

# **IRIS Payroll**

Guide to setting up IRIS  
myePayWindow

October 2020

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## Dear Customer,

Welcome to your guide to setting up and using the myePayWindow.

The Guide contains instructions on setting up the cloud portal for the following elements:

1. **myePayWindow Payslips, P60s, P45s and Pension letters**

## What is IRIS myePayWindow?

IRIS myePayWindow is a payroll self-service portal, used to securely exchange documents and deliver payroll information to employers and employees, every single payroll cycle. Employers and employees can view the published documents, in a secure online portal, using their own separate login details.

There are three different myePayWindow accounts available:

- Payroll Department
- Employer
- Employee

**Note:** Every company needs to have a Payroll Department User. This is in effect the 'admin user', who has full access and can view all payroll companies, as well as configuring privileges to suit all other users.

Once you have created the Payroll Department user you can publish from payroll.

## What will IRIS myePayWindow do for me?

- Process and distribute payslips, Automatic Enrolment communications, P45s and P60s simply, securely, and efficiently
- Allows employees to access payslips, P45s, P60s and pension letters from any location and device
- Allows you to customise your client/employee portal to your corporate colours and logos so clients recognise your branding, not your software vendor
- Quick and easy to setup – invitation emails sent in bulk, allowing users to register from their preferred device
- Increases Automatic Enrolment administration efficiency
- Reduces carbon footprint, demonstrating an environmentally friendly solution
- Reduces communication distribution costs including printing, postage, and processing
- Fully secure online portal, complete with Industry-standard SSL, 2-factor authentication, and encryption during transit
- GDPR compliant
- Employees have 24/7 access to current and historic communications
- Free IOS, Android and Windows Phone apps available for employees to securely view their own pension communications on tablets or smartphones

## Steps to setting up and using IRIS myePayWindow



# How to setup an IRIS myePayWindow account

## Payroll Department Account

The Payroll Department account is where the 'main user' can see and add clients/employers and their employees. They can also create additional staff users, along with their access privileges and client groups.

## Registration

1. Once you have signed up for the IRIS myePayWindow Payroll Department account, you will receive an email invitation. Click the link to the portal to start the registration process

# my@PayWindow

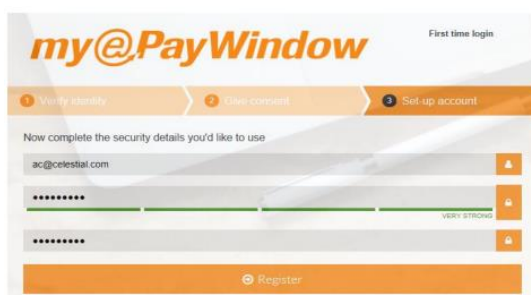
## Payroll Department Invitation

Welcome to myePayWindow

2. Go through the on-screen prompts to verify your identity, give consent and setup the account
3. Enter all details accurately including date of birth and secret key. The first user will receive authentication details from IRIS, with every subsequent user being created by a payroll department user (who is responsible for sharing the information with invited users)
4. You can then set up your Username and Password

