IRIS My ePay Window

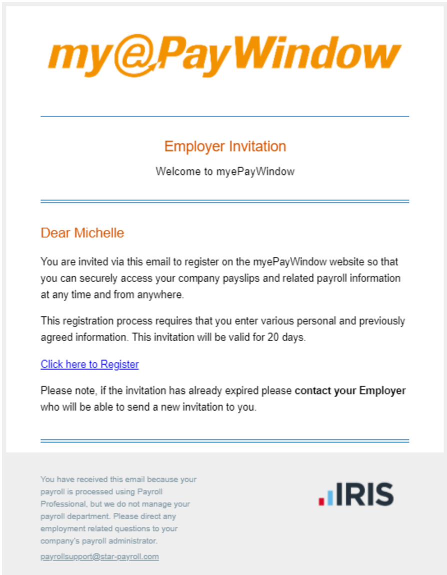
Portal Employer User Guide

IRIS. Look forward

Contents

Employer Registration

Once you, as an Employer user, have been connected and invited to the Portal from the Payroll application; you will receive an email invitation with a 'link' that will take you to the Portal website to start registration. The invitation link within the email is valid for 20 days.



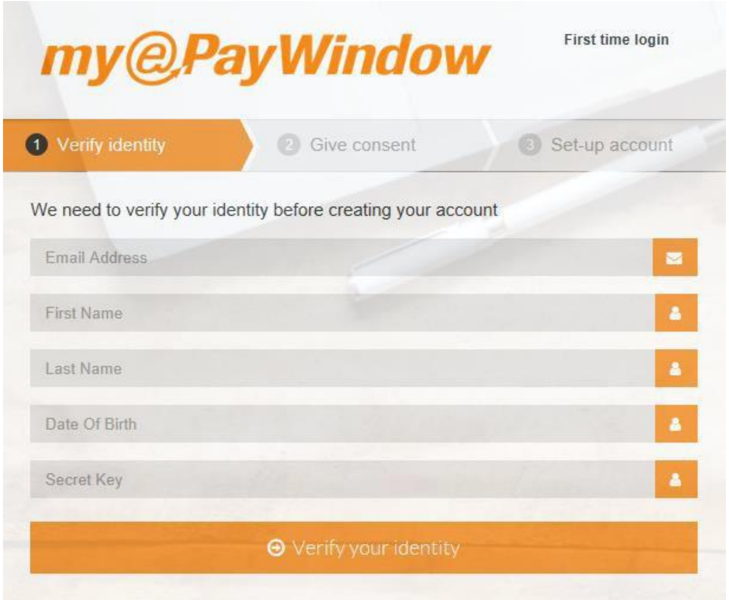
Note: The text in the invitation email differs slightly between Employer users and Employee users in that Employees are advised to have a previous payslip to hand when they go through the registration process as they will require their NI number to verify their identity (or passport number if they don't have an NI Number). We do not explicitly state the requirement for an NI number in the email for security reasons and Employees who do not have an NI number should be individually pre-warned of this registration requirement. Employer users registering will need to have prior knowledge of a 'secret' keyword pre-agreed with the Payroll Bureau or department (see step 1 below)

Registration Step 1 – Verify Identity

The first step of registration is to verify that you are genuine. The details on this screen (see below) need to match your details set up in the Payroll software. All fields must be entered correctly to verify your identity and for the registration process to continue to step 2.

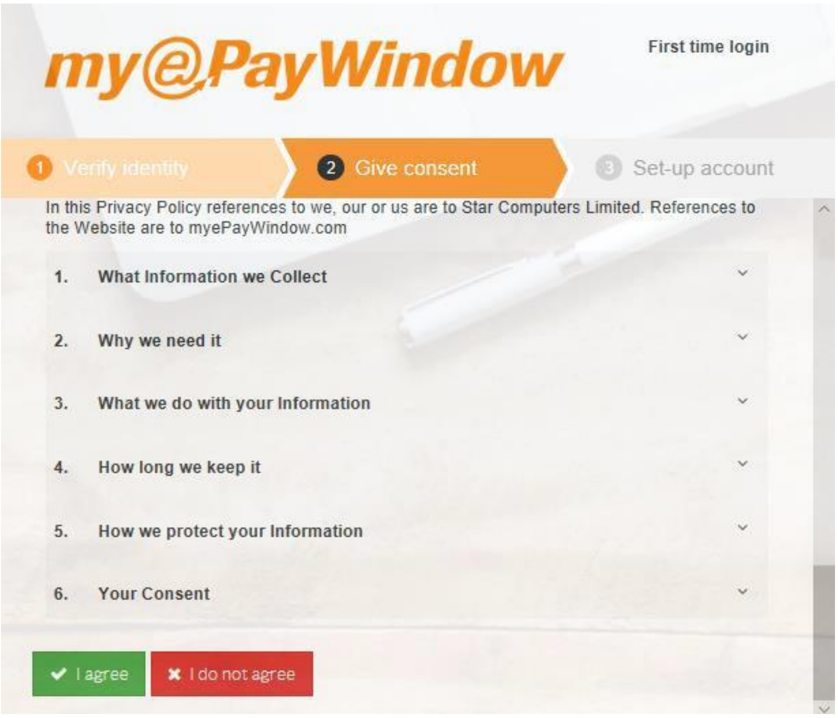
Note: First Name is as per the Payroll Employer or Employee record. If you have more than one name in this field, any one of the names can be entered. For example, if you are known as 'John James' either John or James can be entered in the First Name entry field.

Note: Secret key is a word you have agreed with the Payroll Department user, for example this could be a pre-existing report password.



Registration Step 2 – Give consent

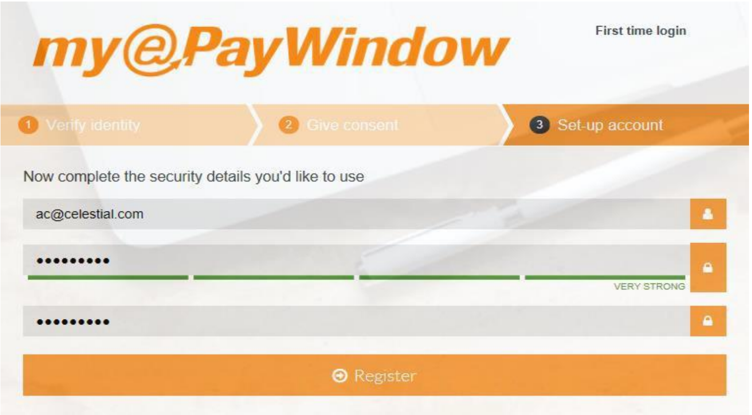
On completing Step 1 successfully, the registration process moves to Step 2, consent. By scrolling to the foot of the **Give consent** window and clicking the **'I agree'** button, the registration process moves to step 3.



Registration Step 3 – Set-up account

This step involves you setting up your Portal username and password:

- **Username** – minimum 6 characters, an email address can be used if this more easily remembered. **Note**: if you are an existing ePayslips user you can use your ePayslips Employer UID if this is more easily remembered
- **Password** – minimum 8 characters, 1 upper case, 1 lower case, 1 special, 1 numeric. Note: an existing ePayslips password can also be used

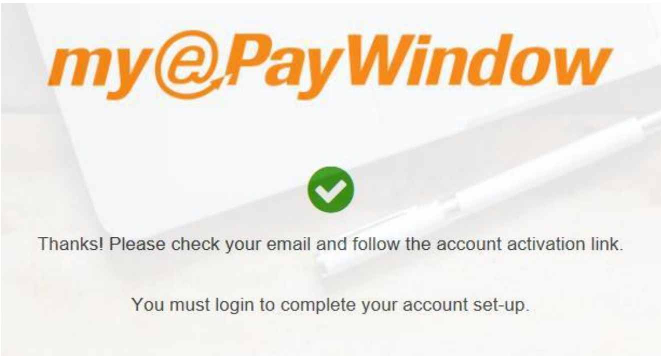


Note: A special character is a punctuation type character from your keyboard such as (!, ?, %, =, *)

The password strength for any entered password is shown dynamically on screen, the password strength indicator will only change to green and very strong, when you have entered a password meeting the criteria.

The password will need to be entered a second time to verify it and you will not be able to register until they match.

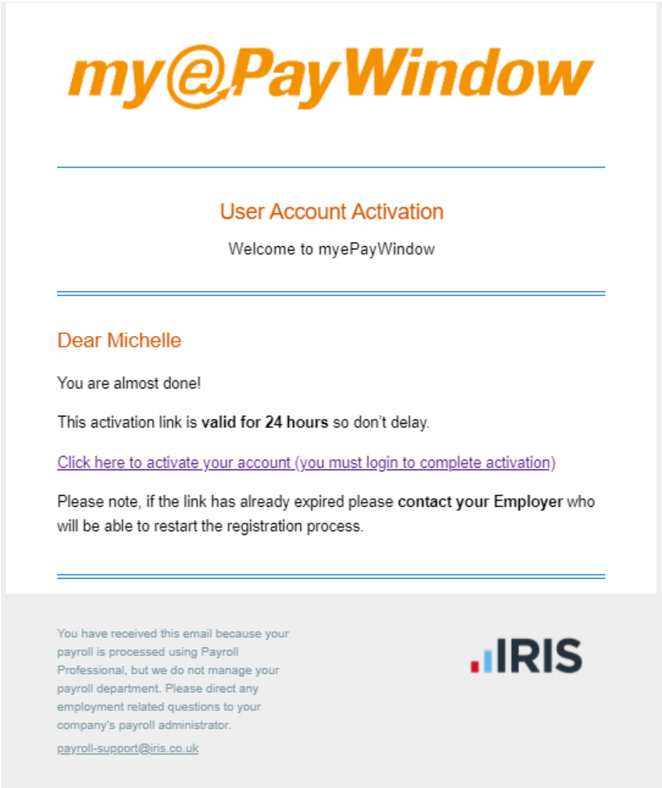
On clicking the Register button, the following message is displayed. You will then receive an email to activate your user account, so the full registration process is not yet complete.



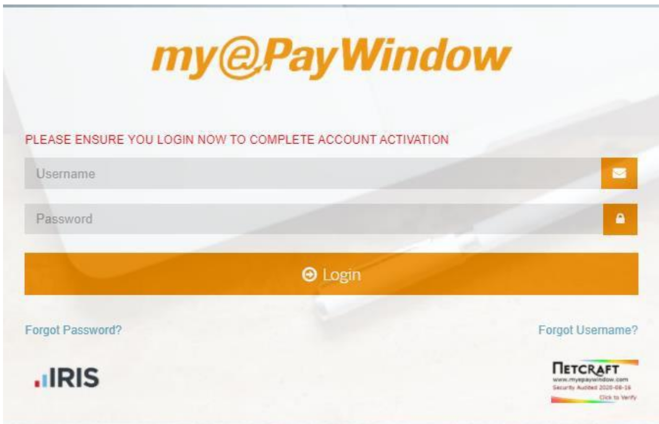
Registration Step 4 - Activate account

The final step in registration involves clicking the activation link in the email sent to you in Step 3, and then successfully logging in to the Portal.

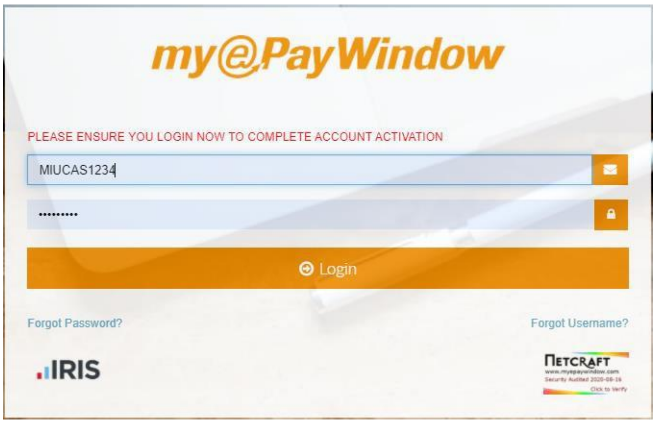
Warning – If the activation link is not used within 24 hours then the registration process will need to be re-started from the link in the initial invitation email if it is within 20 days. If more than 20 days have passed you will need to ask to be re-invited by your Payroll Department.



On clicking the activation link you will be automatically directed to the login screen on the Portal where you must login to complete registration.



