.IRIS

IRIS Payroll

HR Integration Guide

November 2020

IRIS. Look forward

Contents

Welcome

This guide will give you an overview of how HR Integration works within the payroll software. You can read it straight through or just jump to the section you are interested in, using the links on the **Contents** page.

If text within the guide looks like **this** it is a link, which will take you to information on that topic.
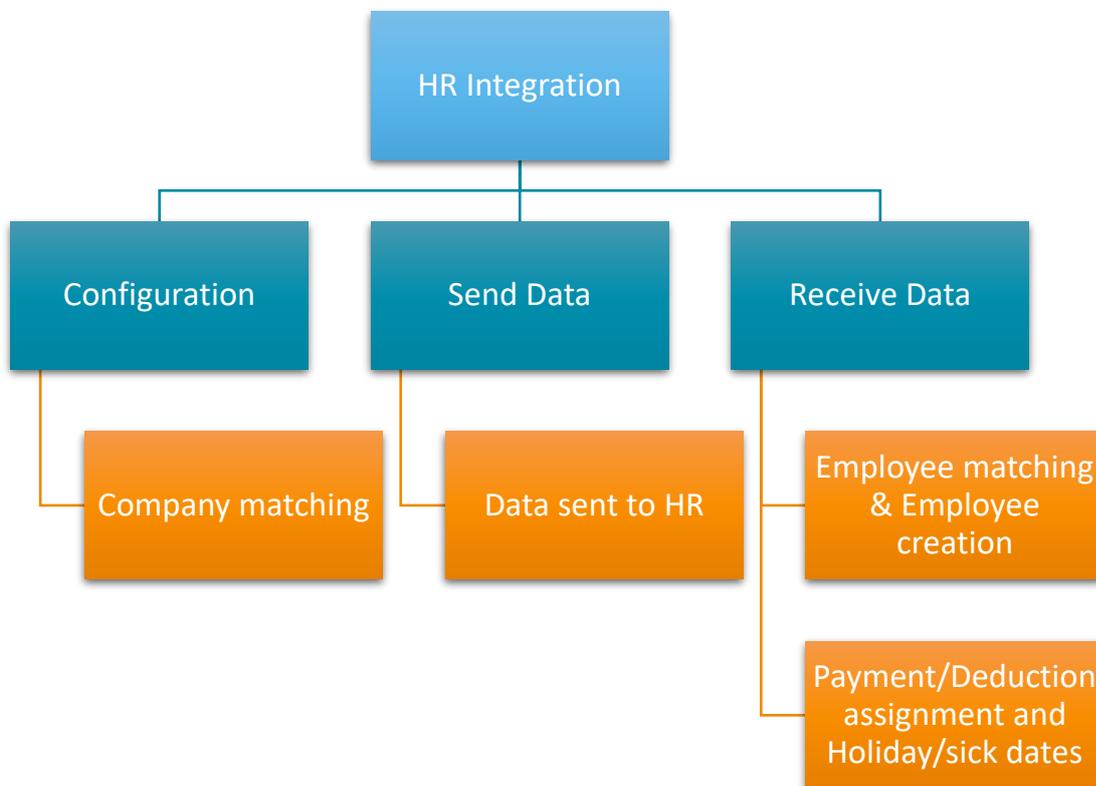
Introduction

HR Integration is a revolutionary feature of the software, created to help reduce your workload and free up your valuable time.

With an active HR account, you can send data to payroll and import from payroll into HR. Information entered into your HR system can be pulled through to payroll and used to pay employees. This time-saving feature removes the need to enter the same information twice, or to use cumbersome export and import processes.

If you have the IRIS AE Suite, you can publish payslips, pension letters and P60s to HR where your employees can view them. A guide advising employees how to view these can be found **here**

Here is an overview of the process:

```
                        ┌──────────────────┐
                        │  HR Integration  │
                        └──────────────────┘
        ┌───────────────────────┼───────────────────────┐
┌───────────────┐      ┌───────────────┐      ┌───────────────┐
│ Configuration │      │   Send Data   │      │  Receive Data │
└───────────────┘      └───────────────┘      └───────────────┘
        │                      │                      │
┌───────────────┐      ┌───────────────┐      ┌──────────────────────┐
│   Company     │      │  Data sent    │      │  Employee matching   │
│   matching    │      │   to HR       │      │  & Employee          │
└───────────────┘      └───────────────┘      │  creation            │
                                              └──────────────────────┘
                                              ┌──────────────────────┐
                                              │ Payment/Deduction    │
                                              │ assignment and       │
                                              │ Holiday/sick dates   │
                                              └──────────────────────┘
```

HR Integration

In your Payroll software, on the **Company** tab card there is an **HR Integration** section which includes the following options: **Configure**; **Send to HR**; **Get from HR**, **View & Import HR Data** and **View Links**.
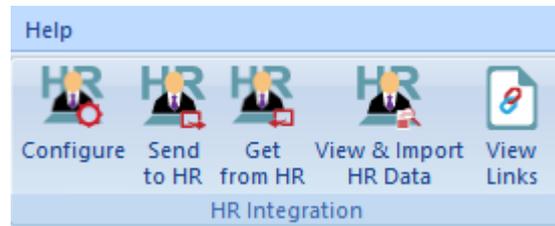
Configuration

> **Please Note**: Before configuring HR Integration in payroll, you **<u>must</u>** have a company in HR for the payroll company to link to. You must also check that each payment/deduction name in payroll is unique, before sending data to HR.