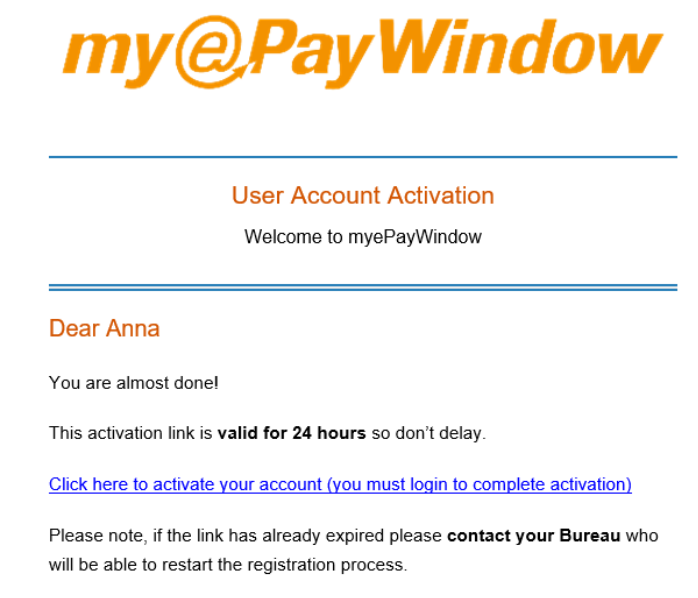
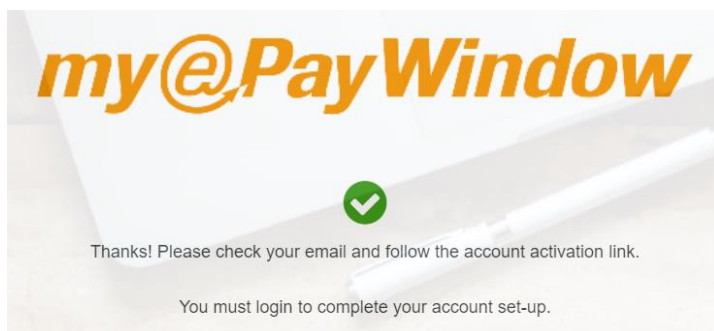
The username is a minimum of 6 characters

The password is a minimum of 8 characters – 1 upper case, 1 lower case, 1 special and 1 numeric

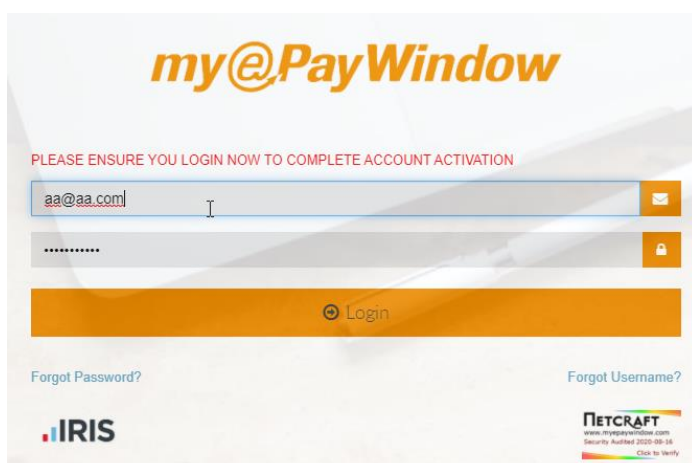


The screenshot shows the 'my@PayWindow' registration interface. At the top, it says 'First time login'. Below that, there are three steps: 1. Verify identity, 2. Give consent, and 3. Set-up account. The 'Set-up account' step is currently active. The interface prompts the user to 'Now complete the security details you'd like to use'. It shows a username field with 'ac@celestial.com' and a password field with a strength indicator showing 'VERY STRONG'. There is a 'Register' button at the bottom.

5. Click **Register**
6. An Account Activation email will be sent containing an activation link, if this link is not used within 24 hours the registration will need to be restarted from the invitation email link

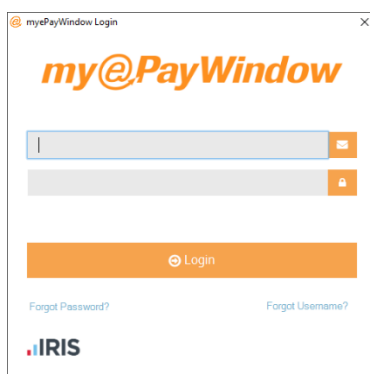


Click on the activation link, this will take you to the login screen where you can log in using your username and password to complete the registration process



## How to Publish to myePayWindow

1. Log into IRIS Payroll. From the **Company** menu select **Company Details | Open IDs**. From the **myePayWindow** section, select **Use myePayWindow**  
  