Enter the login details created during step 3 and click 'login', this will complete the registration process.



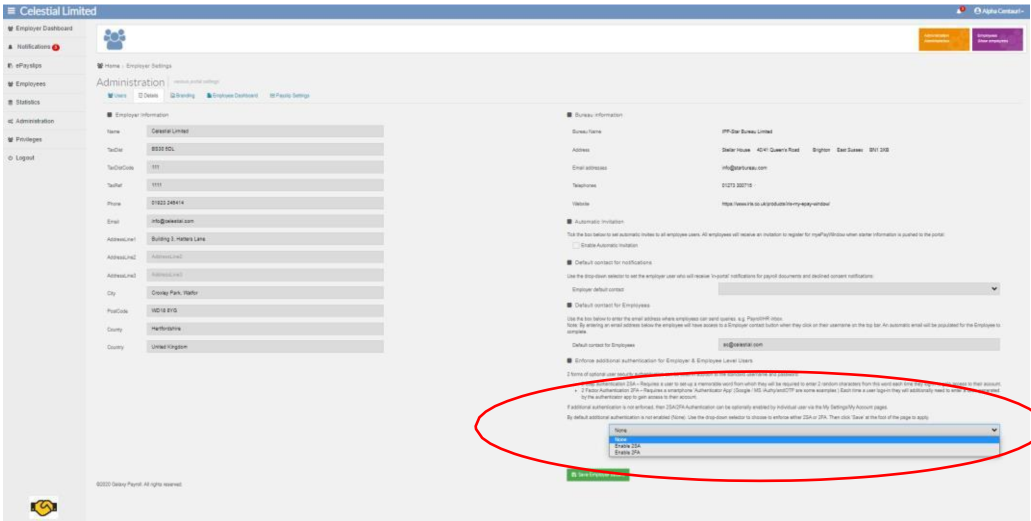
Additional authentication – 2SA/2FA

2 forms of optional user security authentication can be used in addition to the standard username and password:

- 2 Step authentication 2SA – Requires a user to set-up a memorable word from which they will be required to enter 2 random characters from this word each time they log-in to gain access to their account
- 2 Factor Authentication 2FA – Requires a smartphone 'Authenticator App' (Google / MS /Authy/andOTP are some examples) 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

If additional authentication is not enforced, then 2SA/2FA Authentication can be optionally enabled by an individual user via the My Settings/My Account pages.

By default, additional authentication is not enabled (None). Use the drop-down selector to choose to enforce either 2SA or 2FA. Then click 'Save' at the foot of the page to apply.



2 Step Authentication

If 2SA is enforced for your users, the user will be asked to create a memorable word. The Memorable word can only contain letters and digits and be between 6 and 12 characters in length

Clicking **Submit** saves the memorable word to your user account

Once a username and password are entered a second page is displayed where the user must enter two random characters from their memorable word.

A message is displayed if incorrect characters are entered.

After 3 incorrect attempts the account will be locked.

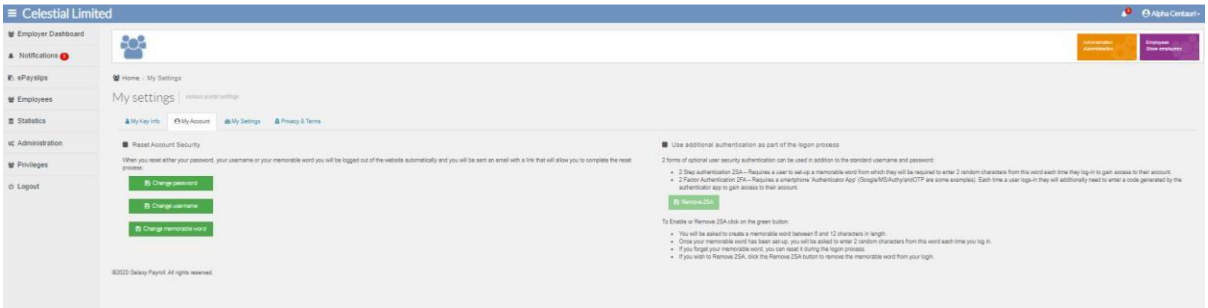
If the account is locked the user will need to wait an hour to re-enter the 2 characters from the memorable word or contact their Bureau/Employer to unlock the account.

Forgot Memorable word reset during login

To reset the memorable word, click the 'Forgot Memorable Word' link

Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the memorable word and gain access to their account

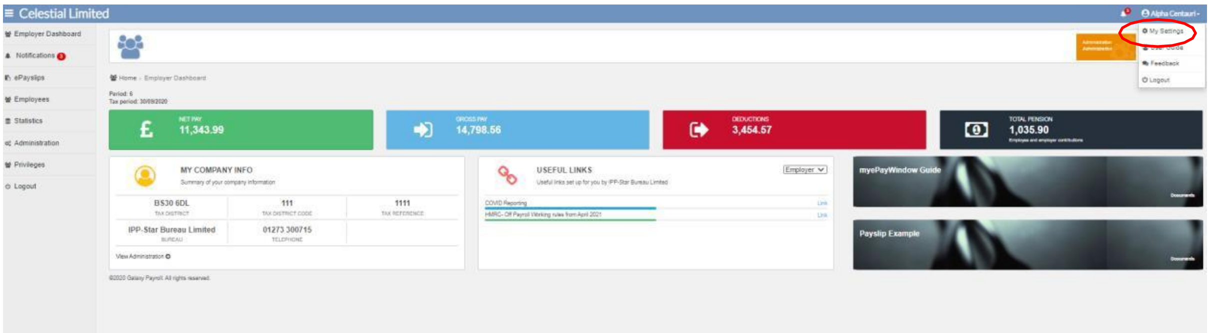
As 2SA has been enforced at company level the User will be unable to edit personal settings under My Settings/ My Account.



Individual User 2SA Activation

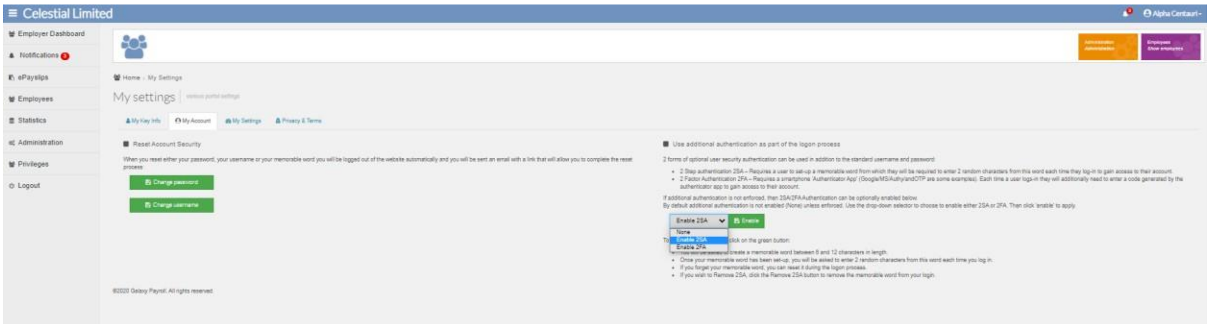
An individual can Enable 2 Step Authentication for their myePayWindow account provided that 2SA has not been enforced via Administration at Employer/Bureau Level.

From the Top-bar, click on the username and My Settings.

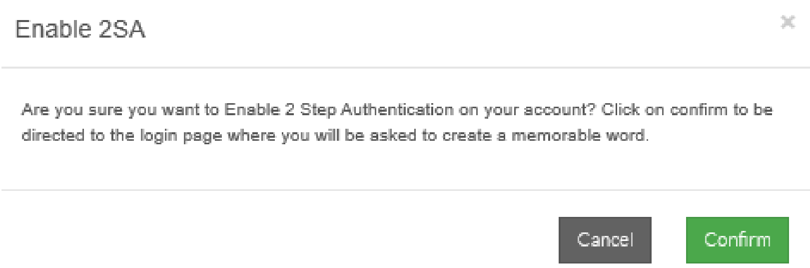


On the My Account tab, click the Enable 2SA button.

If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.



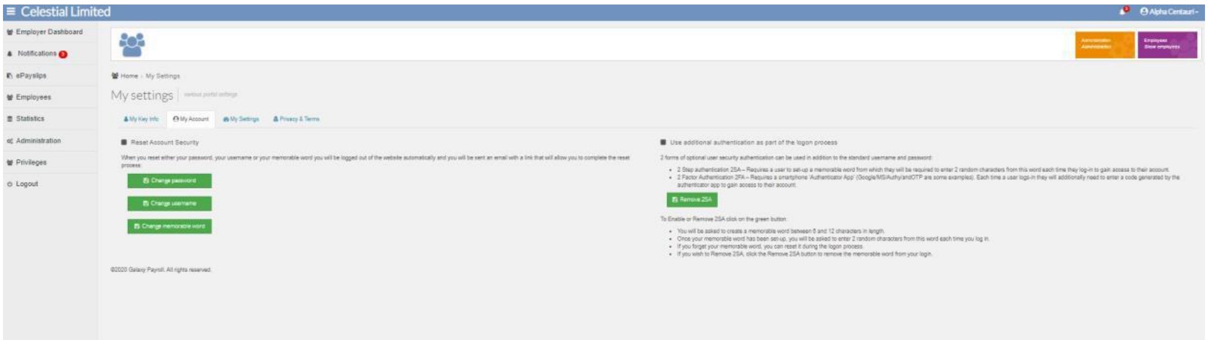
Click the confirm button to set-up your memorable word.



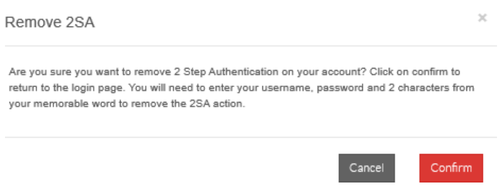
Users will be next asked to enter their username & password, after which they can 'set-up' the memorable word. The Memorable word can only contain letters and digits and be between 6 and 12 characters in length.

If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.

If 2SA is not enforced, a user can Remove 2SA from their account via My Settings/My Account and the Remove 2SA button.



Once a user has confirmed this action, they will be directed to the login page.



Enter the Username, Password and 2 characters from your memorable word to confirm the remove 2SA action.

Forgot Memorable word reset during login

To reset the memorable word, click the 'Forgot Memorable Word' link

Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the memorable word and gain access to their account.

2 Factor Authentication

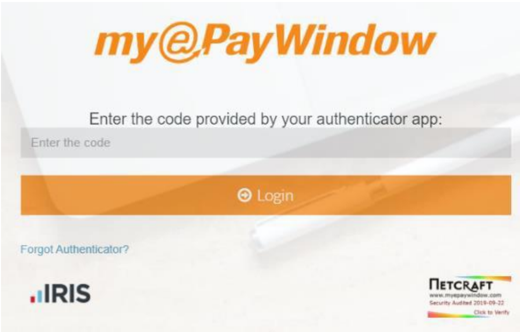
If 2FA is enforced for your users, the user will be asked to scan/enter a QR code:

Ensure you have your "authenticator app" installed on your smartphone.

Scan the code or enter manually to access your account.

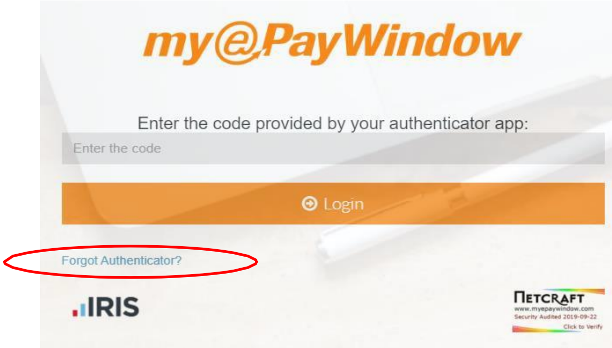
Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in "Authenticator". Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.



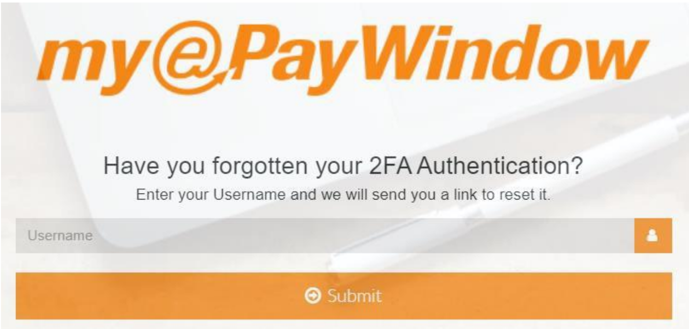
If the account is locked the user will need to wait an hour to re-enter or contact their Bureau/Employer to unlock the account.