To create a new company in HR

As stated above, you must have a company in HR for your payroll company to link to. To create a company in HR:

1. Log into HR

2. Choose **System Tools**

3. Then, from the top right, select **Lookup Tables**

4. From the **Lookup Tables** screen click **Contract**

5. This opens a drop-down list, choose **Company**

6. From the **Company** screen, select **Create New**

7. Leave **Type** set to **Company**

8. In the **Lookup** field enter your **Company Name**

9. Click **Save** then **Close**
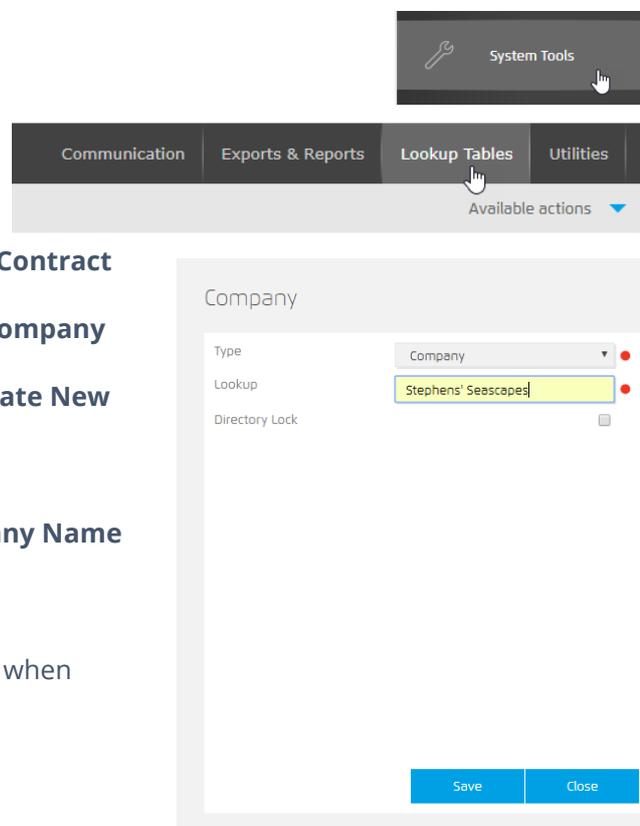
This company will now be available to select when linking payroll to HR.

How to configure HR Integration in Payroll

You **must** complete the configuration process **before** using HR Integration for the first time. To do this follow these steps:

Login Details

1. Go to **Company | Configure**

2. This will open the **HR Integration Configuration** screen

3. Enter the **Username** and **Password** – these are your HR login credentials

4. Tick **Show Password** if you want to confirm what you have entered

5. Click **OK**

6. If you only have one company in HR, the company will automatically link

7. If you have more than one HR company, the **HR Integration Company Selection** screen will be displayed

     i. From the drop-down list, select the HR company to link to payroll

     ii. Choose the **HR Name (ID)** from the list

     iii. Click **OK**
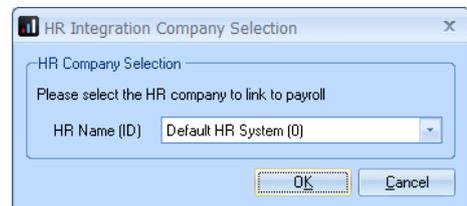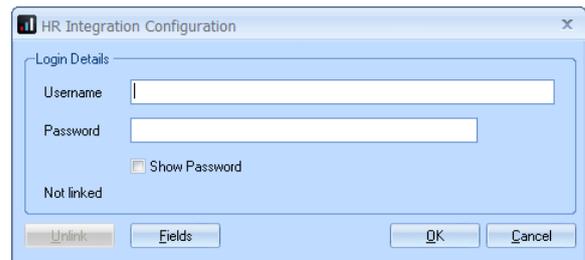
> Each HR Company only links to a single payroll company. Once you have linked a company in payroll to a company in HR you are unable to link that HR company to a different payroll company. HR has a mandatory company field when set to link to payroll.

> **Please Note**: If the **Tax Code** field and **Student Loan details** are blank in payroll, for instance it is a new employee, the applicable fields will be imported into **Employee Details**

8. On the **HR Integration Configuration** screen, click the **Fields** button. This opens the **HR Integration Settings** screen

9. The **HR to Payroll** and **Payroll to HR** columns allow you to customize the direction the information is transmitted, for instance send from Payroll to HR or import from HR into payroll. The fields available for selection are:

    ▪ **Employee Details** (both HR to Payroll and Payroll to HR selected by default)
    ▪ **Tax/NI Details** (Only Payroll to HR selected by default)
    ▪ **P45/New Starter Details** (Only Payroll to HR selected by default)
    ▪ **Student Loan Details** (Only Payroll to HR selected by default)
    ▪ **Bank Details** (Only HR to Payroll selected by default)
    ▪ **Absences** (Only HR to Payroll selected by default)
    ▪ **Pensions** (Only Payroll to HR selected by default)
    ▪ **Pay Information** (Only Payroll to HR selected by default)

Field Groups

For your information, the following table details the field groups.