**(Please Note:** once you have done this, you will no longer be able to use IRIS OpenPayslips)
2. When you are ready to Publish, (in this example we will use payslips) go to **Reports**, select the required **Pay Frequency** and then choose **Print Payslips**
3. Highlight the payslip output and click **Select** (you can choose any payslip for this function as myePayWindow will use its own payslip template). **Please Note:** bespoke payslip templates are not available in myePayWindow
4. The payslips will be previewed to screen, from the myePayWindow section on the toolbar, click **Publish**
5. On the initial attempt to Publish only, you will be required to enter your myePayWindow login credentials, **Username** and **Password**. Enter the Payroll Department user details registered and click **Login**

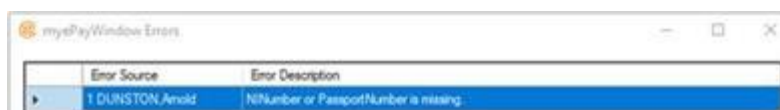


**Please Note:** you can also enter your Login Details for myePayWindow in **Admin**, under **File | Online Login Details | myePayWindow Login Details**. They will be used for all companies published from your payroll account, and will avoid the need to enter details for each company (as above)

6. Once the publish is complete, a confirmation message will be displayed confirming Payslips have been published successfully
7. If errors are identified, and they are Company or Department level errors (or errors in every employee included), the submission will be stopped, and the data will not be published. A message will be displayed confirming there are errors; click **Yes** to view the errors



8. If errors are relating to some employees, a message will be displayed at the end of the publishing process. Again, click **Yes** to view the errors and a myePayWindow Errors screen will be displayed and will show the **Error Source** and **Error Description**



| Error Source      | Error Description                       |
|-------------------|---|
| 1 DUNSTON, Arnold | NI Number or Passport Number is missing |

9. Error Source will show:
- The Company name if it is a company level error
  - The Department name if it is a department level error, or
  - The Employee number if it is an employee level error
10. Once the errors have been resolved, you can republish
11. Once submission is complete, a success message will be displayed
12. The publish process will create the employer and employees with the relevant published documents
13. Log into myePayWindow to set up an Employer user account. As already mentioned, the employer (company) has been created during the publish from payroll

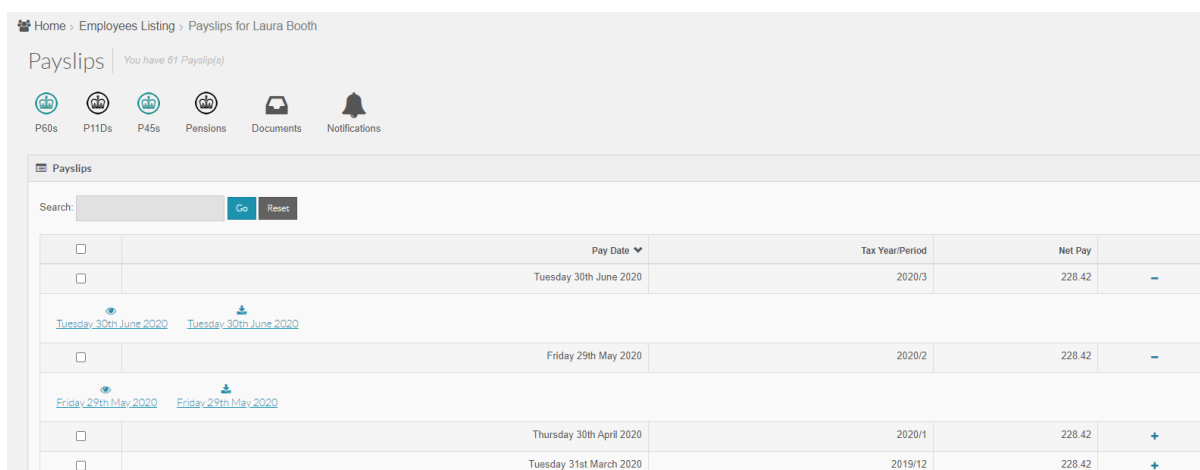
**Please Note:** if you do not Publish from payroll (as in the steps above) on your first login, there will be no Employer information in MyePayWindow