Forgot Authenticator - reset during login

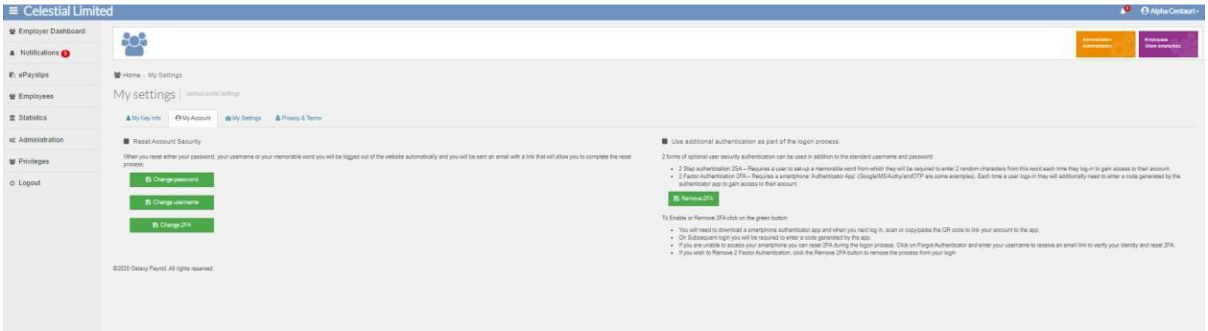


Click on **Forgot Authenticator?**

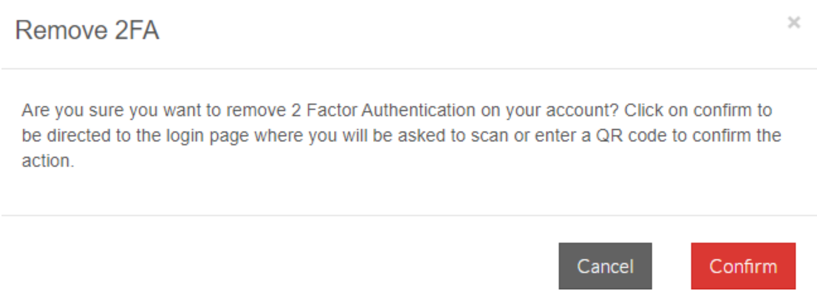
Enter your username to receive a reset link via email. The User must provide the verification details in the email to reset the authenticator and gain access to their account



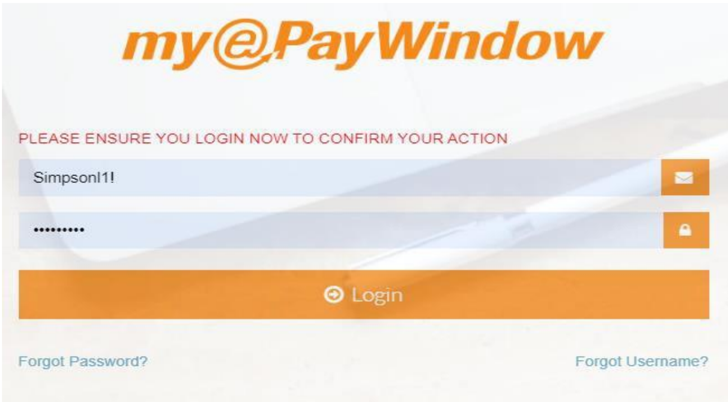
If 2FA is not enforced, a user can Remove 2FA from their account via My Settings/My Account and the Remove 2FA button.



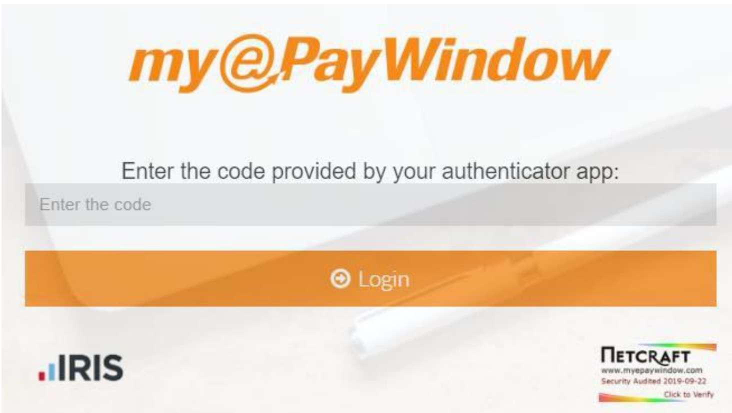
Once a user has confirmed this action, they will be directed to the login page.



Enter the Username and Password



Enter the code provided from the authenticator app to confirm the removal of 2FA



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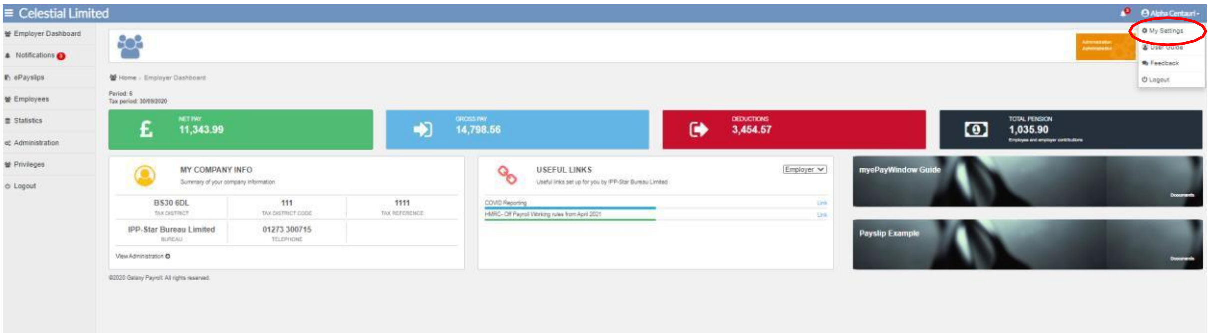
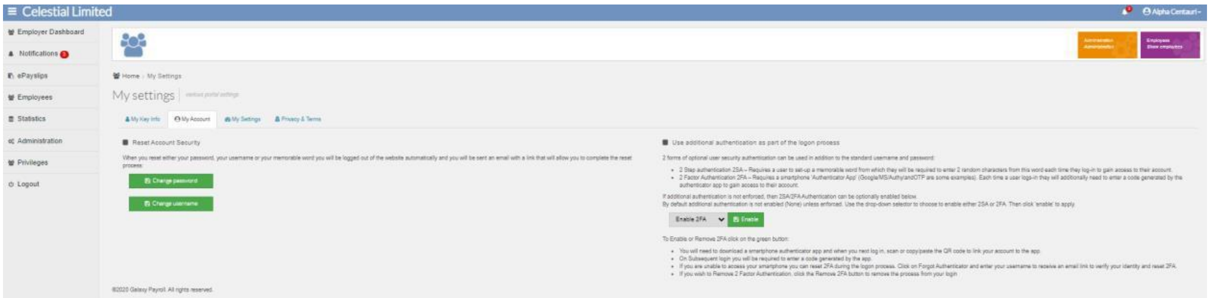
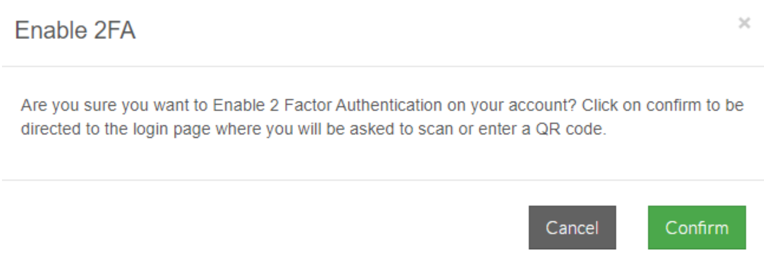


If the Enable 2SA/ Remove 2SA button is greyed out, 2 Step Authentication has been enforced and users cannot change this setting.

Click the enable button to set-up 2FA



Click on confirm



Users will be next asked to enter their username & password, after which they will be asked to scan the QR code or add manually using the authenticator app.

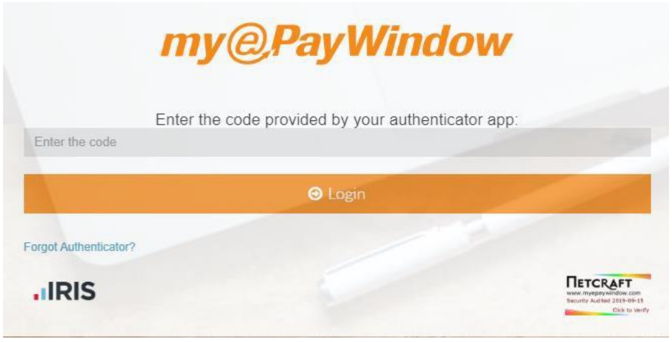
Ensure you have your “authenticator app” installed on your smartphone.

Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in “Authenticator”. Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account.

Enter the code provided and you will access your account.

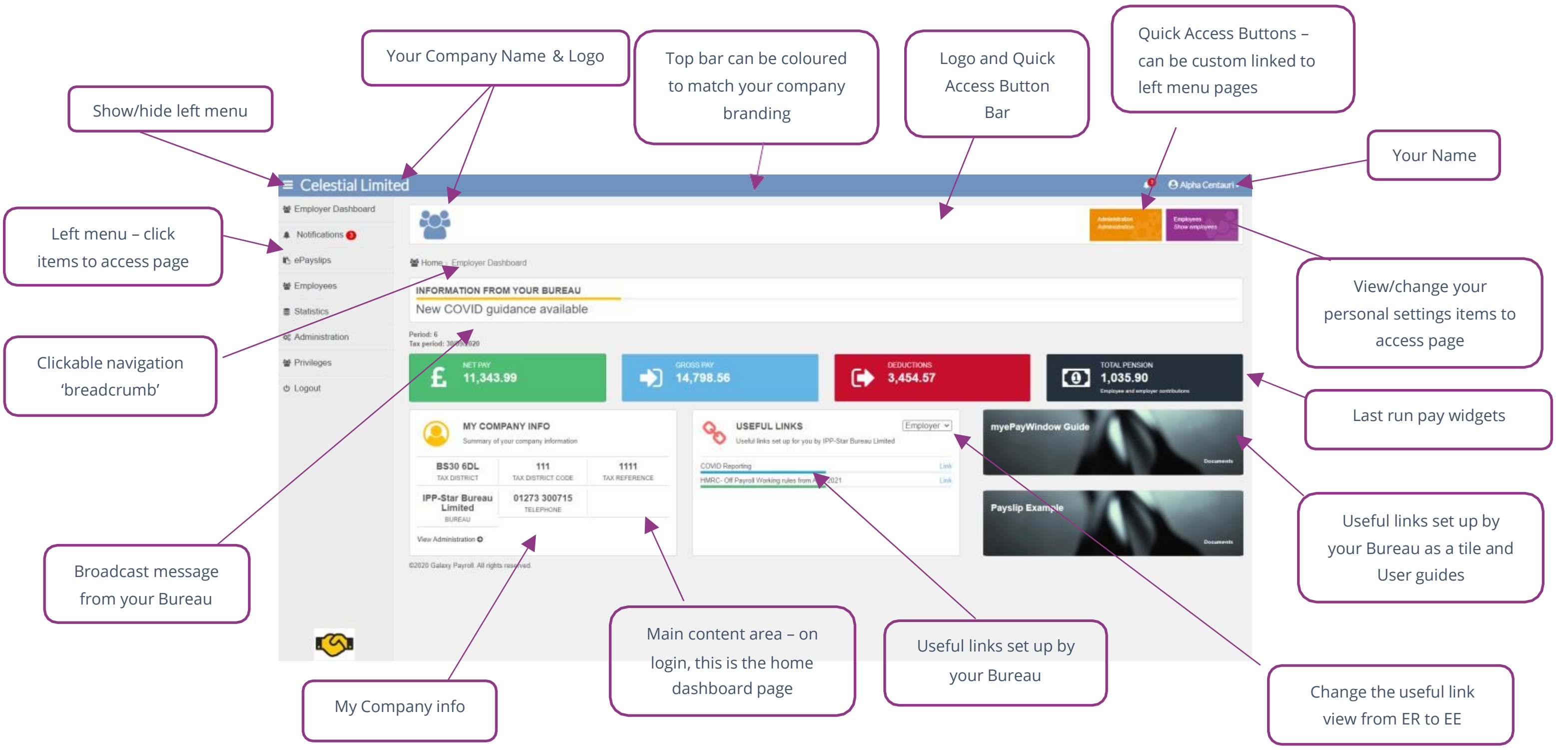
Enter the code provided



Using the Portal

myePayWindow user interface

The diagram below describes the main elements of the Portal site. The layout and options are essentially the same for all Portal users, the main difference being the options available in the 'Left-menu' and the contents of the home-dashboard page.