Employee Details		
Title	Marital Status	Surname
Forename 1	Forename 2	Known as
Tel No	e-mail	Dates – Birth
Address	Postcode	Country
Gender	Dates – Started	Department
Passport No	Pay Method	

Tax/NI Details		
Tax Code	Week1/Month 1?	NI Number
NI Rate	Director?	Director Tax Week Number
Normal NI	Apprenticeship End Date	Off-Payroll Worker
Worker Pays ER's NI		

P45/New Starter Details

Previous Employment – Gross Pay	Previous Employment - Tax Paid	Starter Details

Student Loan

Student Loan Start Date	Student Loan End Date	Continue Student Loan
Plan Type	Postgraduate Student Loan Start Date	Postgraduate Student Loan End Date
Continue Postgraduate Student Loan		

Bank Details

Sort Code	Account No	Bank/Building Soc Name
Bank Branch	Account Name	Building Society Roll Number
Bank Reference 1 (Bobs/Autopay)		

Absences

Absence Reason (Sick/Holiday)	Date of absence	Holiday Pay | Entitlement

Pensions

Pay Elements flagged as Pension	Pension Fund* (Payroll to HR only)	

Pay Details

Pay Rate in period assigned to employee	Hours in period assigned to employee	Pay/Deds assigned to employee that are not flagged as pension

Send to HR

You must run the **Send to HR | HR Integration | Payroll Information** option for <u>all</u> companies <u>before</u> you can get data from HR. *

You can also use the **Send to HR | HR Integration | Payroll Information** option to export <u>static data</u> to HR, such as company pay element data (e.g. hourly rates and payments & deductions), employee details and pay elements (such as bonus payments and expenses) assigned to employees. This includes pension pay elements listed in **Company | Payments & Deductions | Configure Pensions**. If an employee has a pension assigned, the standard value will also be sent from payroll to HR. If pension deductions are not assigned to a Pension Fund, these will not be sent to HR.

If you have a salary sacrifice pension, you need to set the Salary Sacrifice flag in IRIS HR manually. To do this:

1. Log into IRIS HR

2. From **Directories** select the employee

3. On the **Benefits** tab, select the relevant pension and tick the **Salary Sacrifice** box

4. Click **Save**

> **Please Note**: You **must** check that each payment/deduction name in payroll is <u>unique</u>, before sending data to HR.

> **Please Note**: If multiple employees' or employers' deductions are linked to a Pension Fund, these will need to be checked in HR to ensure the correct elements are linked for employees.

* Unless you have been using both HR and payroll prior to integration being added to the software

> **Please Note**: Do not delete rates or payments that have been used from either system for an employee. This may cause inaccuracies with reports on both HR and Payroll systems. Removal of rates/payments for employees should only be performed if a rate/payment has not been used in the current tax year (i.e. after a year end restart)

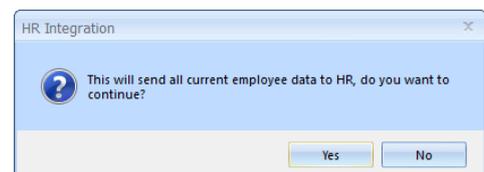This section shows the steps you need to take if:

- **If you are new to both payroll and HR**
- **If you have an existing company in payroll but you are new to HR**
- **If you have an existing company in HR but you are new to payroll**
- **If you have both payroll and HR with an existing company and employees**

If you are new to both payroll and HR
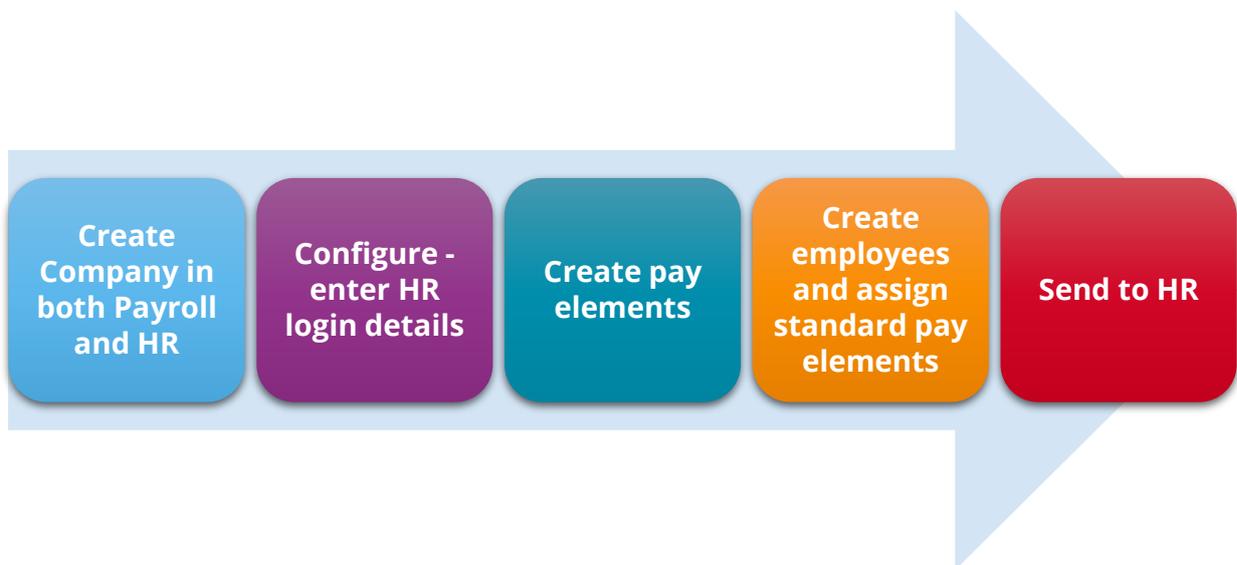
Once you have set up the company in payroll (for help, click **here** to view the **IRIS Payroll Getting Started Guide**) and HR:

1. Log into payroll

2. In payroll go to **Company | Configure** and enter your **HR login details**

3. Under **Company | Pay Elements**, create hourly rates, and payments and deductions

4. Create your employees and assign any standard pay elements

5. From the **Company | HR Integration** section choose **Send to HR | HR Integration | Payroll Information**

6. A message will be displayed, click **Yes** to continue

7. Once complete, a message confirming data has been successfully sent to HR will be displayed

This process will:

- Send and create the pay elements definitions in HR
- Create the employees in HR, together with the standard pay elements assigned in payroll

If you have an existing company in payroll but you are new to HR

If you have a company in payroll but have just purchased HR, once you have created a company in HR:

1. Log into payroll

2. Go to **Company | Configure** and enter your **HR login details**

3. From the **Company | HR Integration** section, choose **Send to HR | HR Integration | Payroll Information**

4. A message will be displayed, click **Yes** to continue

5. Once complete, a message confirming data has been successfully sent to HR will be displayed
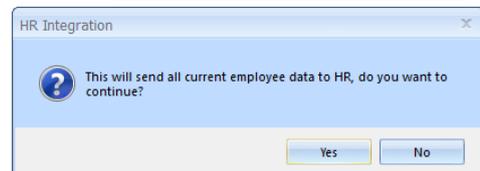
This process will:

- Send and create the pay elements definitions in HR
- Create the employees in HR, together with the standard pay elements assigned in payroll

If you have an existing company in HR but you are new to payroll

| Create company in payroll | Configure - enter HR login details in payroll | Create pay elements in payroll | Send to HR |
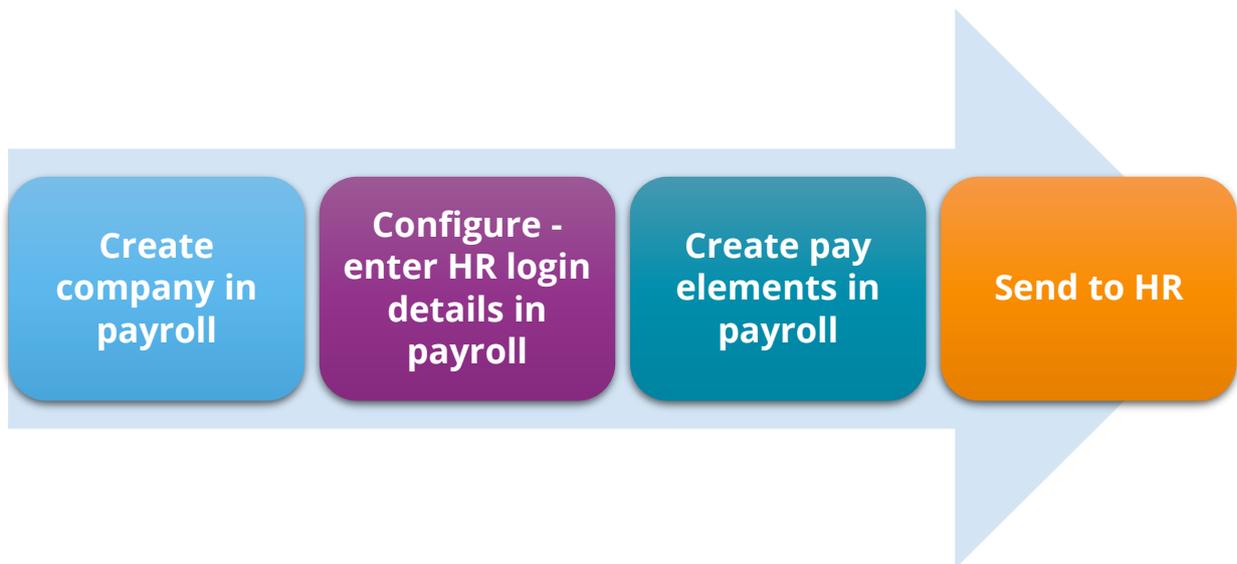
If you are creating a new company, having purchased the payroll software, once you have set up the company in payroll (for help, click **here** to view the **IRIS Payroll Getting Started Guide**):

1. In payroll go to **Company | Configure** and enter your **HR login details**

2. Under **Company | Pay Elements**, create hourly rates and payments and deductions

3. From the **Company | HR Integration** section choose **Send to HR | HR Integration | Payroll Information**

4. A message will be displayed, click **Yes** to continue

5. Once complete, a message confirming data has been successfully sent to HR will be displayed

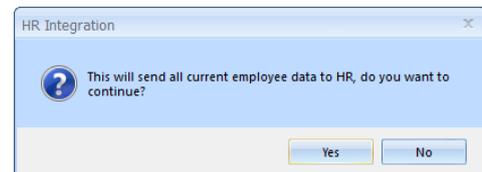6. In HR, ensure employees have the **Pay Type** field set

This process will:

- Send and create the pay elements definitions in HR

> **Please Note**: After performing the **Get from HR** process you need to assign any standard pay elements to employees in payroll

If you have both payroll and HR with an existing company and employees

If you have existing companies in payroll and HR and want to link the products:

1. Ensure all data in IRIS HR is up to date

2. Prior to running payroll, make a backup of your payroll data, ensuring the last payroll period run for the frequency has been finalised

3. In HR, select an employee and go to **Employee | Contract | Company**. Then select the relevant company for the employee. Next go to **Employee | Payroll | Pay Type** and choose the appropriate pay frequency

    For help with creating and assigning a **Pay Type**, see **creating a Pay Type** and **assigning a Pay Type**

4. Repeat step 3 for all employees in the HR system

5. Log into payroll and in **Company | Configure** enter your **Username** and **Password**, see **HR login details**

6. If there are multiple frequencies configured, select the frequency to link to HR in payroll

7. Go to **Company | Get from HR** and get the data from HR for the active period for the frequency

8. After performing **Get from HR**, the retrieved data is listed on the **Company | View & Import HR Data** screen

9. Highlight the **Period** and click **Validate**

10. Ignore any "**Error – Pay/Ded does not exist**" messages, however if other validation errors/warnings appear, amend these in HR and repeat step 7

