefront of this complex legislation which continues to change. We work closely with TPR when developing automatic enrolment software. TPR regularly review the detailed designs and operation of our software to ensure we are compliant.



IRIS AE Suite™

- leading auto enrolment solution'



The IRIS AE Suite™ comprises of three elements Assessment, Communications (pension letters) and Electronic Payslips and P60s. The solution integrates with your IRIS payroll software helping you comply with workplace pensions legislation.

Brand new: AE Simplification Tool

The AE simplification tool is there to help you setup your auto enrolment solution with your IRIS payroll software. The tool has been developed because it is our aim to always find ways to simplify your payroll and auto enrolment process.

1 Assessment

The assessment component sits within your IRIS payroll software and gives you the ability to:

- Create a nominated automatic enrolment scheme
- Define qualifying earnings & pensionable pay
- Assess your workforce
- Automatically enrol workers into a pension scheme
- Produce pension remittance files
- Produce automatic enrolment files

Pension remittance and automatic enrolment files

We have worked with the major pension providers to ensure that we can produce both the automatic enrolment and pension remittance files. The files allow you to upload your employees' information directly to the provider. The following are included as standard in our software:

- NEST
- NOW
- Scottish Widows
- Peoples Pension
- Aviva
- Friends Life
- The People's Pension
- Standard Life

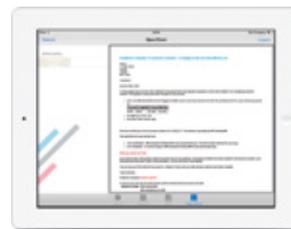
We also have support for AEGON, Legal & General, Pensions Trust, RWA, Scottish Life and Zurich with more being developed every day. If your pension provider is not listed above, don't worry-bespoke pension files can be created upon request.

"Can't imagine why any company wouldn't invest in the IRIS AE Suite™. It is the whole package, our auto enrolment process is so streamlined."
 Carole Arrowsmith, Payroll Administrator, Taylor Bloxham



2 E-Payslips and P60s

Electronically publish payslips and P60s, saving you time, money and the environment. IRIS is the only payroll software provider that allows you to deliver your employees' payslips direct to their smartphone.



3 Communications

The IRIS AE Suite™ takes care of your communication requirements, removing the administration. You can:

- Produce relevant automatic enrolment communications and deliver them directly to your workforce
- Audit facilities for producing compliance evidence

The IRIS AE Suite™ brings all of your communications together in one secure, online location. No more forgotten passwords and jumping between different websites. The IRIS AE Suite™ includes a cloud based portal, where your employees can access their pension communications, payslips and P60s anywhere, anytime.

Value added benefits of your subscription



*Free 30 day trial of
IRIS OpenPayslips*

As part of your IRIS subscription package you are eligible for a free 30 day trial of IRIS OpenPayslips. IRIS OpenPayslips is part of the IRIS AE Suite™ and offers payslip and P60 delivery directly to your employees, at the touch of a button.

The service is charged at a per employee basis, so there are no increased costs for weekly or fortnightly staff and we only charge for the employees who are receiving payslips via the portal.

IRIS OpenPayslips is a truly ground-breaking method of payslip delivery as the platform works on:

- Web
- iPhone/iPad app
- Android app
- Windows Mobile app

You can sign up for your free trial via the IRIS OpenPayslips website: irisopenpayslips.co.uk



Payroll and Bookkeeping in the Cloud

KashFlow Payroll and Bookkeeping provides a fully integrated payroll and bookkeeping solution ideal for small businesses. KashFlow's simple solutions allow you to access payroll and bookkeeping data from anywhere in the world. The service is hosted on our secure platform based in UK data centres. You therefore never have to worry about complicated IT infrastructure or backing up your data. All our solutions comply with data protection conventions and laws.

Because it is in The Cloud you can enjoy 24/7 access and the freedom to run your payroll and bookkeeping tasks from wherever you like. Long gone are the days of not taking holidays in payroll periods or being unable to provide your accountant with key data whilst you are on holiday. KashFlow solutions are ideal for those business people who have busy lifestyles.