After logging in to the Portal you will arrive at your Home-Dashboard page from where you can access various menu options and Portal features:

- **Home-Dashboard** – Your home screen, provides data insights regarding your Payroll activity, last pay run, Company info and Pension contributions for the last pay run
- **Notifications** – a list of various notifications regarding your Payroll, for example payslip and report delivery
- **ePayslips** – Listing of all payslips, CIS Statements, P60s, P45s and P11Ds that have been sent to the Portal, payslips/statements for each period can be opened and viewed
- **Employees** – Listing of current employees and leavers. Current employees are displayed by default and a leavers view can be switched using the Current-Leavers drop-down selector
- **Statistics** – Population Statistics – A snapshot from the last month provides graphs by month or for a selected period

- **Administration** – This is the Portal Administration area for your Company and Employees for you as the Employer
- **Privileges** – This is where you can create Employee Groups based on the Analysis Groups held in Payroll, add your Employees to, create roles, set custom Privileges, and assign Employer Users
- **My Settings** – This is where your personal Portal settings can be viewed and changed. This includes setting 2SA/2FA and enabling email notifications

Top bar

The **Top-bar** (see above) appears at the top of the Portal screen and can be coloured to match your company branding.

The information displayed on the **Top-bar** from left to right is as follows:

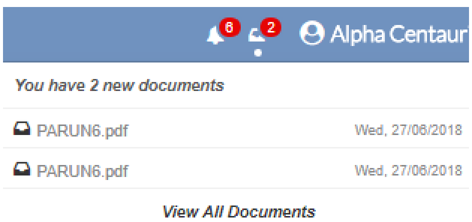
- **Burger icon** – hides/shows the Left Menu
- **Company name** - Your company name
- **Notification alert icon** – shows the number of new notifications
- **Logged in User Name** – Your name

Burger Icon and Company name

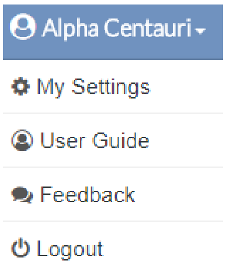
The **Burger icon** next to the company name allows you to collapse the Left Menu, allowing the main Portal content to be maximised in the display area.

Notification and Document alert icons

The **Alert icon** badges show you the number of new items received for Notifications and Documents, clicking on either of the **Alert icons** will allow you to see summary of the corresponding new items and you can access them directly using the 'View All Documents/Notifications' link.



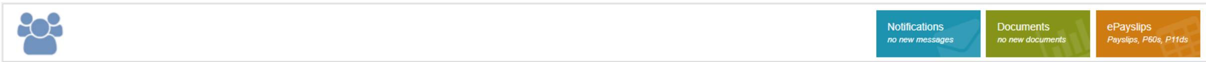
Logged in User Name (you)



By clicking your **User Name,** you can access the My Settings area, user guide and other options as per the dropdown list displayed.

Logo & Quick Access bar

The **Logo & Quick Access** bar is located directly under the **Top bar**.

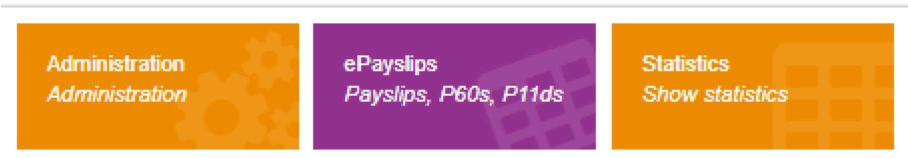


When a Logo has been set (see **Administration – Branding** section) it will display on the left-hand side of the **Logo & Quick Access** bar.

Additionally, a Logo URL can set up so that when a user (Employer or Employee) clicks the Logo image (see above) they will be redirected to the web page specified.

A Bureau logo can be set up to show on the base of the Employers left menu (See **Administration – Details** section)

The **Quick Access buttons** appear on the right-hand side of the **Logo & Quick Access** bar. The quick access buttons can be customised so that they link to the left menu page options as required (see **My Settings – My Settings**)

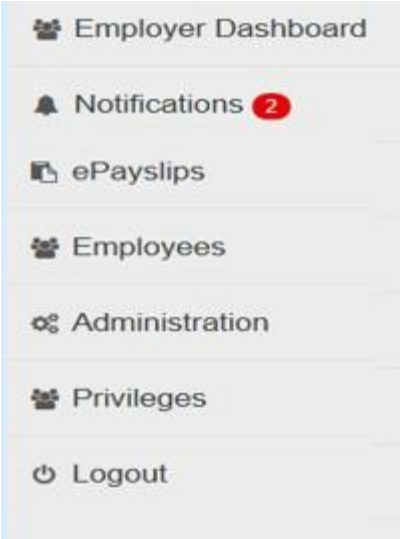


Navigation 'Breadcrumb'

The **Navigation breadcrumb** shows the site location for the current page. You can click on the various sections within the **Navigation breadcrumb** to navigate to the page required (so in the example above by clicking 'Employees Listing' you will go back to the Employees Listing page)

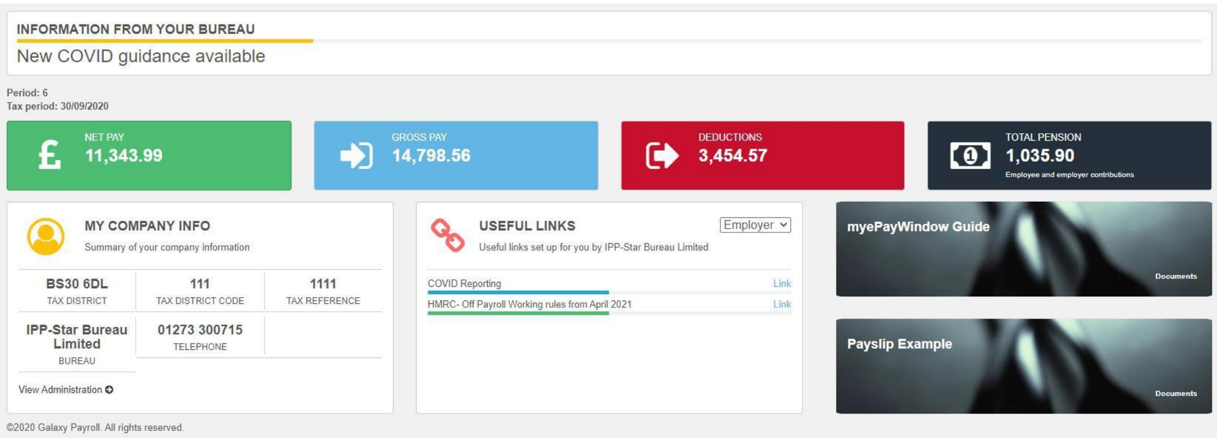
Left Menu

The Left menu allows you to access the main content pages within the Portal. For Notifications, the number of new items received is displayed in the menu in a red 'alert badge'.



The options available in the left menu vary according to your Portal User type. For example, Employees have no access to Employees or Administration and can only see their own information.

Home-Dashboard page



As the name suggests the Home – Dashboard page is your site home page and is where various 'dashboard' content is displayed.

Broadcast Message – Your Bureau can set up a Broadcast message that will show on all Employer dashboards. Employer users can set up Broadcasts for their employees by clicking on

View Administration or accessing **Administration**/**Employee Dashboard** from the left menu. Please see the administration section for further guidance.

The Home-Dashboard is where various dashboard widgets can be displayed to show summary information relating to your payroll

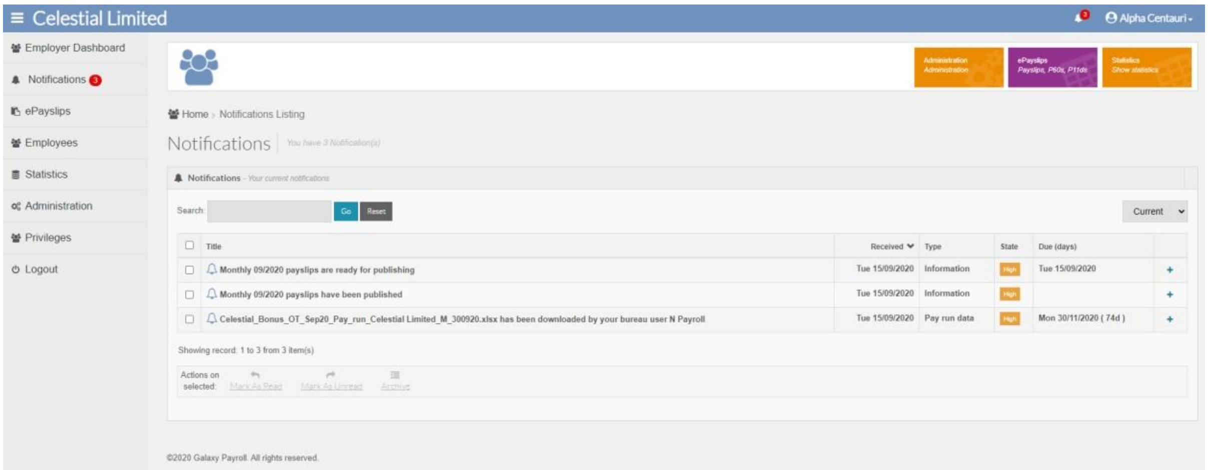
My Last Pay Run widget, this shows the breakdown for the last pay run, Period details, the Total Pay, Deductions, Net Pay & Total Pension contributions (ER & EE) these figures are a total for all employees paid in the period. The ePayslips can be accessed from this by clicking on the widget.

Note: If Employer Privileges are enabled and users **do not** have access rights to all information the **My Last Pay Run widget** will not show.

The **My Company Info** widget displays Employer Tax information – Tax district, Tax District code and Tax Reference. Your Bureau name and telephone number if relevant. You can access your company Administration settings by clicking on **View Administration**.

The **Useful Links** widget displays useful links that have been set up by your Bureau to display on the employer dashboard. You can create Employee useful links by clicking on **View Administration** or accessing **Administration**/**Employee Dashboard** from the left menu. See the Administration section for further guidance.

Notifications



The Notifications page shows various notifications that are sent to you. Notifications are a result of actions carried out in the Payroll application or actions on the Portal. You can click to sort on the various column headings in the notification list.

To manage your notifications, you can mark them individually or collectively as ‘read’ and remove them from the ‘current’ view by archiving them. Use the **Current/Archive selector** at the top right-hand side of the notifications list to switch views.

As an Employer you receive Notifications after the following events:

- Payslips have been published – On the day when Employees are able to access their payslips
- P45s have been published– when P45s are uploaded by your Payroll Bureau/Department
- [YearYYYY] P60s have been published for [X] Employees – when P60s are uploaded for X number of Employees by your Payroll Bureau / Department
- Warning that a document will be deleted in 10 days – reminder to download a copy if you want to retain a copy
- AE letters have been uploaded for [X] Employees – where X is the number applicable
- An Employee has declined consent to use the Portal either during or after Portal registration
- An Employee Leaver Portal account will be deleted in 10 days
- An Employer Leaver Portal account has been deleted
- Portal terms and conditions have been updated – myePayWindow usage terms have changed, and you will need to confirm your agreement

Notes:

[1] In the current Portal version, these notifications are only sent to the default Employer User, you define this user via **Administration - Details**

Archived notifications are automatically deleted by portal housekeeping routines 3 months after their 'due' date' or the 'received date' when there is no notification due date.