11. When you are happy with the data from HR, go to **Company | Get from HR** and select **Get Data** for the active period with the **Final Request** option selected

12. Go to **Company | View & Import HR Data**, highlight the period you have just closed and click **Import**, ignoring any "**Error – Pay/Ded does not exist**" messages
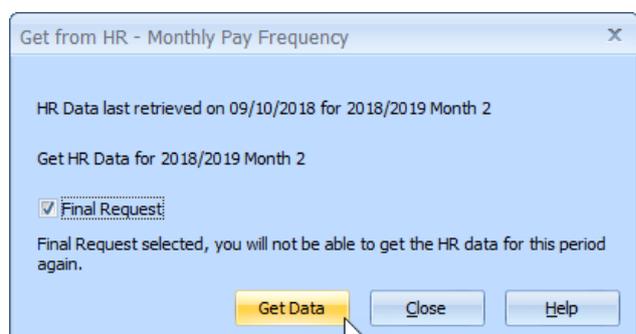
    This will copy over and import all the employee details from HR into payroll

13. Repeat steps 3-10 for all pay frequencies in use

14. Remove any duplicated holidays or holidays that have already been paid

15. Run payroll for the selected frequency and period

16. From the **Company | HR Integration** section, choose **Send to HR | HR Integration | Payroll Information** to send data to HR for the period

17. A message will be displayed, click **Yes** to continue

18. Once complete, a message confirming data has been successfully sent to HR will be displayed

    This will set up the pay elements in HR and assign them to employees

19. Finalise the period after all payroll processes are completed

20. Continue to use HR integration in the normal manner

Current pay period is week 4 for a weekly payroll with a pay date of 28/04/2019	→	Update all HR data	→	Back-up payroll data

Validate HR data for week 4	←	Get from HR (non final) for week 4	←	Finalise week 3 in payroll

Get from HR (Final) for week 4	→	Import data for week 4	→	Remove any duplicated holidays

Use HR Integration as normal	←	Finalise period	←	Send to HR (to set up pay elements)

Using HR Integration in Payroll

Get From HR

Once you have performed the initial **Send to HR**, the payroll software will be able to retrieve and import data from the HR system.

The **Get from HR** icon will be enabled once HR Integration has been configured and the payroll company linked to a HR company.

At the top of the **Get from HR** screen the date HR data was last retrieved is displayed. The year, pay frequency and period number are also shown.

> When employees have been sent to HR but not matched to a HR employee in payroll, if you use the **Send to HR** process again, these individuals will not be included until they have been **matched**.
>
> A **Get from HR** needs to be performed, to match employees, before any amendments can be sent for unmatched employees.

To get data from HR:

If you have more than one **Pay Frequency**, select the **Pay Frequency** from the sidebar

1. Click **Company | Get from HR**

2. If you want to view the HR data but not import into payroll at this point, leave **Final Request** <u>unticked</u>. (If you are happy with the data and are ready to import it into payroll tick **Final Request**)

3. Click **Get Data**

4. We recommend that you validate the data before import. See **View & Import Data**
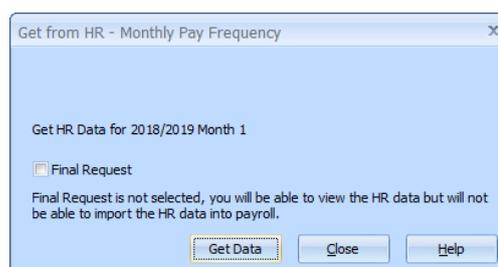
> **Please Note:** Once data has been retrieved from HR and marked as **Final Request**, you cannot retrieve this period again

> **Please Note**: Any new pay elements must be created in payroll and the **Send to HR** process carried out before using the **Get Data** function

View & Import Data

After performing the **Get from HR** function, the retrieved data is listed on the **Company | View & Import HR Data | View/Import from HR** screen. This screen shows:

- **Date Downloaded**
- **Pay Frequency**
- **Period**
- **Status**
- **Import Date**
- **Import User**

If you choose to **Get from HR** without ticking **Final Request** the text in the fields will be red.

The **Import** button is only enabled when **Final Request** has been selected.

Validate

Prior to importing the data received from HR we recommend you **Validate** the data. The **Status** column will show '**not validated**' if:

- HR data has been retrieved without selecting **Final Request**, and
- HR data has not been validated

To validate the data:

1. From the **View/Import from HR** screen click **Validate**

   If the data is validated with no errors found, the **HR Data successfully validated** message is displayed and the **Status** column shows **Validated**.

   If there are errors, a screen is displayed detailing the employee and the errors

2. Click **Print** to obtain a report detailing the errors, this could assist you when resolving the errors in HR

3. Click **Close** from this screen

4. A prompt will be displayed advising you to make the required amendments and to perform the **Get from HR** process again. Alternatively, you can mark the HR data as valid and then **Get from HR** again with the **Final Request** option ticked. You may then need to address the validation errors once you have imported to stop errors re-appearing

5. To mark the HR Data as valid, click **Yes**. Alternatively click **No** to return to the **View/Import** grid.

6. You can automatically import data from HR to Payroll when it is marked as validated. If you select **Company | HR Integration | View & Import Data | Validate** when the data has already been validated, or if you select to mark the data as valid, this will display a prompt asking if you want to import the HR data to payroll now. Click **Yes** to proceed with the import process. If you select **No** to this prompt, you will need to **Get from HR** and tick the **Final Request** box, prior to importing the data

> If you attempt to **Get from HR**, with **Final Request** selected, and have not validated the data, a warning message will be displayed advising you to **Validate** prior to importing into payroll. We would strongly recommend that you carry out the **Validate** process prior to importing however, you can click **Yes** on this message to proceed with the **Get from HR** with **Final Request** set.