14. Employees are invited automatically (unless you have deselected this default option in myePayWindow). Employee accounts are generated automatically when documents are published, which will include recent leavers. If auto invites is not activated, you will need to send the invites out
15. Employees can then setup their accounts to view/download their published documentation
16. Employer Users must be invited manually in myePayWindow once the publish process is complete

## How the Payroll Department views the published payslips/P60s/P45s

To view the published payslips/pension letters/P60s/P45s:

1. Go to the myePayWindow website at <https://www.mypaywindow.com/> and log in with your registered username and password
2. Select Employers and choose the relevant Employer
3. Choose the document type from **ePayslips**, **Pensions**, **P60** or **P45**, by default this will be ePayslips
4. Select the required date and click on the view icon
5. Choose an employee and click on the + sign to expand the individual
6. For example, click on the + sign, this will give you the option to view or download



Home > Employees Listing > Payslips for Laura Booth

Payslips | You have 61 Payslip(s)

P60s P11Ds P45s Pensions Documents Notifications

Payslips

Search:

| <input type="checkbox"/>  | Pay Date ▼               | Tax Year/Period | Net Pay |   |
|---|--------------------------|-----------------|---------|---|
| <input type="checkbox"/>  | Tuesday 30th June 2020   | 2020/3          | 228.42  | – |
| <a href="#">Tuesday 30th June 2020</a> <a href="#">Tuesday 30th June 2020</a> |                          |                 |         |   |
| <input type="checkbox"/>  | Friday 29th May 2020     | 2020/2          | 228.42  | – |
| <a href="#">Friday 29th May 2020</a> <a href="#">Friday 29th May 2020</a>     |                          |                 |         |   |
| <input type="checkbox"/>  | Thursday 30th April 2020 | 2020/1          | 228.42  | + |
| <input type="checkbox"/>  | Tuesday 31st March 2020  | 2019/12         | 228.42  | + |

7. Click **View** to display the details on screen
8. You can then use the **Previous** or **Next** buttons to scroll through the documents – in this example, the payslips

# How to create an IRIS myePayWindow Employer User Account

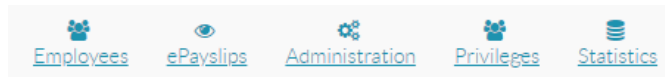
The Employer User Account is where a client/employer can see all the employee documents and data published, subject to the privileges setup by the Payroll Department User.

## To add an Employer User:

1. In myePayWindow, from the side menu select **Employers**
2. Click on the relevant **Name**



3. Select **Administration**



4. Then **Add User**



5. Enter the details for the new user – by default the Privileges will be **All Employers – Full Access**. Highlight **All Employers – Full Access** and click **Add**

**Please Note:** Payroll Department User enters the **DOB** and creates a **Secret Key**. This information must be shared with the Employer user so they can use it in the setup process. These details must be entered accurately as they are validated

6. From the **Administration | Users** tab, you can see the new user. Click on the name to view **Notifications, My Settings, Edit, Invite/Reinvite** or **Delete**. Select **Invite/Re-invite** to send the invitation to the new user
7. A confirmation message will be displayed asking if you are sure, click **Invite**. The **Status** for the user will change to **INVITED**