You can choose via **My Settings** if you want to receive an email reminder summary for new notifications received in the past hour.

Notifications have the following features:

- Title – Description of the notification
- Received date – the date the notification is received
- A 'Type' – either Pay run data, Starters and leavers, Other, Registration, Information
- A 'State' – High (needs attention), Moderate, or Low (most are High by default)
- Due date (Xd) – For documents sent by Employers, the accompanying notification will show the pay date for which the document applies and how many days (Xd) remain between now until this date (this will dynamically update)

Notification actions:

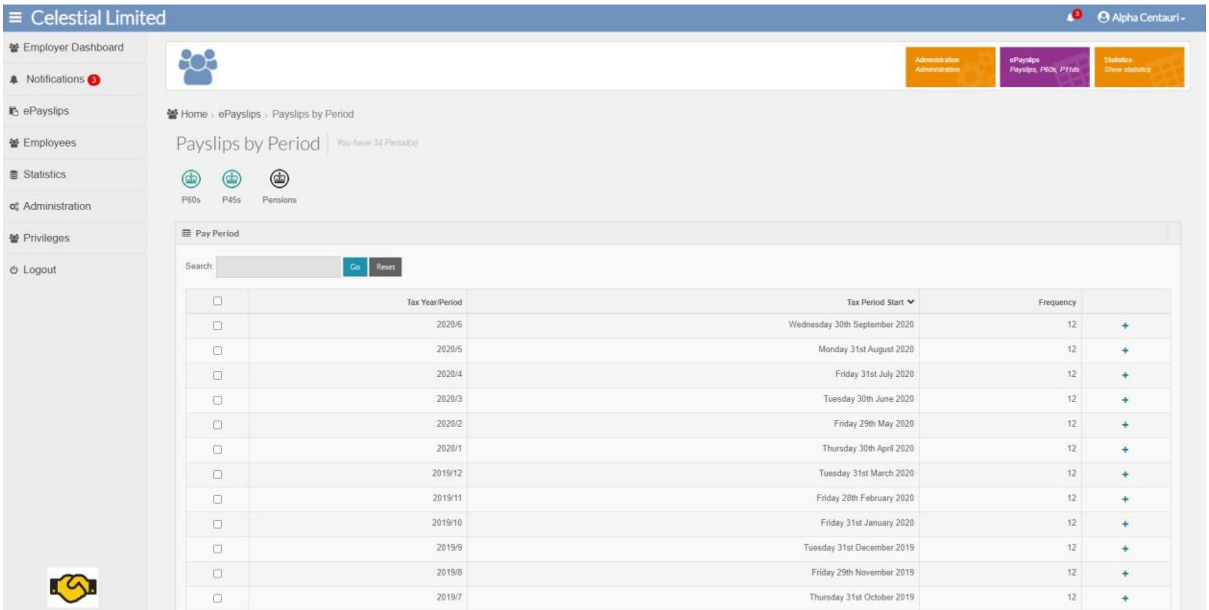
Click **'+ / -'** in the end column or anywhere on notification to expand or collapse view to see 'item actions'

- Mark as Read/Unread – this decrements/increments the Icon 'badge' in the menu and top bar and bolds/ un-bolds the entry in the listing
- Archive / Un-Archive – once read a notification can be moved to the archive list
- Payslip – view the payslips
- Multi-select Actions – by clicking the select tick-box you can select multiple notifications and apply actions from the actions shown at the footer of the notifications listing e.g. Archive or Mark as Read

ePayslips

Payslips by Period

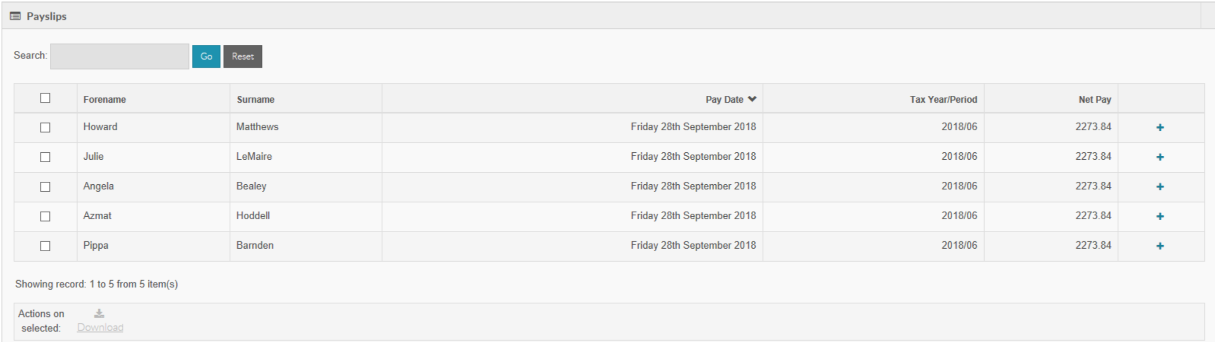
The ePayslips left menu option displays the Payslips by period page. For each period in the list payslips are available to either view or download for all employees that were payroll processed.



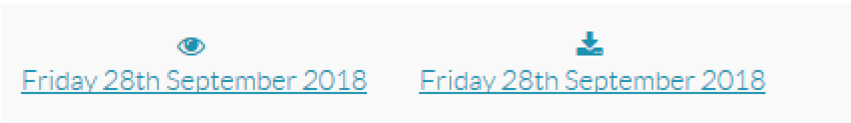
Click on a period in the listing to expand the entry and access the 'View' action:

Click the **view action** for the Pay period chosen:

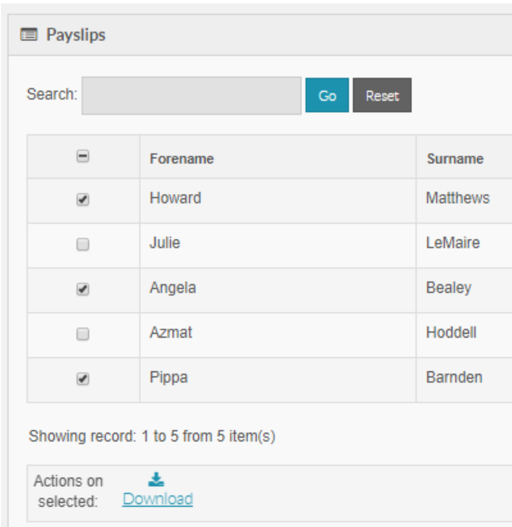
This will open a page listing of employees.



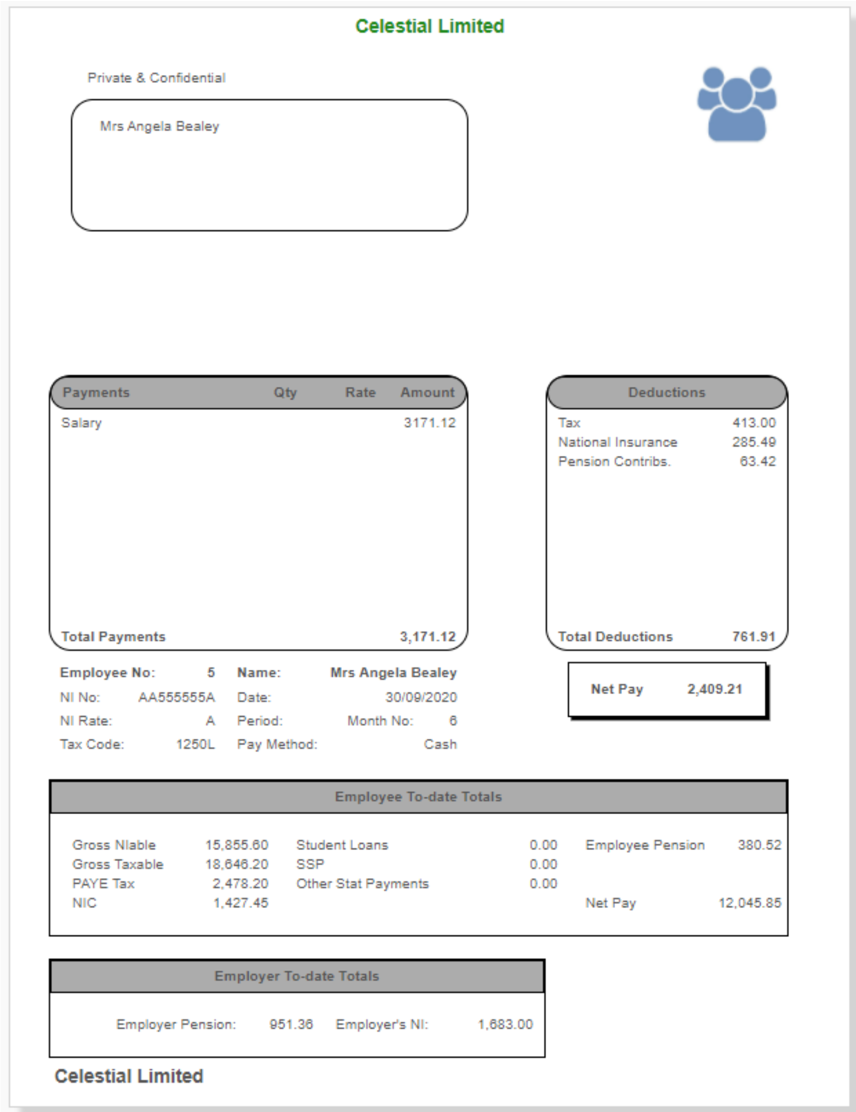
Click on any Employee name to access actions to either **view** or **download payslips** as required.



To download payslips for all employees use the check-box in the header of the first column to select all, or selectively set the check-box against required Employees and then at the footer of the Employees list click **Actions on selected**: **Download**



When viewing an online payslip, you can use the **Previous** and **Back** buttons to scroll through each employee's payslips in the selected period. The payslip layout will display according to the template you have set (see **Administration-payslip settings**)



Celestial Limited

Private & Confidential

Mrs Angela Bealey

Payments	Qty	Rate	Amount
Salary			3171.12
Total Payments			3,171.12

Deductions	
Tax	413.00
National Insurance	285.49
Pension Contribs.	63.42
Total Deductions	761.91

Employee No:	5	Name:	Mrs Angela Bealey
NI No:	AA555555A	Date:	30/09/2020
NI Rate:	A	Period:	Month No: 6
Tax Code:	1250L	Pay Method:	Cash

Net Pay 2,409.21

Employee To-date Totals					
Gross NIable	15,855.60	Student Loans	0.00	Employee Pension	380.52
Gross Taxable	18,646.20	SSP	0.00		
PAYE Tax	2,478.20	Other Stat Payments	0.00		
NIC	1,427.45			Net Pay	12,045.85

Employer To-date Totals			
Employer Pension:	951.36	Employer's NI:	1,683.00

Celestial Limited

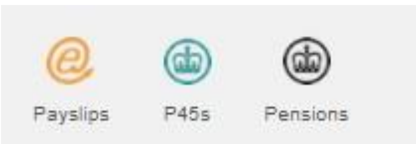
Payslips Migrated from IRIS OpenPayslips

Follow the steps above for ePayslips. The only difference with migrated payslips is you can only download them; you cannot preview them.

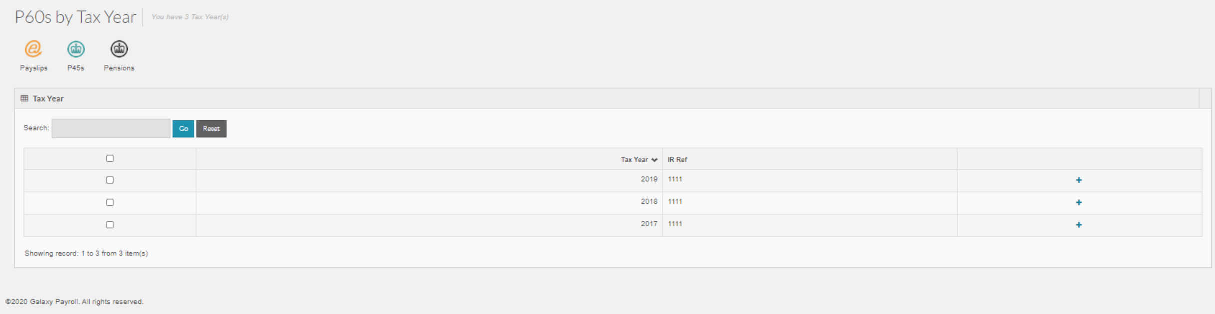
P60s

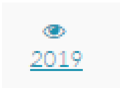
From the Payslips by Period page click the P60s icon to view your P60s by Period (as available & when uploaded by your Payroll Department/Employer)

Click icons to switch view to Payslips by Period or P45s



Search for P60s by Tax Year, click column heading to sort ascending, descending, click '+ / -' or anywhere on the entry to expand or collapse the view to open the view icon.



