



# IRIS Payroll

Remote Payroll Entry

Remote User's Guide

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IRIS. Look forward

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## What is Remote Payroll Entry?

The Remote Payroll Entry (RPE) app is a cloud-based tool, which enables users to safely and easily send payroll information to their third-party payroll administrator, such as a Bureau or Accountant, without having to complete complex spreadsheets.



Via the RPE app, you will be able to:

- Enter new starter information
- Create leavers
- Process static employee information such as changes to bank details or salary changes
- Enter variable pay information, such as hourly pay rates and overtime
- Submit the information to your payroll administrator at the touch of a button

You are also able to enter and save information whilst offline and upload it via the cloud later.

This guide will give you a general tour of RPE, with more detailed sections later describing how to carry out particular tasks.

You should have received a welcome email advising you of:

- How to download the app
- Your **Username** and a temporary **Password**

The application will prompt you to change your password when you first log in.

You will receive a further email containing your **Username**, plus details of the **Company Name** and **Pay Frequency** for which you will be entering data. You may receive further emails if you are allocated more companies or payroll frequencies.

## Opening RPE

To open the app after installing:

1. Double-click on the **Remote Payroll Entry** icon  on your desktop
2. Enter the **Username** and temporary **Password**
3. The application will prompt you to change your **Password** the first time you log in



## Tour of RPE

### Home

When you log in, the app opens on the **Home** tab. You will see several other tabs and some icons across the bottom.

The icons will change according to which tab you have selected, and some will be faded if that function is currently unavailable. For example, **Save** may be faded out if no changes have been made.

In the centre are cards, displaying information about the Companies and Pay Frequencies that you have been allocated.

If more than one company has been allocated to you, a **Select Company** box will also be visible, to allow you to switch between companies. This is where you will get your new timesheets and submit data to payroll.

You can also click  to save the data you are working on to the cloud as back up, and retrieve it, for example from another PC, by clicking



### New Employees

When you click on the **New Employees** tab, the screen will change to allow you to add new employees to the payroll.

### Delete an employee

If you set-up an employee in error, use the delete facility to remove the record.

To delete one or more employees:

1. Ticking the **Delete** box for each individual
2. Once you have made your selection(s), click Save or Save **& Close**
3. A confirmation message will then be displayed, click **Yes** to delete the selected employee(s)

Deleting an employee from Remote Payroll Entry will create a **Payroll Instruction** for when you submit your timesheet to your Accountant/payroll administrator.

## Delete History

This new function allows you to delete the history for all RPE information up to and including the previous tax year.

To delete history:

1. From the **Delete History** drop-down list, choose the tax year you want to delete records up to and including \*
2. Click **Save** or **Save & Close**
3. A confirmation message will then be displayed, click **Yes** to delete the history

\* You can delete history up to and including the previous tax year

## Bulk Employee Amendments

The information you enter here will change the standard amounts, such as salary, which appears in each payroll for an employee. The grid view enables you to enter information for several employees at once. If you change an hourly rate, for instance, Admin, this will change the rate, regardless of the Factor for that employee.

## Amend Existing Employees

This tab displays a card for each employee on the payroll, containing their **Name, Code** and **Department**:

Readman Emily
Code
1
Department

To edit, double-click or select the relevant employee then click the **Edit** button. The screen will change to show a more detailed form for that employee. Enter changes into this form.

There are four employee tabs to edit:

### General

Personal details such as **Name, Date of Birth, Address**

### Employment

Employment details such as **NI Number, Tax Code**

### Bank

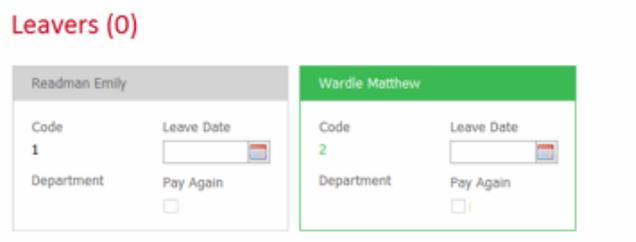
Bank Account information

## Pay Elements

Pay rates, payments and deductions

## Leavers

From this screen, you can make an employee a Leaver. The cards of every employee on the payroll will be displayed, including any new employees you have added. You can change this to a grid view if you want to. The **Pay Again** box is ticked by default – this will pay the employee in this pay period, untick if required.



The screenshot shows a screen titled "Leavers (0)". It displays two employee cards side-by-side. The left card is for "Readman Emily" and has a grey header. The right card is for "Wardle Matthew" and has a green header. Both cards have the following fields: "Code" (with values 1 and 2 respectively), "Leave Date" (with a date picker), "Department", and "Pay Again" (with an unchecked checkbox).