To view the data received from HR:

1. Go to **Company | View & Import HR Data**

2. On the **View/Import from HR** screen, highlight the period in the grid and click **View**

   The data is read-only; you can view the following tabs:

   - **Bulk Employee Amendments** – information here will change the standard amounts, such as salary, that appear each payroll for an employee
   - **Amend Existing Employees** – this section displays a card for each employee on the payroll, containing his or her Name, Code and Department
   - **Payroll Entry** – this screen details payroll variations entered to appear for this pay period only

3. Click **Close** to return to the **View/Import from HR** screen

## To get data from HR with Final Request selected:

Once you have validated the data received from HR and are ready to import:

1. If you have more than one **Pay Frequency**, select the **Pay Frequency** from the sidebar

2. Go to **Company | Get from HR**

3. Tick **Final Request**

4. Click **Get Data** – a message displays advising that you will <u>not</u> be able to get the selected period's data from HR again

5. Select **Yes** to continue (**No** will return you to the **Get from HR** screen)
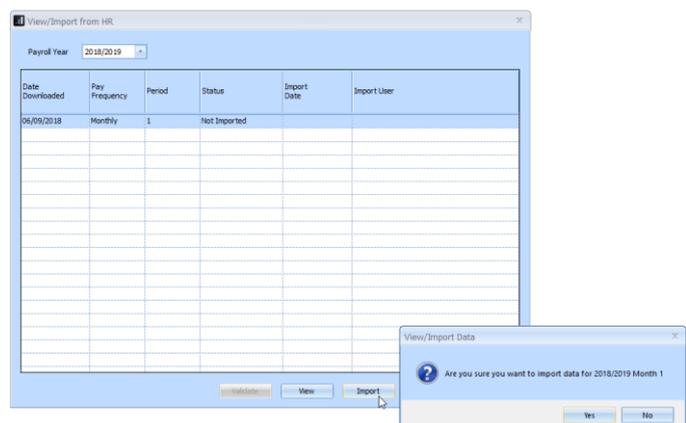
6. If successful, a confirmation message displays
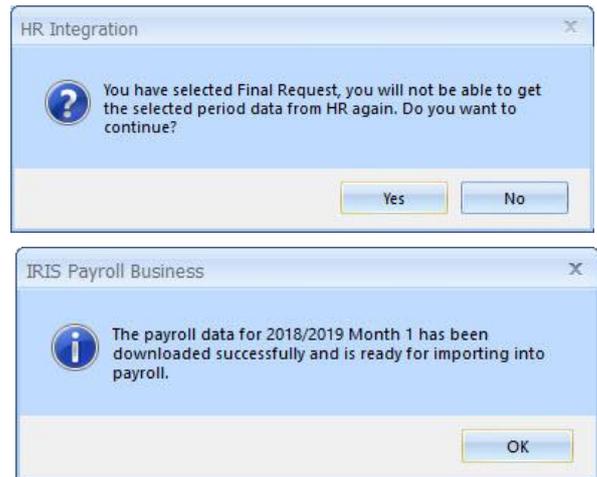
Importing the Data
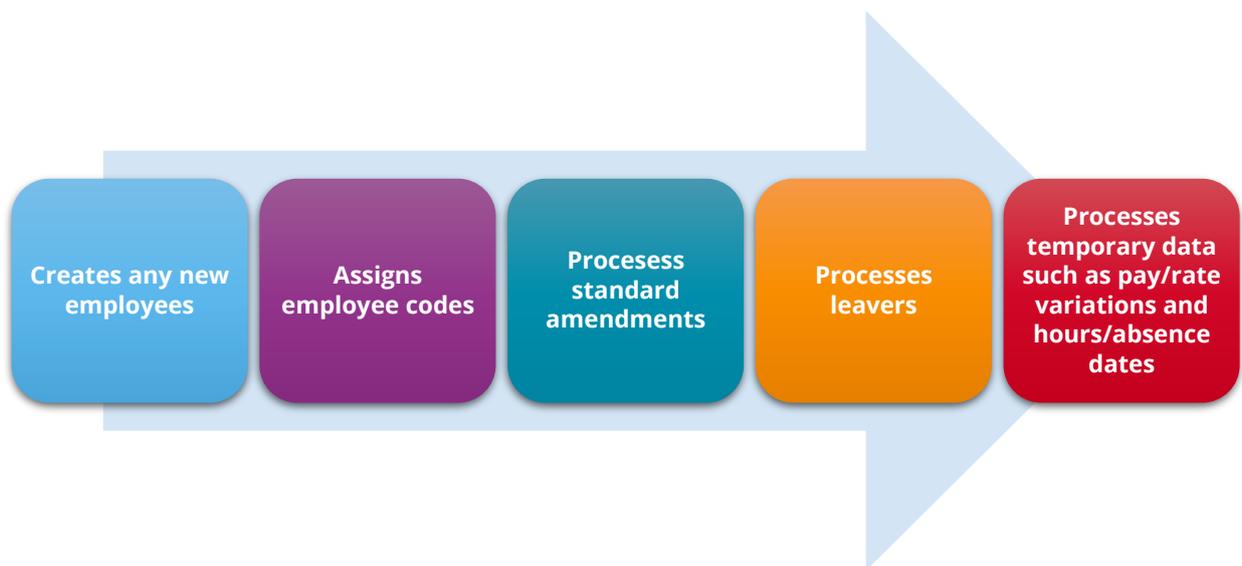
When you are ready to import the data:

1. Go to **Company | View & Import HR Data**

2. Highlight the period in the grid and click **Import**

3. Click **Yes** to the message asking if you are sure you want to import

Please Note: A warning will be displayed if you attempt to import data for an employee who has already had the period calculated. If you click **Yes** to continue importing the data, you will need to calculate the payroll again for the individual. If there are any changes that are not temporary, you will need to undo the payroll for the employee and then calculate again.