## Employer User Activation

1. After the Payroll Department User has followed the steps above to create an Employer User, the new user will receive an Employer Invitation email
2. From the email, select the link **Click here to Register**
3. A myePayWindow will open where you need to enter your details to verify your identity (the Secret Key is created by the Payroll Department User who will also provide the DOB)
4. Enter the details and click **Verify your identity**
5. This will open the **Give consent** tab. Read the Data Protection, Terms and Conditions and Privacy Policies and when you are happy, click **I agree**
6. From the **Set-up account** tab, enter the **Username** and **Password** you would like. You will need to enter the Password again in the **Confirm Password** field
7. Click **Register**
8. A further email will be received with an account activation link. This link is valid for 24 hours, if it is not used within 24 hours, the registration will need to be restarted from the invitation email link. Select the link to activate your account
9. Login into myePayWindow with the **Username** and **Password** you created. This will open myePayWindow on the **Employer Dashboard**



The screenshot shows the 'my@PayWindow' registration interface. At the top, it says 'First time login'. Below this is a progress bar with three steps: '1 Verify identity' (active), '2 Give consent', and '3 Set-up account'. The main heading is 'We need to verify your identity before creating your account'. The form contains five input fields: 'Email Address', 'First Name', 'Last Name', 'Date Of Birth', and 'Secret Key'. Each field has a small orange icon to its right. At the bottom of the form is a large orange button labeled 'Verify your identity'.

## Employee User Activation

When the initial Publish process takes place, all employees with a valid email address within **Employee details** will receive a myePayWindow invitation.

**Please Note:** Automatic Invitation is the default setting and invites all employee users, this can be disabled in myePayWindow under **Administration | Details** by deselecting **Enable Automatic Invitation**

The employee has 20 days to complete the registration, if this time limit lapses a new invitation will need to be sent

**Please Note:** Only strong passwords are allowed. These must include at least one capital, one lower case, one number and one special character, and must have between 8 and 20 characters

## User - Optional Security

To enhance your security, 2 forms of optional user security can be used in addition to the username and password configured.

- 2 step authentication (2SA) – this requires a memorable word to be setup. The user is then required to enter 2 random characters from this word each time they log-in to gain access to their account
- 2 factor authentication (2FA) – this requires a smartphone 'Authenticator App'. Each time a user logs in, they will additionally need to enter a code generated by the authenticator app to gain access to their account

The additional authentication can be set up by the individual user under the **My Settings/My Account** pages. Use the drop-down menu to choose either 2SA or 2FA and click **Save**.

If you enforce 2SA for your users, they will be asked to create a memorable word, this can only contain letters and digits and can be between 6 and 12 characters.

**Note: if you enter the incorrect information, after 3 attempts the account will be locked. You need to wait an hour before the user can re-enter the requested characters from the memorable word or contact their Bureau/Employer to unlock the account**

The memorable word can be reset by click on the '**Forgot Memorable Word**' link.

For further information on 2SA and 2FA, please see the **Employer Portal User Guide**.

## Further Guidance

There is a comprehensive guide to the myePayWindow Employer Portal and a myePayWindow Employee Guide, these can be found here:

**MyePayWindow Employer Portal Guide**

**MyePayWindow Employee Guide**

## Useful numbers

| HMRC online service helpdesk  | HMRC employer helpline                                  |
|---|---|
| Tel: 0300 200 3600<br>Fax: 0844 366 7828<br>Email: <a href="mailto:helpdesk@ir-efile.gov.uk">helpdesk@ir-efile.gov.uk</a> | Tel: 0300 200 3200<br>Tel: 0300 200 3211 (new business) |

## Contact Sales (including stationery sales)

| For IRIS Payrolls   | For Earnie Payrolls   | For IRIS Payroll Professional   |
|---|---|---|
| Tel: 0344 815 5656<br>Email: <a href="mailto:sales@iris.co.uk">sales@iris.co.uk</a> | Tel: 0344 815 5676<br>Email: <a href="mailto:earniesales@iris.co.uk">earniesales@iris.co.uk</a> | Tel: 0345 057 3708<br>Email: <a href="mailto:payrollsales@iris.co.uk">payrollsales@iris.co.uk</a> |

## Contact Support

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

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