



Earnie

OpenEnrol and OpenPayslips



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Introduction

Welcome to your guide to setting up and using the IRIS AE Suite™ web portal.



The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your Earnie software), IRIS OpenEnrol and IRIS OpenPayslips/P60s/P45s.

For more details on the IRIS AE Suite™ please contact Farmplan on 01594 545000.

The Guide will describe setting up the cloud portal for the following elements of the IRIS AE Suite™:

- **IRIS OpenEnrol**
- **IRIS OpenPayslips and P60s**

For instructions on setting up your Earnie data to work with Open Enrol please refer to the **Pension Guide** in the program.

What is IRIS OpenEnrol?

IRIS OpenEnrol is an element of the IRIS AE Suite™, and is 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?

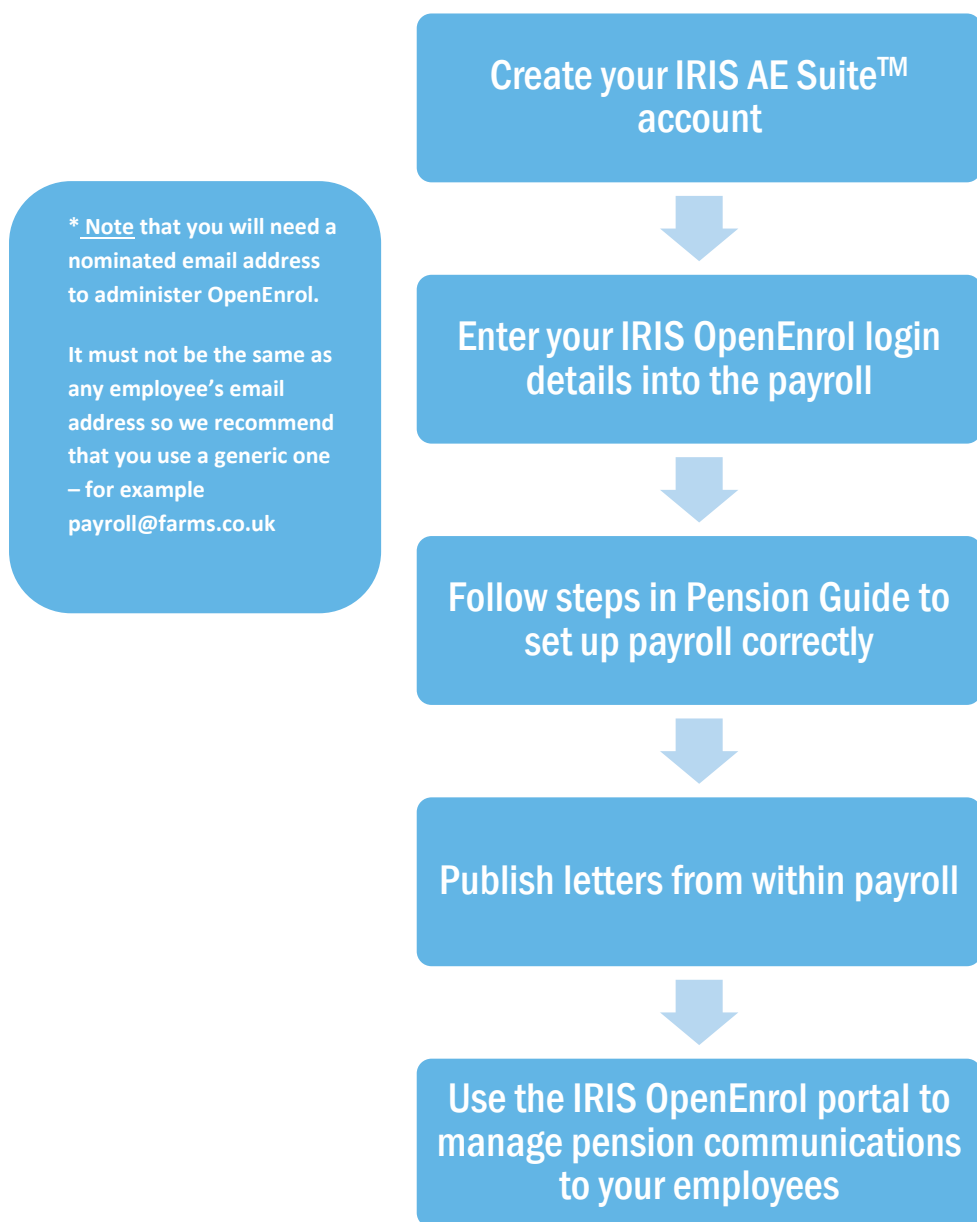
- Employees receive pension communications directly via email
- Letters can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases Automatic Enrolment administration efficiency
- Reduces carbon footprint demonstrating an environmentally 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 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 OpenEnrol secure website. 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 **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 Pensions Regulator (TPR) key requirements
- If the employee does not have an email address, log into **OpenEnrol** to print the required letter to give to them.