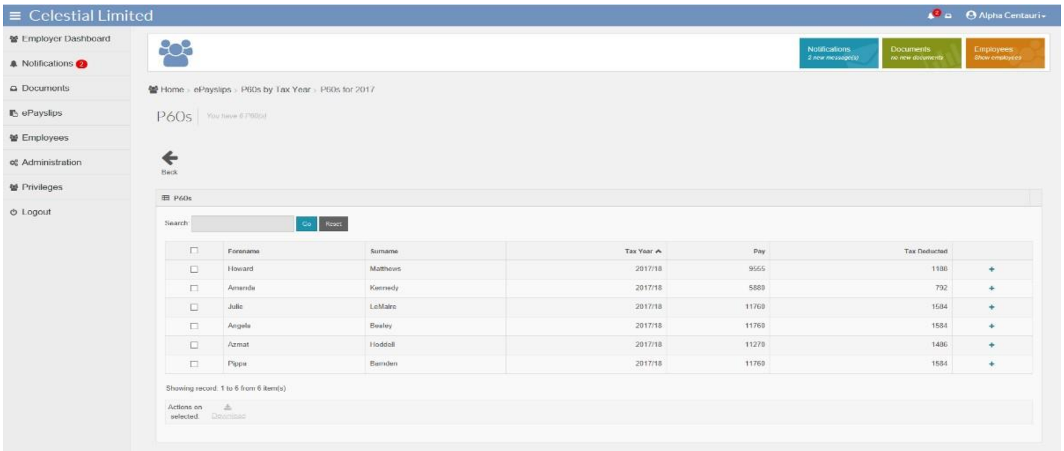


To view P60s for Tax year, click on the view icon for the selected Tax Year.

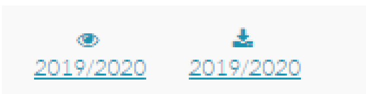
You can search P60s in the listing by Forename, Surname, Tax Year, Pay, Tax deducted (click column heading to sort ascending / descending).

To 'select all' use the checkbox at the top of the first column, this allows a multi-select download action. Clicking  will download P60s for Employees selected.

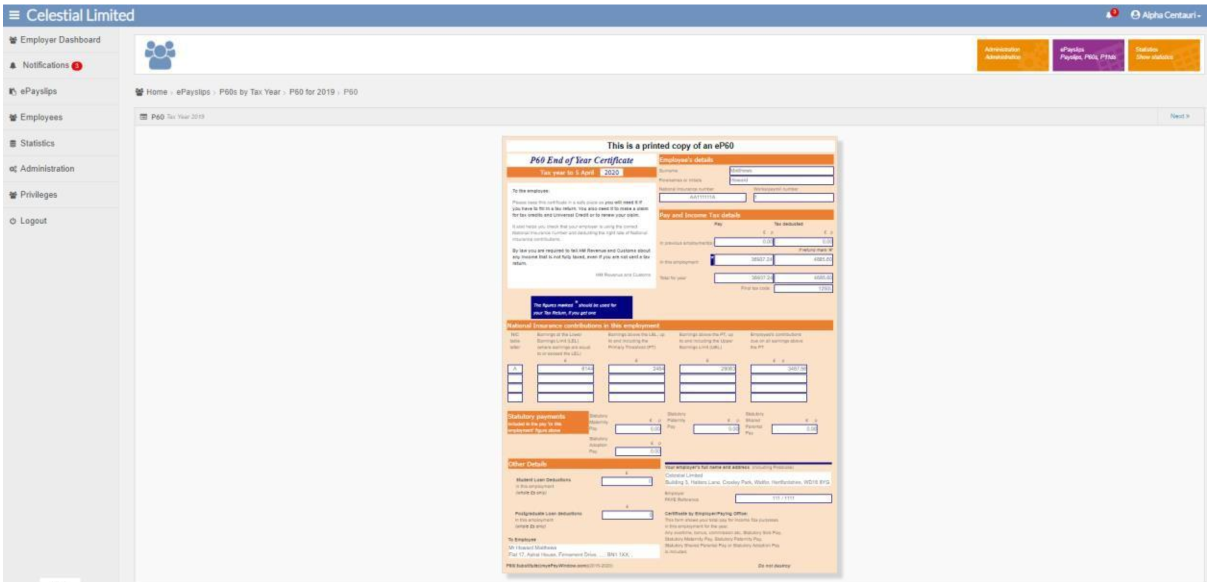
Click '+ / -' or anywhere on P60 entry to expand or collapse view, to view or download



P60 actions for period by employee; **View** or **Download**



Click on the Navigation Breadcrumb to go back to P60 listing by Employee or Tax year or (or Home etc.)



Note: P60's should be run at the appropriate time of distribution e.g. At year end to ensure that any leavers that left during the year are removed from the P60 upload. You are unable to delete P60s from the secure transfer box once uploaded.

You can export the P60 report as a document and upload to the portal.

P45s

The leaver tick box needs to be entered against the Employee record in Payroll in order for the Employee to be shown as a 'leaver' in the Portal Employees listing. This can be via the leaver tick box or when you close the period.

To create the P45, a leave date must be entered in Payroll.

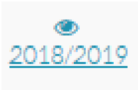
P45 View in myePayWindow

From the ePayslips by Period page click the P45s icons to view your P45s by Period (as available & when uploaded by your Bureau/Payroll Department)

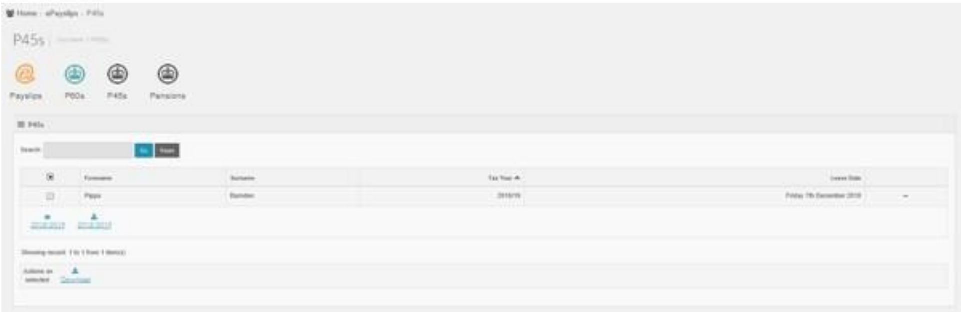
Click icons to switch view to P45s, P60s, Payslips by period or Pensions

Search for P45s by name or leave date, click column heading to sort ascending, descending, click '+ / -' or anywhere on the entry to expand or collapse the view to open the view icon.

To view P45s, click on the view icon for the selected Tax Year.

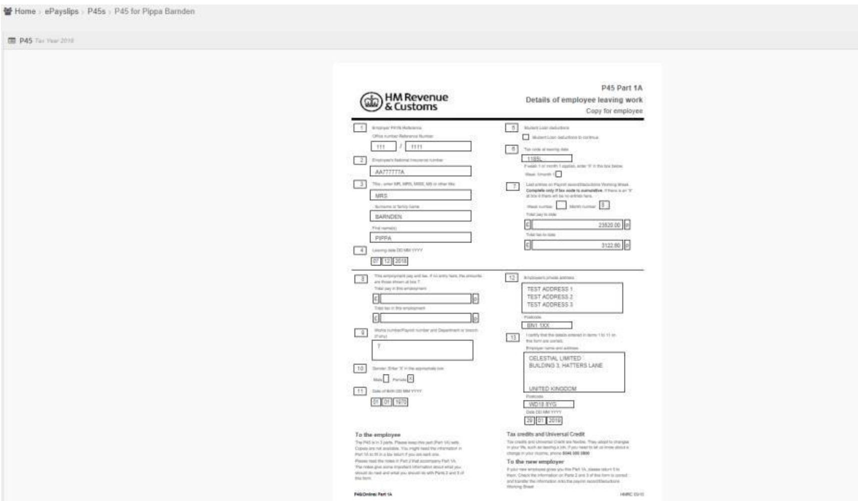


To 'select all' use the checkbox at the top of the first column, this allows a multi-select download action. Clicking Download will download P45s for Employees selected.



P45 actions for period by employee; **View** or **Download**

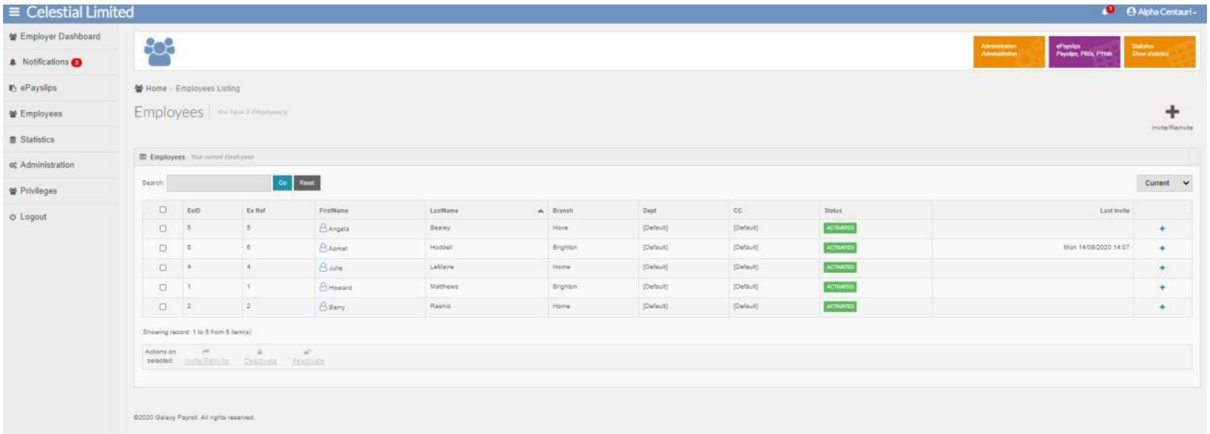
Click on **View** (see below) or **Download** to a PDF document



Click on the Navigation Breadcrumb to go back to P45 listing by Employee or Tax year or (or Home etc.)

Employees

The **Employees** option in the **Left Menu** opens a page showing all Employees within your company and their status on the Portal. Click anywhere on an Employee user entry, or on the **'+'** button to see the actions available for each individual Employee – the actions available will vary depending upon the user status. Multi-select actions are also available.

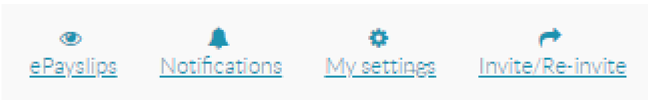


Portal status definitions

A Portal user's status (Employer User, Employee) will be one of the following.