After data has been imported, if there are any errors or warnings, such as a missing NI number, they will be displayed.

Employee Matching

When an employee is selected to be matched during the HR Integration import, if there is a mismatch between the Surname and/or the employee NI Number a warning is displayed. Employee matching is usually for new employees, where different employee codes (numbers) may have been used in payroll and HR.

If a HR Employee's NI number does not match the Payroll Employee's NI number, a warning is displayed. Clicking **Yes** on the warning will continue with the employee matching and import process whereas clicking **No** will return you to the employee matching screen.

Payroll will attempt to match employees and will display suggested matches, however, if there is no proposed match between the **HR Employee Name** and the **Payroll Employee Name**, choose the relevant employee from the drop-down list to link with the **HR Employee Name**. If the employee is a new employee, choose the option **-New Employee-**. The drop-down list will not include already linked employees.
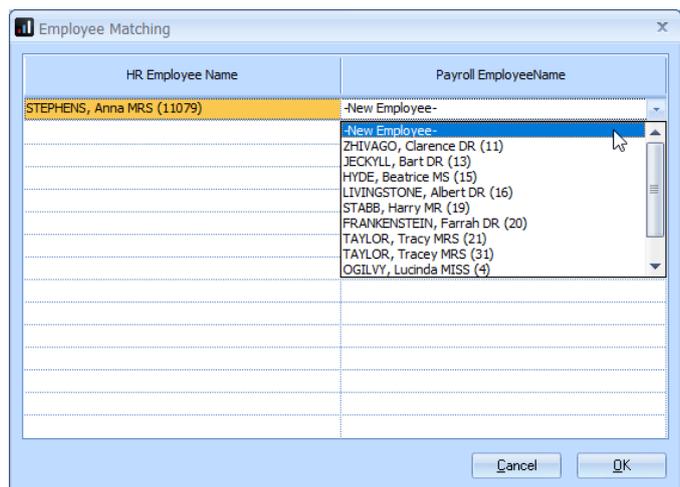
Importing Absence

Any holiday and sickness days are imported during the import process. Payroll will automatically calculate the amount of holiday pay and/or sickness due and will pay this in the current pay period (if applicable).

> The first time you are using HR Integration you will need to check holiday and sickness calculations manually, as absence dates may have already been paid in a previous period. A warning message to this effect will be displayed, click **OK** to continue with the import process.

> **Please Note**: Attachment of Earnings and SMP/SPP/SAP pay elements will not be transferred between HR and Payroll and these will need to be assigned manually in both systems

Once the import is complete the **View/Import from HR** screen will be updated and will show:

- Status – Imported
- The Import Date
- The Import User

Once the import is complete you can continue with your usual payroll process i.e. calculate/finalise. Once payroll is complete, to finish off the period we would advise that you **Send to HR**. This will ensure that the HR records are up to date with the payroll records.

If you are new to payroll, various user guides are available from the **Help | Support | Help & Guides** section. Alternatively, if you need help with a particular screen in payroll, click the **Help** button, which can be found on most screens, (or press the **F1** key on your keyboard) to open the **Manual** directly on the current topic.

Frequently Asked Questions

Can I view links for employees?

Can I delete links for employees?

Can I enter absence in HR to transfer to payroll?

If I change the Start Date in HR will it change in payroll?

Why is the Username field disabled when trying to enter my credentials?

Can I cancel the Send to HR process?

Can I amend details in payroll and send to HR?

How do I create a pay frequency in HR?

How do I enter a Pay Type for an employee in HR?

Do employee codes need to be unique in HR?

What happens if data is entered into IRIS HR and payroll at the same time?

If I take a copy of a company in Admin that is linked to HR, will I have to link the company again?

Can I unlock a pay period that has been closed in IRIS HR?

Can I send my Payroll Calendar information from Payroll to HR?

Can I view links for employees?

Yes, from **Company | HR Links** you can view linked employees.

The screen displays the **HR ID** and **Payroll Name**.

Can I delete links for employees?

Yes, to delete a link for an employee:

1. Go to **Company | HR Links**

2. Choose the employee

3. Click **Delete**

4. To remove the link between payroll and HR click **Yes** to the warning message

## Can I enter absence in HR to transfer to payroll?

Yes, you can currently enter holidays and sickness **only**. Maternity, compassionate leave and unauthorised absence is not transferred to payroll.

If I change the Start Date in HR, will it change in payroll?

No, to change the **Start Date** in Payroll for an employee you need to amend the **Cont. Service** field in HR.