Steps to setting up and using IRIS OpenEnrol



How to create an IRIS OpenEnrol account

If you already 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 **OpenEnrol** (contact Farmplan on 01594 545000) you will receive an email confirming your IRIS OpenEnrol account has been created. Click on the link to confirm Terms & Conditions and order details.



SIGN-UP - IRIS OpenEnrol

Dear Test Test,
Thank you for expressing your interest in IRIS OpenEnrol. In order to process your order please follow the link below.

What do you need to do?

- Click on the link below to confirm your Contract and Direct Debit Details:
<https://payslips.irisopenapps.co.uk/Sales/ReviewSalesRegistrationData/?Id=7533&token=bfe4254d-456a-487b-a04f-4f980195dff6>

2. You will then receive an email confirming your account has been created. Click on the link in that message to complete your registration



Activate Your OpenPayslips Account

Dear Tom Hext,
Thank you for signing up to OpenPayslips.
To complete your registration click <https://www.irisopenpayslips.co.uk/account/confirm/163e6b9e-2ff2>.
If you have any questions regarding the product please contact our Support Team who can assist on technical queries via www.iris.co.uk/contactsupport.
As a reminder, please note that your use of OpenPayslips is governed by the terms and conditions you agreed to when you signed up, available here: <https://www.irisopenpayslips.co.uk/Home/TermsAndConditions>.

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



Enter your chosen password

Thank you for registering with IRIS OpenPayslips, please enter your password below

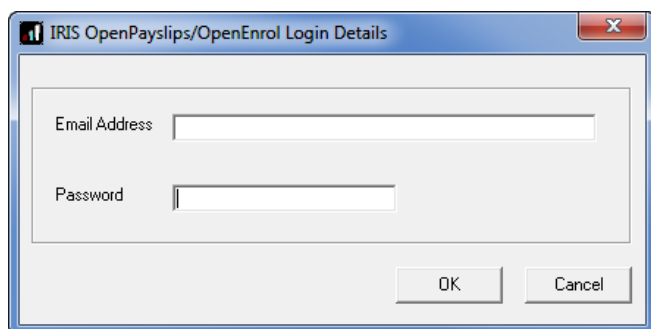
Email address	<input type="text" value="quarriesoffice@yahoo.co.uk"/>
First Name	<input type="text" value="Tom"/>
Last Name	<input type="text" value="Hext"/>
New password	<input type="password"/>
Confirm new password	<input type="password"/>
<input type="button" value="Set Password"/> <input type="button" value="Cancel"/>	

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

How to set up OpenEnrol in the payroll software

The new **Administrator - Email Address** needs to be added to the payroll software. All employees must have a valid email address.