- **Unregistered** – user (Bureau User, Employer User, Employee) not yet invited
- **Invited** – Invitation sent from Payroll or myePayWindow no action taken by user yet. A date & time stamp of when the user was last invited will show in the last column on the grid.
- **Activating** – User has received invitation and is going through registration
- **Activated** – User has completed registration and is set up
- **Deactivated** – User account has been Deactivated by Employer or Bureau
- **Declined** – User has not given Consent, or withdrawn Consent
- **Locked** – User has five failed login attempts, account locked for one hour
- **Privacy Pending** – User has not yet agreed to recently updated terms of use/Privacy

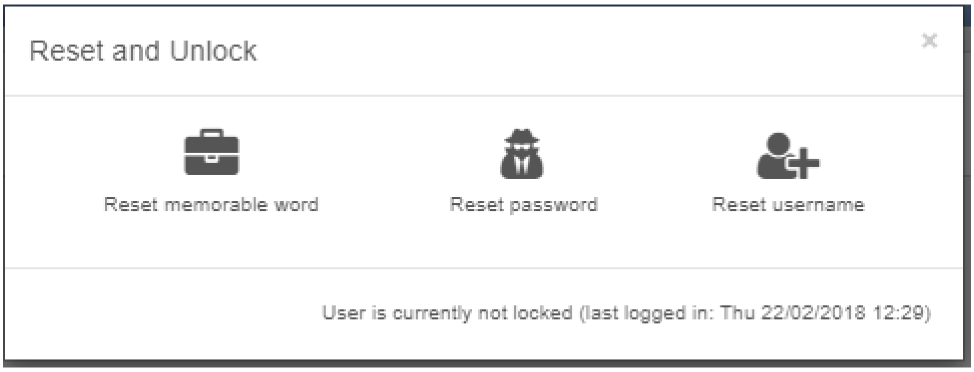
For Employees with a status of Unregistered, Invited, Activating or Declined, the actions available are as follows:



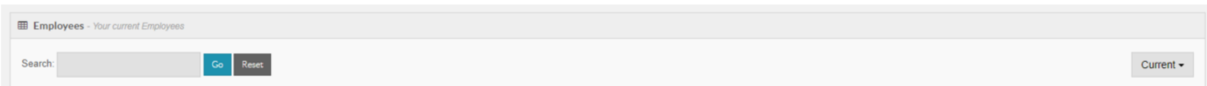
For already Activated or Deactivated Employees additional actions are available to either Deactivate or Activate.

The actions for available for each employee are:

- **ePayslips** – view payslips, P60s, P45s for the selected Employee
- **Notifications** – see the notifications sent to an Employee
- **My settings** – access the Employee settings (see the email address they have used for their Portal account)
- **Invite/Re-invite** – Send Invitations and re-invitations for Employees not currently registered
- **Deactivate-Reactivate** – temporarily deny-reinstate activated Employee access to the Portal
- **Reset/Unlock**– Send / initiate a reset email for a specific Employee for Memorable word/Password and username. Details also state if the user is locked out and the last login date & time



Leavers view



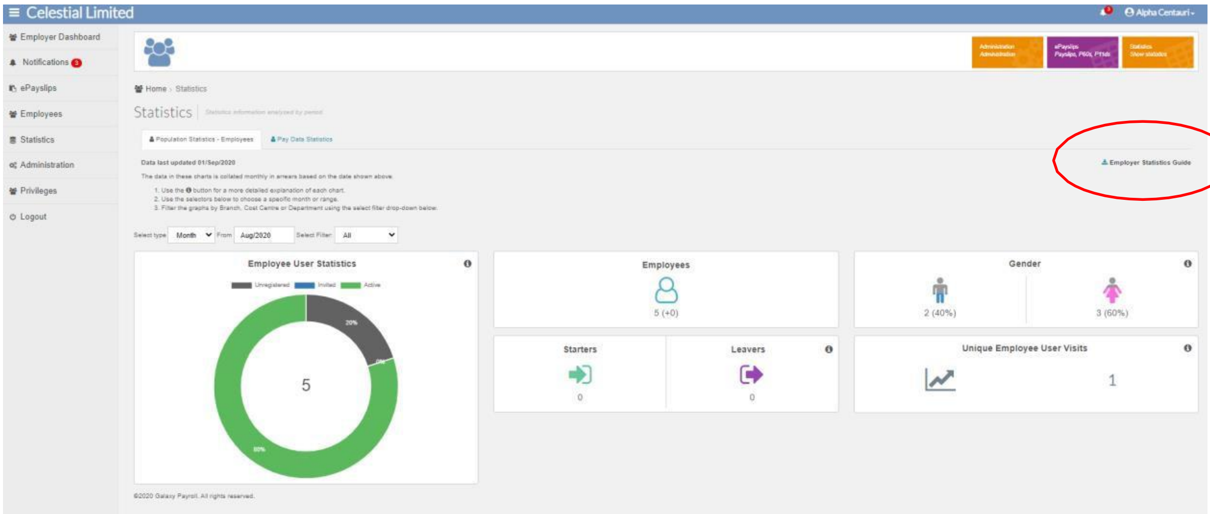
Use the drop-down selector at the top right-hand side of the Employees listing to switch the view to see Employees who have been set as 'leavers' by your Payroll Bureau or Payroll department in the Payroll software application.

Access to myePayWindow, for leavers shown in this view, will remain open for 15 months after their leave date so that Employees have sufficient time to download their payslips and other documents. 15 months after their leave date their account is automatically deleted and then after a further 1 month their data is automatically removed from myePayWindow. Both the Employee and the Employer will be sent notifications 10-days in advance of the account closure and the Employer is notified when an Employee account is finally closed.

You can manage Employee leavers until their account removal as per 'current' Employees using the actions available.

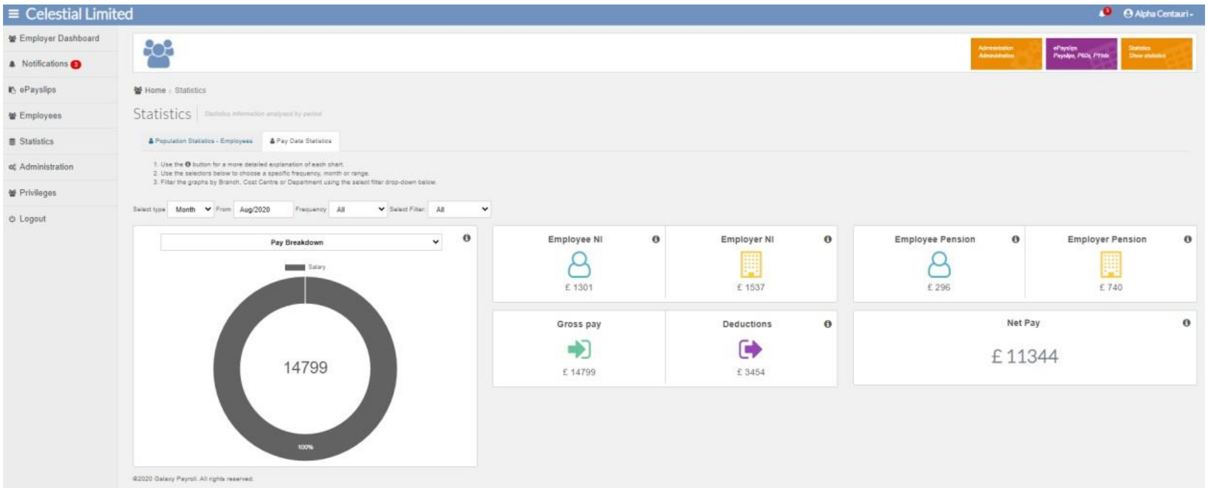
Statistics – Population Statistics – Employees

Please refer to the Employer Statistics Guide located on the Statistics page for further information on the charts available. The user guide is also available on the Customer support website.



Statistics – Pay Data Statistics

Please refer to the Employer Statistics Guide located on the Statistics page for further information on the charts available. The user guide is also available on the Customer support website.



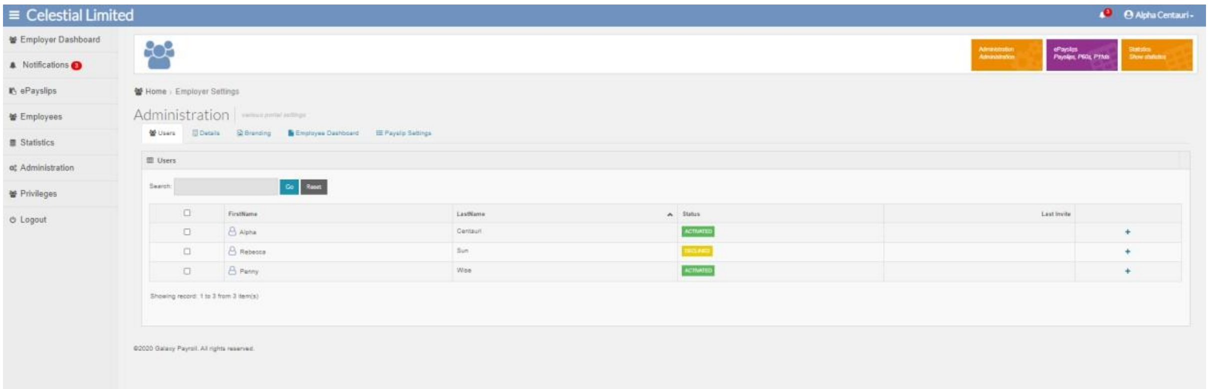
Administration

The Administration page provides access to the following Employer administration functions via the 'tabs':

- **Users tab** - A list of all the Employer users and their Portal status. These users can be sent reset password or username emails as required. Whilst the deactivate action can be seen here it has no effect as only Bureau users can deactivate Employer users
- **Details tab** - The Employer address details as held in the Payroll application, the default Employer contact, and the Bureau contact address information
- **Branding tab** – This is where you can set the Portal colour scheme for you and your Employees and add a company Logo as required
- **Employee Dashboard tab** – This is where you can customise your Employees dashboards including creating a broadcast for all employees and setting up useful links
- **Payslip & CIS Settings** – From here you can define which items to display on the online payslip view including a payslip company logo if required. You can define what items to display on a CIS Statement

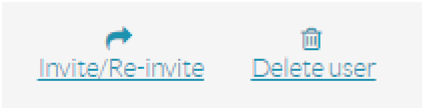
Administration-Users

This tab shows the Employer-level Users connected to the Portal together with their Portal Status.



Click anywhere on an Employer user entry, or on the **'+'** button to see the actions available for the individual user – The actions available will vary depending upon the user status:

For Employer users with a status of Invited, Activating, the actions available are as follows:



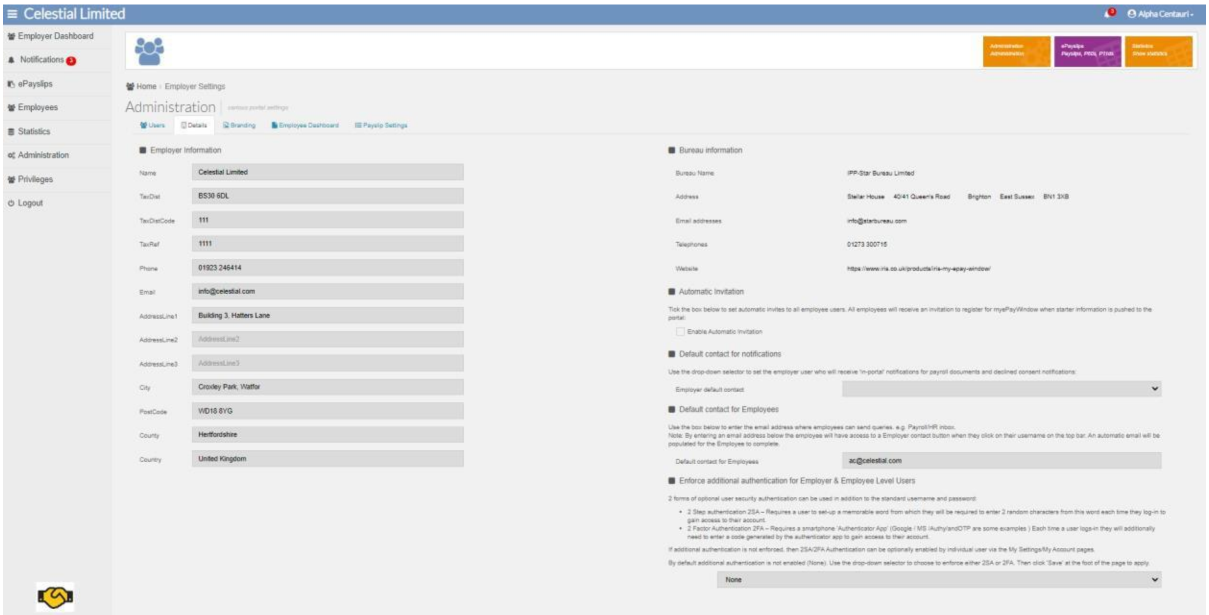
For Employer users with a status of Activated, Deactivated, the actions available are as follows:

- **Deactivate - Reactivate** – To deny/reinstate access to an Employer user
- **Reset/Unlock** – Send a Password/Username reset email to the Employer user & view the status of the user & the last logged in date and time. If a user is locked out it will show here.
- **Delete – Delete user**, this is only possible if the User status is 'Unregistered' or 'Invited'

If an Employer user leaves and they have an activated Portal user account, the user cannot be deleted but their Portal account should be deactivated.