Free 14 day trial of KashFlow

To find out more regarding our KashFlow solutions and how you can access a free 14 day trial please visit: iris.co.uk/kashflow

IRIS solutions for payroll

Business efficiency

IRIS OpenPayslips

KashFlow Bookkeeping



Compliance

IRIS AE Suite™

RTI

Micro SME Payroll

GP Payroll & Accounts

SME Payroll

Earnie Enterprise

Common platform - integrated

Best practice services - supported

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counts

e Payroll



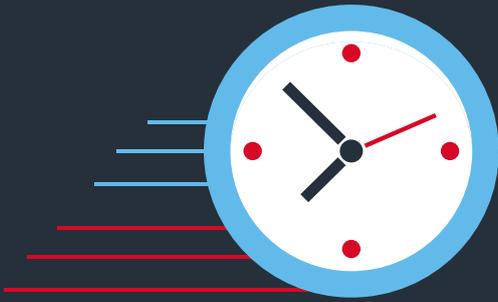
Productivity

Outsourced Payroll
Training
Consulting
Best Use Assessment



ed processes

ort, training, implementation



Business Efficiency

We work hard to try and make our payrolls as simple as possible, so that you can process payroll with ease. We understand that the extra legislative burden is making payroll more time consuming so we have introduced a number of add-on services that can help relieve this burden.

The IRIS AE Suite™ offers workforce assessment, payslip delivery and the creation of automatic enrolment communications with the press of a few buttons. This reduces your processing time and ensures that

your employees receive all payroll communications within minutes of you running the payroll.

KashFlow Bookkeeping and Payroll offers the flexibility of conducting business tasks from anywhere at any time. KashFlow software is specifically designed for small businesses, so they are easy to use and ideal for those who run simple payrolls.

Our range of solutions provide you with the tools to get the job done in a time saving manner. IRIS caters for all sizes of business, from the small to the large.

"The IRIS AE Suite™ is such an easy to use package, I would definitely recommend it to anyone – it saves us so much time to run"

Anita Billing, Accounts Assistant, Massey Wilcox Transport

"Earnie Executive has certainly streamlined our processes and it will continue to help streamline our processes even further as we become more confident with the use of the software and the different aspects that are a part of it"

Emma Paton, Group Personnel Manager, Belmont Group



Compliance

IRIS has 35 years' experience in providing compliance solutions for UK payroll users and as a market leader no other supplier is better placed to ensure your business stays ahead of the legislation.

Our market leading suite of payrolls provides simple and effective solutions, taking the headache out of payroll. We have full automatic enrolment and RTI compliant solutions that reduce the administrative burden of payroll.