1. Log into **Admin**, click on **File | Online Login Details | IRIS OpenPayslips/OpenEnrol**
2. Enter the email address and password previously registered against your **OpenEnrol** account and click OK



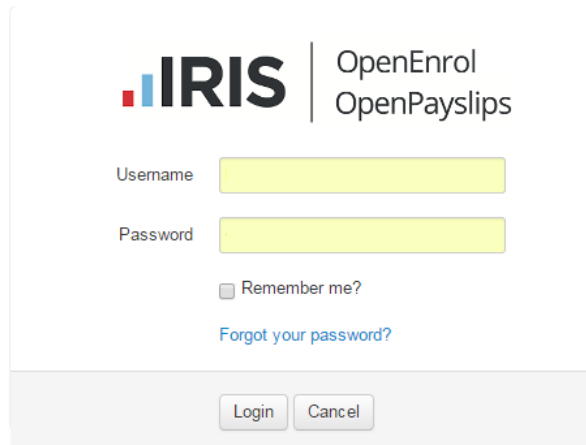
3. Log back into the Earnie payroll software. Each company will normally use these default OpenEnrol login details. However, if you wish to keep each company separate, you can set different login details for each company in **Company | Alter Company Details | Open IDs**
4. All employees must have a valid email address in order to receive electronic communications. This is entered in their **Employee Details**. (If they do not have an email address you will be able to print their communications for them.)

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

Administer employee pension communications using IRIS OpenEnrol

- Go to the IRIS OpenEnrol website at <https://www.irisopenpayslips.co.uk/> and click the **Login** button

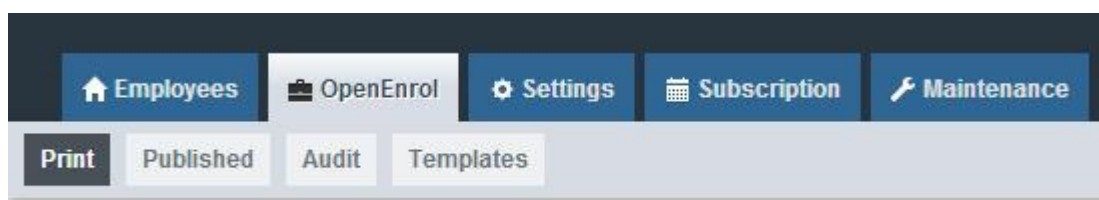
The image shows the login page for IRIS OpenEnrol. At the top, there is the IRIS logo (a red square followed by the word 'IRIS' in bold) and the text 'OpenEnrol OpenPayslips'. Below this, there are two input fields: 'Username' and 'Password', both with yellow backgrounds. Under the password field, there is a checkbox labeled 'Remember me?' and a blue link that says 'Forgot your password?'. At the bottom of the form, there are two buttons: 'Login' and 'Cancel'.

- Enter the login details you entered when you created the IRIS OpenEnrol account. The Username is the email address you used when you registered. Click the **Login** button

NOTE: To receive a password reminder click the '**Forgot your password?**' link.

The first screen you see on logging in is the **Employees** tab. This is a summary of what has happened recently within the company.

- 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

Search

Select All

Print

Enlarge

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	7	ioog cfdiylksd	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

IRIS

OpenEnrol

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 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 the **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 see what communications have been sent. To do this:

- Click the **Published** button to open the **Published** view

The screenshot shows the 'Communications Published' interface. At the top, there's a header with the title 'Communications Published' on the left, a 'Company Filter' dropdown set to 'All' in the center, and an 'Employee Search' input field with a 'Q Search' button on the right. Below the header, there's a table of communications. Above the table, there are controls: a 'Select All' checkbox, a 'Resend' button, and an 'Enlarge' button. The table has columns for 'Select', 'Employee Code', 'Employee', 'NI Number', 'Document', 'Company Name', and 'Date'. It lists five entries for different employees and their pension-related letters.

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

At the bottom left, the 'IRIS' logo and 'OpenEnrol' text are visible.

You are able to view a list of all the emailed communications, as well as resend the emails if necessary, from this screen.

- Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals
- Click the **Select All** box, or tick the boxes to select particular letters. Click the **Resend** button to resend the emails previously sent through the payroll software.