## Payroll Entry

This is where you will enter the payroll variations. You will see a grid containing employee names, Hourly Rates etc.

## Payroll Instructions

Use this screen to enter any notes or information you need to pass on to your payroll bureau or accountant regarding a particular employee. Type directly into the box on the employee's card.

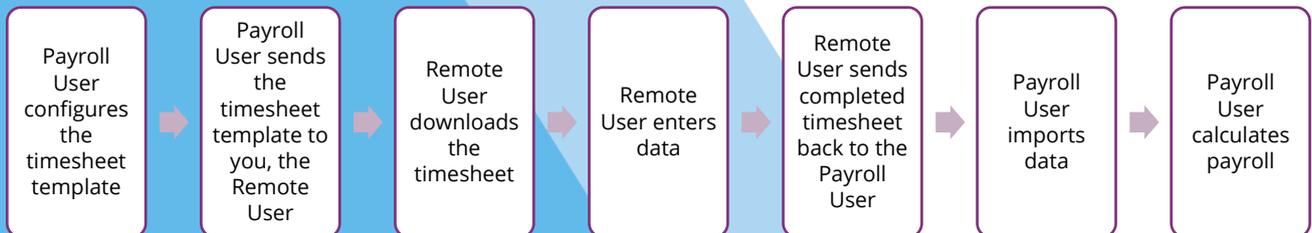
## Options

If you do not have access to the Cloud, the payroll user can email you a **.json** file to give you access to a pay period. You need to import that file using  this icon.

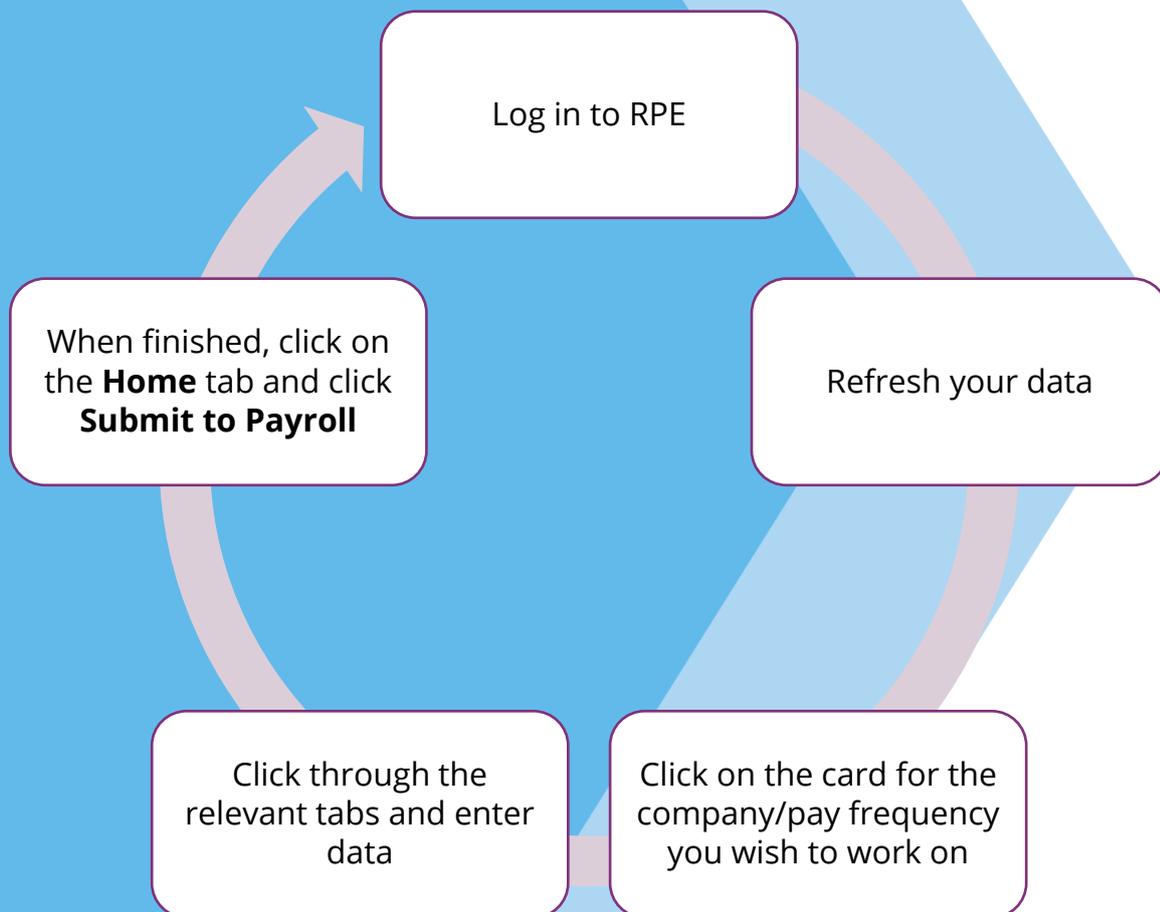
If this happens, once you have finished inputting, you will need to export the information you have entered from this screen and attach it to an email (instead of submitting it via the cloud).