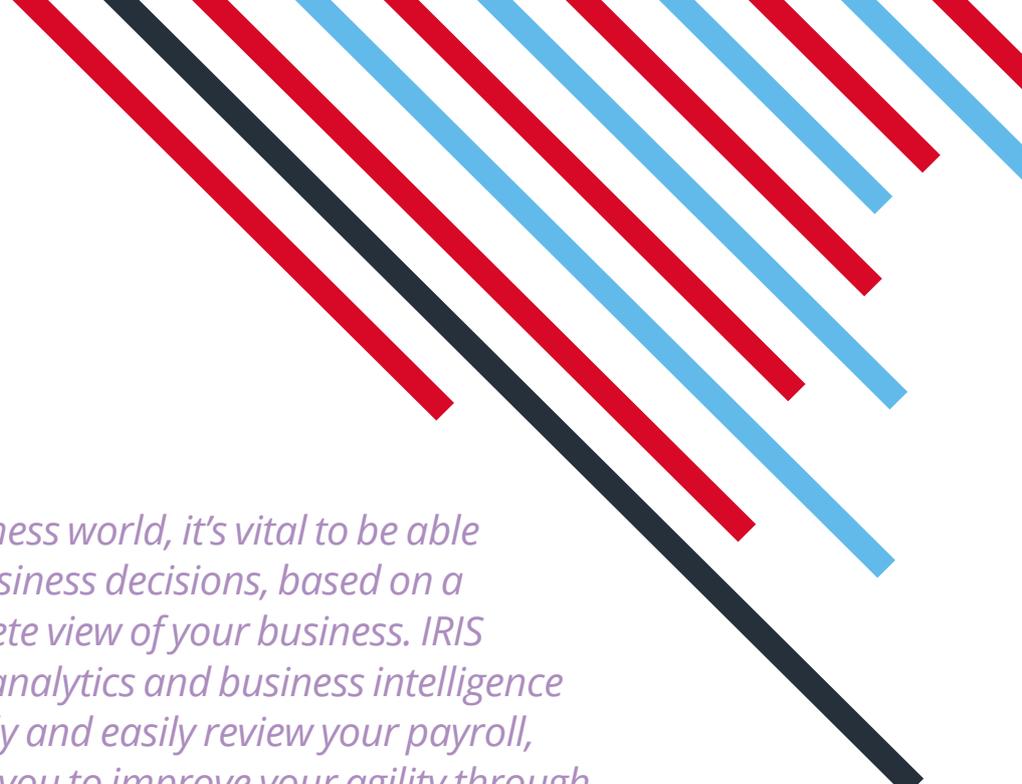
IRIS are responsible for submitting RTI for almost 1 in 5 UK companies. We work closely with HMRC and TPR to ensure that you are meeting your payroll legislative requirements. We have a dedicated legislation team who are heavily involved in steering groups and at the forefront of any up and coming changes.

"We've been using the IRIS AE Suite™ and IRIS OpenPayslips to produce and distribute our payslips for a number of months now and are pleased with the results. It saves us a lot of time and helps reduce waste. Automatic enrolment is very complex and we have complete confidence that the IRIS AE Suite™ will ensure our clients are compliant."

*Andrew Bodkin, Managing Partner,
Haines Watts.*

"The IRIS AE Suite™ helps ensure that you comply with the regulations. Not only does that make my job easier but it is also an important aspect for the business. Staying compliant doesn't just mean avoiding fines and warnings, it also means that the business is more functional and doesn't have any comeback at all from The Pensions Regulator."

Fiona Weir, Office Manager, amipak



Productivity

In today's fast moving business world, it's vital to be able to make rapid, accurate business decisions, based on a comprehensive and complete view of your business. IRIS provides you with reports, analytics and business intelligence tools enabling you to quickly and easily review your payroll, accounts and HR, enabling you to improve your agility through fully informed decision making. We offer a number of solutions that can make your payroll run more efficiently.

The IRIS Managed Payroll Service provides an opportunity to outsource your payroll to our dedicated team. IRIS have nearly 500 customers using IRIS managed payroll service, helping to pay over 11,000 employees. Our service is simple, you provide the data and we do the rest, truly taking the headache out of payroll.

Our dedicated training team ensure you know the most efficient way of running your payroll. The training portfolio is continually developing and we are always updating our courses to ensure that you have access to the latest payroll developments. We offer both classroom and onsite consultancy to ensure you have a training solution suitable for your business.

Over 466,000
*users of our
cloud applications*

"I can't recommend Earnie enough, it is a really good piece of software that is very easy to use and it saves me so much time. This time I can use to focus on other aspects of my job."

Gill Kirk, Payroll Manager, Microlise

"Yes, I would recommend the IRIS AE Suite™ no doubt about it. Especially now because it is so straight forward to use. I recommend the IRIS AE Suite™ to businesses of our size and in particular our industry. In terms of the electronic communications, they are essential because the programme automatically creates and sends as required."

Rhonda Smyth, Administrator, Rylands Nursing Home

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“Connect businesses and their employees, enabling them to efficiently manage their payroll and compliance requirements to achieve success.”