Audit

Audit

From
dd/mm/yyyy

To
dd/mm/yyyy

Document
All


Company Filter
All

Employee Search

Q Search

Quick Report

Employee Code	Employee	Date	NI Number	Document	Version	Template	Company Name	Printed/Emailed
7	ioog cfidiylkld	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

 OpenEnrol

The **Audit** section is primarily so you can provide evidence to the Pensions Regulator that you are meeting your legal obligations regarding pension communications.

- Use the filters **From**, **To**, **Document**, **Company Filter** and **Employee Search** to narrow the list of entries as required
- 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

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. **NB** - if you require different logos/signatures for each company you should set each company up with its own login details.

- Click on the **Templates** button to open the **Templates** view
- In the **View** column, click on the **View Template** link next to the template you are interested in

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

- 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.

To add your logo to the template:

Click the **Edit Logo** button



Edit Template

Upload New Logo: [Browse...](#)

Upload New Signature: [Browse...](#)

[Close](#) [Save Changes](#)

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

- Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**
- 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/P45s 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/P45s 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/P45s on tablets or smartphones

Steps to setting up and using IRIS OpenPayslips

Visit IRIS OpenPayslips website and Create Account



Update payroll software with Account details



Check employee email addresses



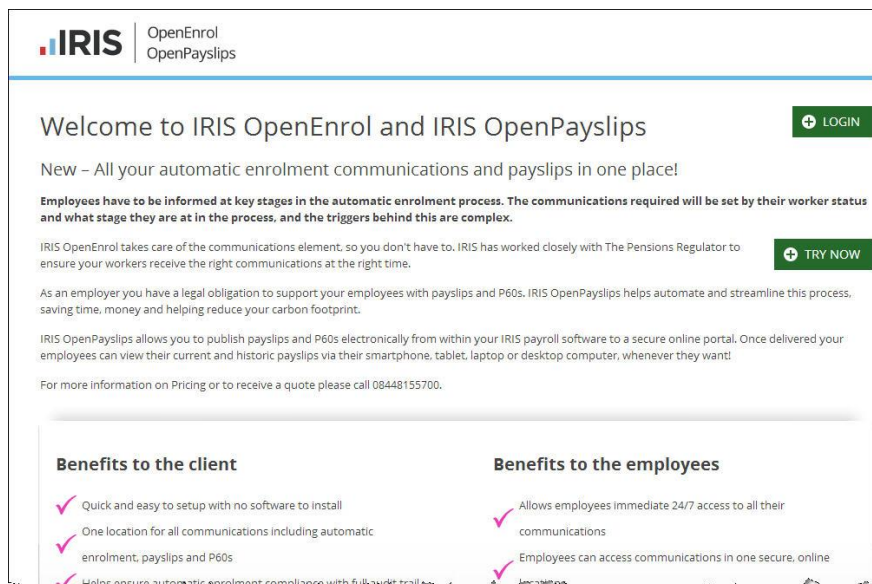
Publish payslips and/or P60s/P45s

* Note that you will need a nominated email address to administer OpenPayslips.

It must not be the same as any employee's email address so we recommend that you use a generic one – for example payroll@farms.co.uk

How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website [here](#). If you have not already registered for **OpenEnrol** you will need to create an account.



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

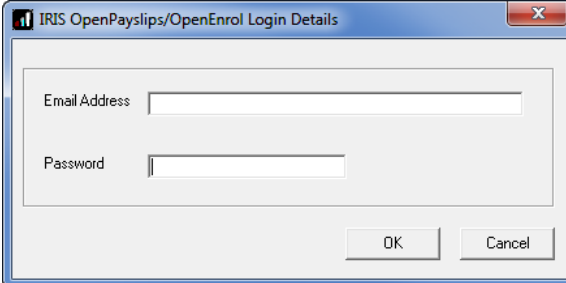
The screenshot shows the 'Create a new account' form. The header includes the IRIS logo and 'OpenEnrol OpenPayslips'. The main heading is 'Create a new account'. Below this, there are two paragraphs of instructions. The form is divided into two main sections: 'New Organisation Details' and 'New Administrator'. The 'New Organisation Details' section includes fields for Organisation Name, Customer Reference, Address, Town, Postcode, Country, Telephone, Contact Email Address, and Web Address. The 'New Administrator' section includes fields for Email Address, Confirm Email Address, Forename, and Surname. There are checkboxes for 'I am an Accountant/Bureau' and 'I have read and agree to the Terms and Conditions'. At the bottom right, there are 'Create' and 'Cancel' buttons.