To edit the Cont. Service field:

1. In HR, select **Directories** and then choose the employee

2. Click the **Edit** icon

3. Go to the **Contract** tab

4. Amend the **Cont. Service** field

5. Click **Save**
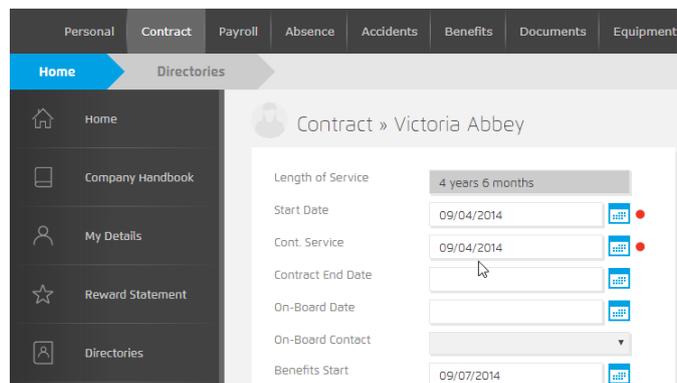
Why is the Username field disabled when trying to enter my credentials?

The **Username** field will be disabled if this has been previously entered, saved and linked to an HR Company. If this needs to be changed, you will need to unlink the company.

If the **Username** and **Password** credentials are already stored, the username will be displayed, and the password field will be shown as *'s. Click **Show Password** to see the details.

Click **Unlink** to remove the following:

- **Username** and **Password** from the **HR Integration Configuration** screen
- **HR Company ID** from the payroll company and the **HR Company Name**
- **HR ID link** from all employees in the payroll company

A confirmation message will be displayed when you have successfully unlinked a company.

Can I cancel the Send to HR process?

A progress bar will be displayed during the "send" process. Clicking **Cancel** will pause the process and a message will be displayed advising that all data may have been sent to the HR system and advising you to check HR for the changes. You will also be asked if you want to cancel sending the data: click **Yes** to stop the process or **No** to resume sending the data to HR.
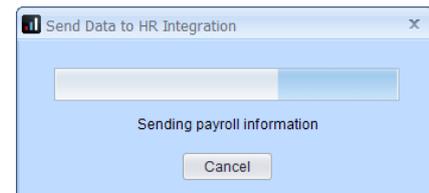

Can I amend details in payroll and send to HR?

Yes, you can make changes to an employee's details in payroll and then send the changes from payroll to HR. In this example, we will change an employee's address and add a monthly bonus:

1. Log into payroll

2. Select the employee and in **Employee Details**, change their address

3. In **Employee Details | Pay Elements | Pay Deds** for the employee, add a new bonus

4. From the side bar, if you have more than one **Pay Frequency** select the one the employee is paid in

5. From the **Company | HR Integration** section choose **Send to HR | HR Integration | Payroll Information**

6. Click **Yes** to the message to confirm

How do I create a pay frequency in HR?

1. In HR go to **System Tools**

2. Choose **Lookup Tables**

3. Click **Payroll** and from the drop-down select **Pay Type**

4. Select **Create New**

5. From the **Type** drop-down select **Pay Type**

6. Next to **Lookup** enter your pay frequency i.e. Weekly

7. Enter **Pay Period Frequency** – this is how many periods there are in the year for the selected Lookup:

   - Weekly   =   52
   - 2 weekly   =   26
   - Monthly   =   12
   - 4 weekly   =   13
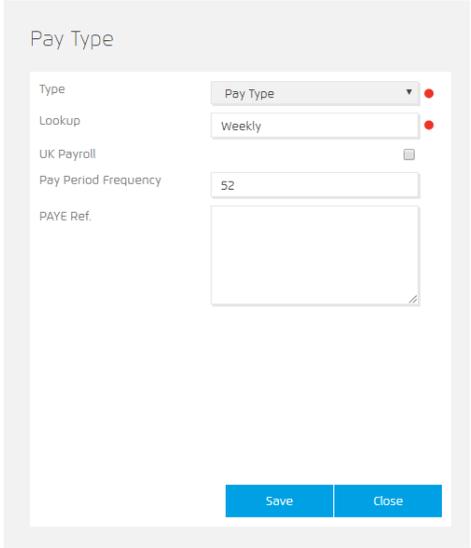
How do I assign a Pay Type for an employee in HR?

1. In HR go to **Directories**

2. Choose the employee and click the edit icon

3. Select the **Payroll** tab

4. Choose the required frequency from the **Pay Type** drop-down

5. Click **Save**

Do employee numbers need to be unique in HR?

Yes, employee numbers in HR must always be unique. If you have multiple companies in payroll, you will need to ensure that there are no employees with the same number.

What happens if data is entered into IRIS HR and payroll at the same time?

Care needs to be taken in this situation. If the payroll user amends a record in HR, and another user amends the same record in payroll, some of the data may be lost when that record is sent between systems. We recommend that work is completed in IRIS HR before continuing in payroll.

If I take a copy of a company in Admin that is linked to HR, will I have to link the company again?

If you use the **Copy Company** option in Admin to create a copy of a company linked to HR, you will need to recreate the HR link in the copy, as it will now have a different company ID number.

Can I unlock a pay period that has been closed in IRIS HR?

Yes, you can unlock the last pay period that has been closed in IRIS HR. To do this:

1. In IRIS Payroll, from the side bar choose the **Pay Frequency** to unlock from the drop-down *

2. Go to **Company | Unlock HR Period**

3. A message will be displayed, click **Yes** to confirm the unlock of the date range (Work Period) or **No** to cancel the process

* only frequencies configured in **Company | Payroll Calendar** will show in the drop-down list.

Can I send my Payroll Calendar information from Payroll to HR?

Yes, this can be sent from **Company | Send to HR**. Choose the **Payroll Calendar** option, this sends the following data to HR:

- Pay Date
- Pay Frequency
- Period number for frequency

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 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 Email: sales@iris.co.uk	Tel: 0344 815 5676 Email: earniesales@iris.co.uk	Tel: 0345 057 3708 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