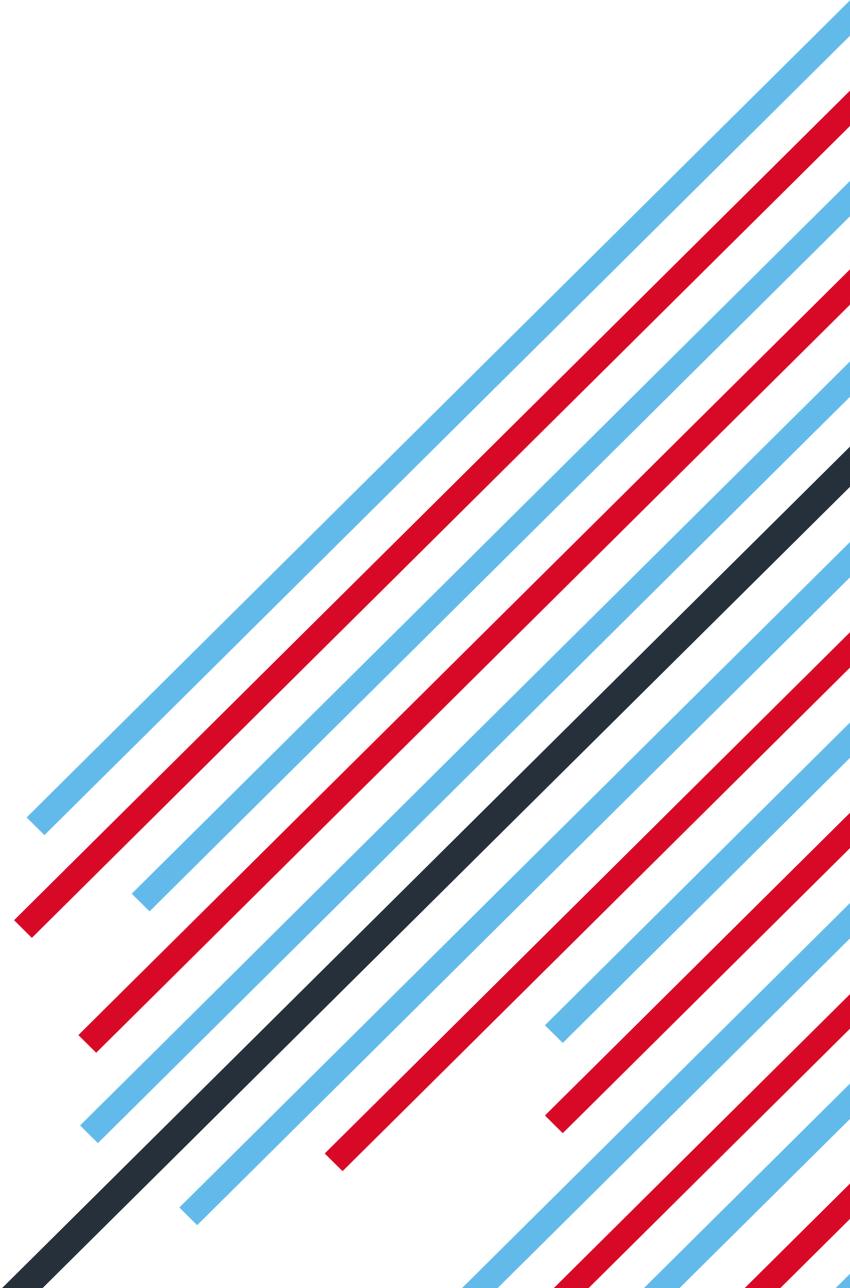
Customer benefits

We are pleased to offer renewing payroll customers these benefits:

- Compliance guaranteed - access to the latest legislative updates each year
- 30 day free trial of IRIS OpenPayslips when using any IRIS payroll product
- Receive benefits every time you refer a friend to IRIS.
See iris.co.uk/referralrewards
- 14 day free trial of KashFlow online bookkeeping solution
- Watch free on demand webinars at iris.co.uk/ondemand
- Free automatic enrolment health check
- Flexible training options
- Access to a qualified UK support team and online support materials
- 24x7 Access to the Knowledgebase: iris.co.uk/support/knowledgebase/
- Free entry to IRIS events
- Free bite-size support training

Earnie customers:
Contact us on **0844 815 5677**
earniebenefits@iris.co.uk

IRIS payroll customers:
Contact us on **0843 357 1803**
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