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

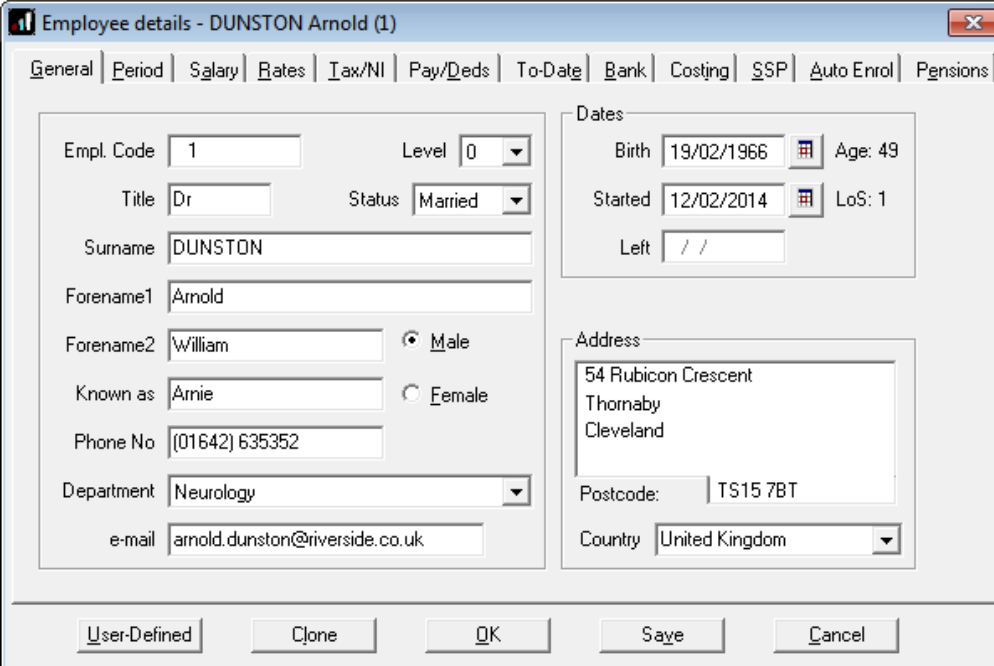
The new **Administrator - Email Address** needs to be added to the payroll software and all employees must have valid email addresses.

1. Log into **Admin**, click on **File | Online Login Details | OpenEnrol/OpenPayslips**
2. Enter the email address and password registered on the IRIS OpenPayslips website and click OK



A screenshot of a Windows-style dialog box titled "IRIS OpenPayslips/OpenEnrol Login Details". It contains two text input fields: "Email Address" and "Password". Below the fields are two buttons: "OK" and "Cancel".

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



A screenshot of a "Employee details - DUNSTON Arnold (1)" form. The form has a tabbed interface with tabs for General, Period, Salary, Rates, Tax/NI, Pay/Deds, To-Date, Bank, Costing, SSP, Auto Enrol, and Pensions. The "General" tab is active. The form contains various fields for employee information:

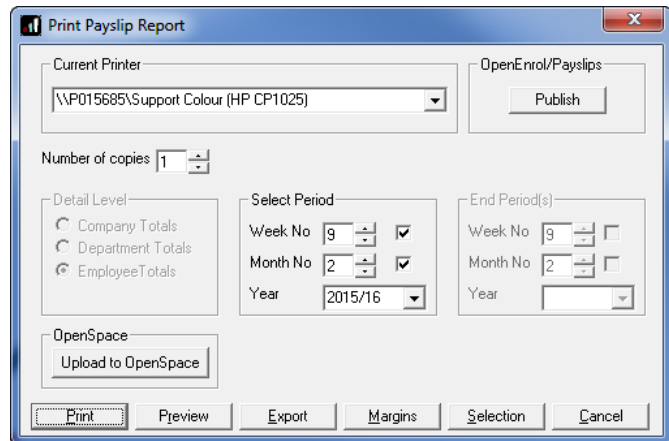
- Empl. Code: 1, Level: 0 (dropdown)
- Title: Dr, Status: Married (dropdown)
- Surname: DUNSTON
- Forename1: Arnold
- Forename2: William, Gender: Male (radio buttons)
- Known as: Arnie, Gender: Female (radio buttons)
- Phone No: (01642) 635352
- Department: Neurology (dropdown)
- e-mail: arnold.dunston@riverside.co.uk
- Dates: Birth: 19/02/1966, Age: 49, Started: 12/02/2014, LoS: 1, Left: / /
- Address: 54 Rubicon Crescent, Thornaby, Cleveland, Postcode: TS15 7BT, Country: United Kingdom (dropdown)

At the bottom of the form are buttons for "User-Defined", "Clone", "OK", "Save", and "Cancel".

To publish payslips/P60s/P45s to OpenPayslips portal

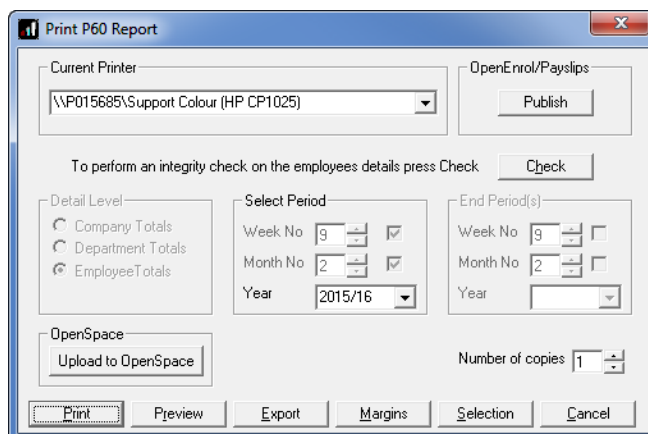
Payslips

1. Go to **Reports | Print Payslips** and select the required pay periods
2. Click the OpenEnrol/Payslips **Publish** button in the top right of the **Print Payslip Report** screen
3. If some employees do not have an email address, a message will appear asking if you wish to print payslips for those individuals
4. Select **Yes** or **No**
5. 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 **Reports | Library Selection | Miscellaneous**, and select P60 (OpenPayslips) (this only needs to be done once)
2. Select **Reports | Year-end Forms**
3. Select the **P60 (OpenPayslips)**
4. Click the **Publish** button at the top of the screen



5. All current employees with an email address who have been paid in the tax year will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their P60.

P45s

1. From **Reports | Library Selection | Miscellaneous**, and select **P45 (OpenPayslips)** (this only needs to be done once)
2. Go to **Employee | P45 Routines | Issue P45**
3. Choose the employee and click OK
4. Enter the Leaving Date and click Print
5. Select **P45 (OpenPayslips)**
6. Click the **Publish** button at the top of the screen

Print P45 Report

Current Printer: Hewlett-Packard HP LaserJet P2035

OpenEnrol/Payslips: Publish

Detail Level:
☐ Company Totals
☐ Department Totals
☒ Employee Totals

Select Period:
Week No: 1
Month No: 4
Year: 2017/18

End Period(s):
Week No: 1
Month No: 4
Year:

OpenSpace:
Upload to OpenSpace

Number of copies: 1

Print Preview Export Margins Selection Cancel

7. 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:-

1. Go to the IRIS OpenPayslips website at <https://www.irisopenpayslips.co.uk/> and log in with your 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 and the screen changes again to show the payslips/P60s 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 OpenEnrol & 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 displays the IRIS OpenPayslips web application interface. At the top, there is a navigation bar with tabs: Employees, OpenEnrol, Settings, Subscription, and Maintenance. The 'Employees' tab is active. Below the navigation bar, there is a section titled 'Your Employees' with a search bar and a table of employees. The table has columns for Employee Name, Company Name, Status, Last Login, and Password. The employees listed are Arnold Dunston, Beatrice HYDE, David Murray, and Graham Patterson. To the right of the employees table, there is a 'Payslips' section with a 'Download' button and a table of payslips. The payslips table has columns for Description, Full Name, Year, and Up. The payslips listed are Auto Enrolment Is Coming, P60 2014-2015, L0 - Auto Enrolment Is Coming, Payslip M 02 2013-2014, Payslip M 01 2013-2014, and Payslip M 01 2013-2014. The interface also includes a 'HELP & SUPPORT' button on the right side.

Employee Name	Company Name	Status	Last Login	Password
Arnold Dunston	IRIS Software Ltd	Inactive	23/05/2014 16:28:37	Re-send
Beatrice HYDE	Riverside Hospital PLC	Active	02/05/2014 11:30:10	
David Murray	Riverside Hospital PLC	Registration sent	16/08/2013 14:49:49	Re-send
David Murray	Riverside Hospital PLC	Registration sent		Re-send
David Murray	Eaton Limited	Registration sent		Re-send
Graham Patterson	Riverside Hospital PLC	Registration sent		Re-send

Description	Full Name	Year	Up
Auto Enrolment Is Coming	Arnold Dunston	2014	20/16
P60 2014-2015	Arnold Dunston	2014	28/11
L0 - Auto Enrolment Is Coming	Arnold Dunston	2014	31/17
Payslip M 02 2013-2014	Arnold Dunston	2013	12/14
Payslip M 01 2013-2014	Arnold Dunston	2013	22/10
Payslip M 01 2013-2014	Arnold Dunston	2013	22/10

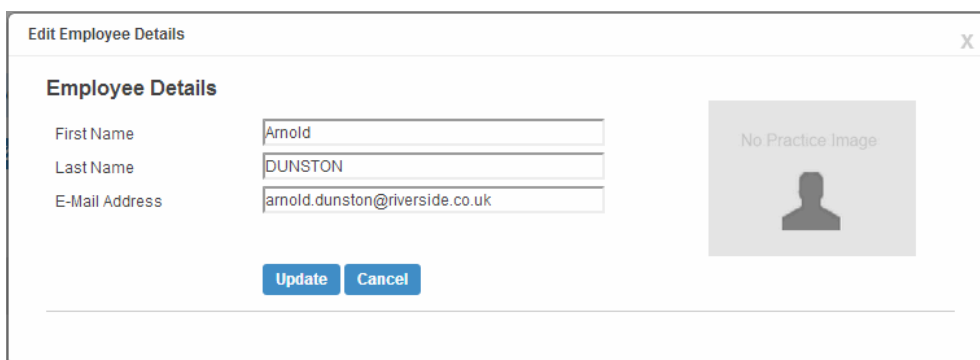
Employees

The **Employees** tab displays all employees from all companies in the payroll software that have had payslips 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 radio buttons on the left, then click **Edit Employee**



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

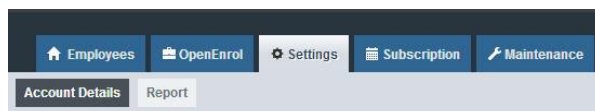
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s/P45s

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
 - Select **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**
 - Select **Changed Employee Emails** to view previous email addresses and what they have changed to

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:

- Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
- 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 their email, it will not work.



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