## Using RPE

This is the basic process for using Remote Payroll Entry. The Payroll User is the payroll administrator at your payroll bureau, or accountant, for example. The Remote User is the person using the Remote Payroll Entry app.



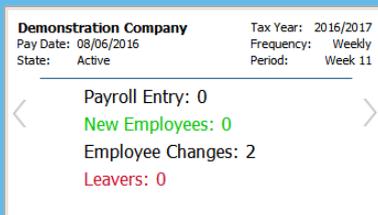
So, as the Remote User, your basic process would go something like this:



## Refresh your data

You need to make sure the data and timesheet you are working on are the most up to date. The payroll administrator may send you a new timesheet while you are already using the app. To do this:

1. Click the  refresh icon in the top right corner to obtain any new data that may be waiting for you
2. Click on the card containing the data you are going to work on:



3. You are now ready to go!

## Add a new employee

To add a new employee:

1. Click on the **New Employees** tab
2. Click on either the **Add New Employee** card



or the  icon to open a blank employee form

3. Click into the relevant fields and type directly into the form
4. Click  to save the data locally as you go
5. Click **Save & Close** to save and close the employee form

## Make bulk employee amendments

To make changes to employee standard information in bulk:

1. Click on the **Bulk Employee Amendments** tab
  2. Enter the values directly into the grid
  3. Click **Save** to save the data on your local machine
- You can click the arrow on the right of the screen to change which columns are visible and save as a new template to use again in the future
  - You can click the arrow at the bottom of the screen to select different templates you have set-up

## Amend an existing employee

To make permanent changes to a particular employee:

1. Click on the **Amend Existing Employee** tab
2. The screen will display all current employees
3. Double-click on the employee you wish to update
4. The screen will change to show a more detailed form for that employee. Enter your changes directly into the form. You only need to enter the information that has changed, you can leave the rest of the form blank
5. Click **Save** to save locally as you go and then **Save & Close** (or **Cancel** if you don't want to save your changes) to close the current employee

## Create a leaver

When you need to create a leaver:

1. Click on the **Leavers** tab
2. The screen will display all current employees
3. Enter a **Leave Date** for an employee, the **Leavers | Pay Again** option will be ticked by default. This is because most employers want to pay employees in the pay period that they leave. Untick this if necessary
4. Click **Save** when you are done to save locally

## Enter payroll data

To enter the payroll variations:

1. Click the **Payroll Entry** tab
  2. Enter the values directly into the grid
  3. Click **Save** to save locally
- You can click the arrow to the right of the screen to change which columns are visible and save that view as a new template to use again in the future
  - You can click the arrow at the bottom of the screen to choose between the different templates you have set-up

## Add payroll instruction

If you have any notes or instructions to pass on regarding particular employees:

1. Click the **Payroll Instructions** tab
2. Type the notes directly into the **Payroll Instruction** box belonging to the relevant employee
3. Click **Save** to save locally

## Send data to Payroll

When you have finished entering all the changes and payroll variations:

1. Click on the **Home** tab
2. Click on **Submit to Payroll**

## Locked Period

If a pay period has been locked, a lock symbol will be displayed on every screen to make it easier to identify that the period is locked, and you can no longer enter any data.

## FAQS

- What do I do if I **Submit to Payroll** before I have finished entering the information for a particular pay period?

You will need to contact your Bureau/Accountant to let them know. If they have imported the data and calculated the payroll, the data will be closed for you. They will need to undo payroll and delete the timesheet data. You will then be able to click the **Refresh** icon in the app and continue editing

- Can I use the app on different computers?

Yes! When you have finished entering information, on the **Home** tab, click on **Save to Cloud** icon and log out of the app. You will then be able to continue on a different computer, with the app installed, by logging into the app and on the **Home** tab clicking **Retrieve from Cloud**

## Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	Tel: 0300 200 3200
Fax: 0844 366 7828	Tel: 0300 200 3211 (new business)
Email: helpdesk@ir-efile.gov.uk	

## Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls	For IRIS Payroll Professional
Tel: 0344 815 5656	Tel: 0344 815 5676	Tel: 0345 057 3708
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk	Email: payrollsales@iris.co.uk

## Contact Support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS GP Payroll	0344 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5671	earniesupport@iris.co.uk
IRIS Payroll Professional (formerly Star)	01273 715300	payroll-support@iris.co.uk

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