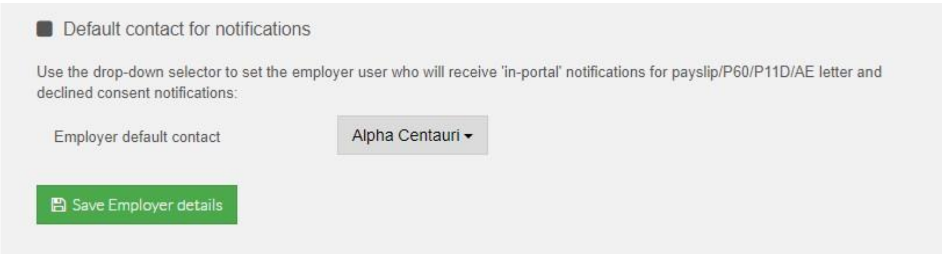
If you attempt to deactivate the Default User, you will receive the following error message.

Administration-Details

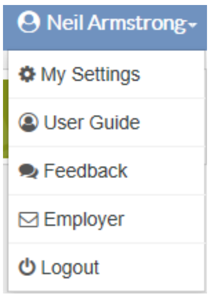


This tab shows:

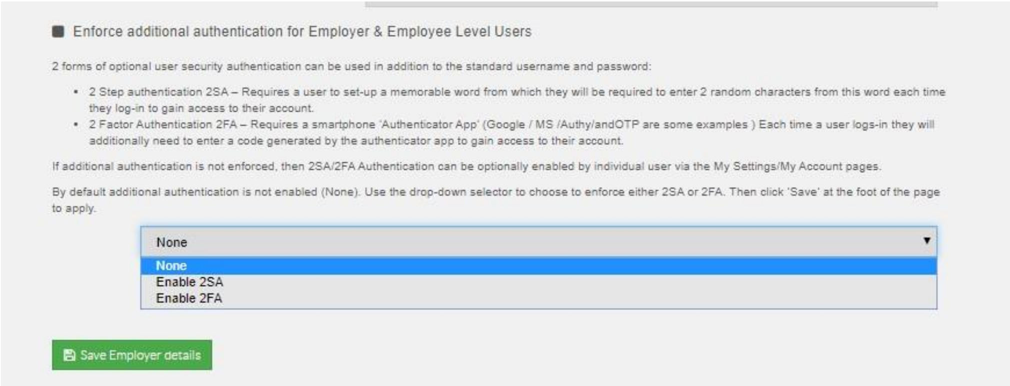
- **Employer Information** - your (the Employer) company address and contact information as held in the **Payroll** application.
- **Bureau information** – Your bureau address details as held in the Payroll application
- **Automatic Invitation** – Allows you to set automatic invitations for all employees
- **Default contact for notifications** – Allows you to set the default contact to receive Payslip/P60/P45 notifications from Payroll Department. Click in the drop-down selector and then **Save Employer details** (see below)



- **Default contact for Employees** – Allows you to set the default contact (email) where employees can send queries e.g. payroll/HR inbox. By entering an email address here, the employee will have access to an Employer contact button when they click on their username on the top bar

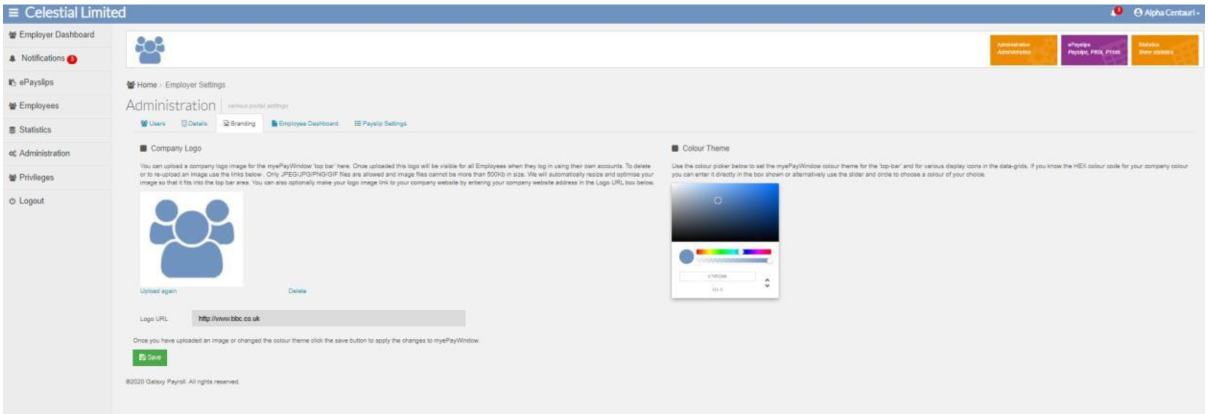


- **Enforce additional authentication for Employer & Employee Level Users** – Provides additional security for your Employer & Employee users. The user can choose to enable 2SA/2FA via My Settings/My account pages. Tick Enable 2SA/2FA and then **Save Employer details** (see below) for more information see Additional Authentication



Administration - Branding

From this page the colour of the Portal's 'Top-bar' and the icons in the Notifications, Documents, and Employee listings can be set to match with your company branding. A Logo and a Logo URL can also be added. The Logo URL will allow a website link to be set so that when a user clicks on the Logo it will take them to the company's website (or another site of your choice).



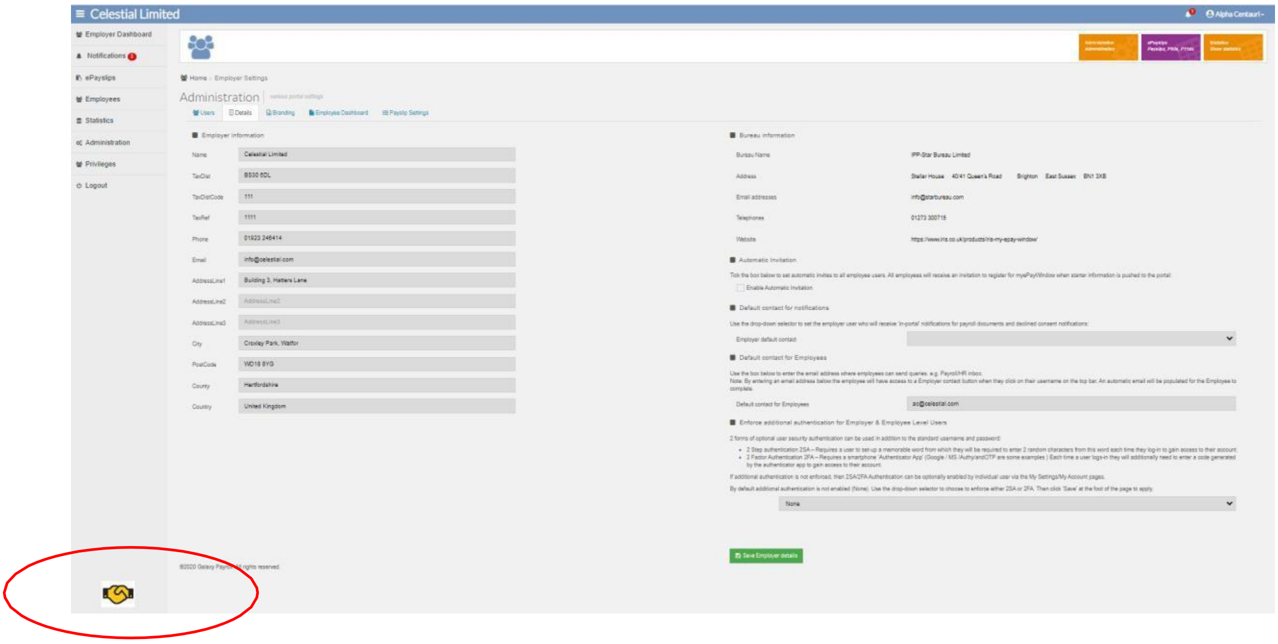
Company Logo – drag or click in the blue area to upload a logo image to the Portal, images cannot be larger than 500kb in size and will automatically be resized. Click upload again to replace an existing logo image.

Colour theme – use the slider or colour pane or enter a HEX / RGB / HSL colour code.
Note: Depending on the web browser you are using; you may be able to add a browser tool that will allow you to find out the colour code used on an existing website page element. If you do this, you will be able to match exactly the Portal with colour of your own website.

Logo URL - Type a URL here that can be followed when users click your logo image.

Click **Save**, to apply the Logo to the Portal and your chosen colour setting.

Note: If the Payroll Department has selected the option to show their Payroll Department Logo on the Employers' left menu, the logo will show as below.

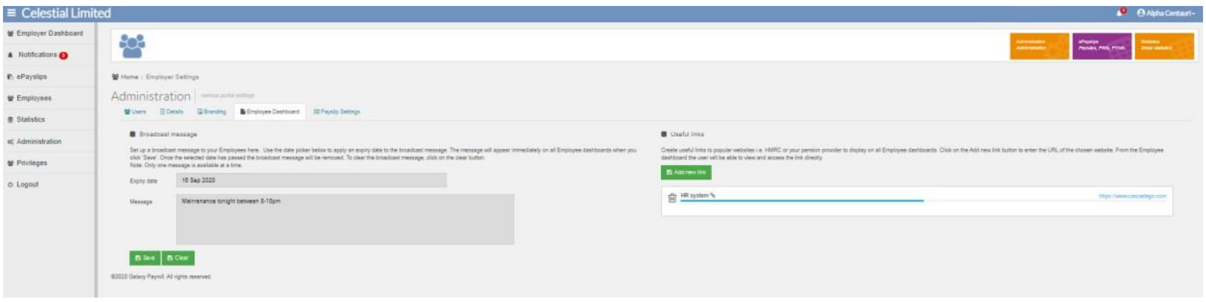


Administration-Employee Dashboard – Broadcast Message

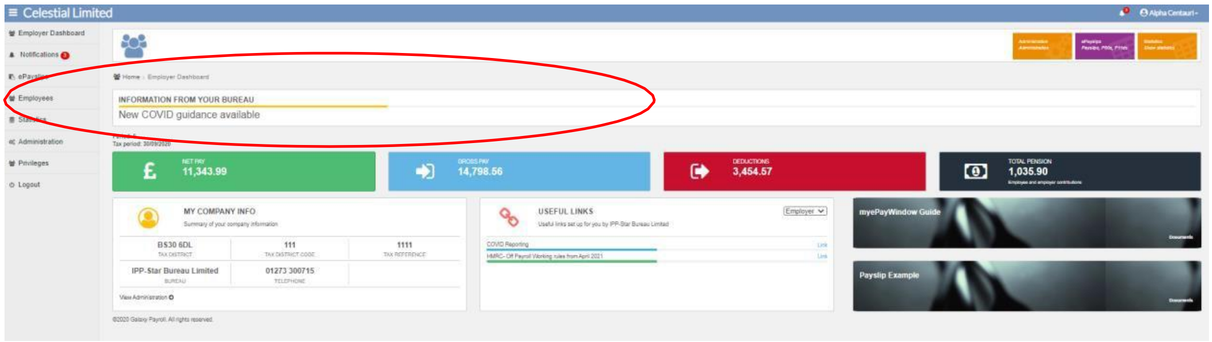
From this page a Broadcast Message & Useful links can be created to show on the employee dashboard.

Navigate to **Administration/Employer Dashboard**.

Use the date picker below to apply an expiry date to the broadcast message. Enter the message text (a maximum of 500 characters). Click save. This broadcast message will show immediately on all your 'Employee' dashboards. Only one message can be displayed at a time. A message remains on display until it is replaced, removed or the date expires. If you wish to remove the message you will need to click on clear and then 'save' and the message will be removed from the Employee dashboard.



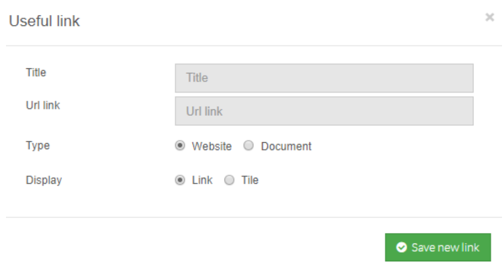
The broadcast message will display as below on the Employee Dashboard:-



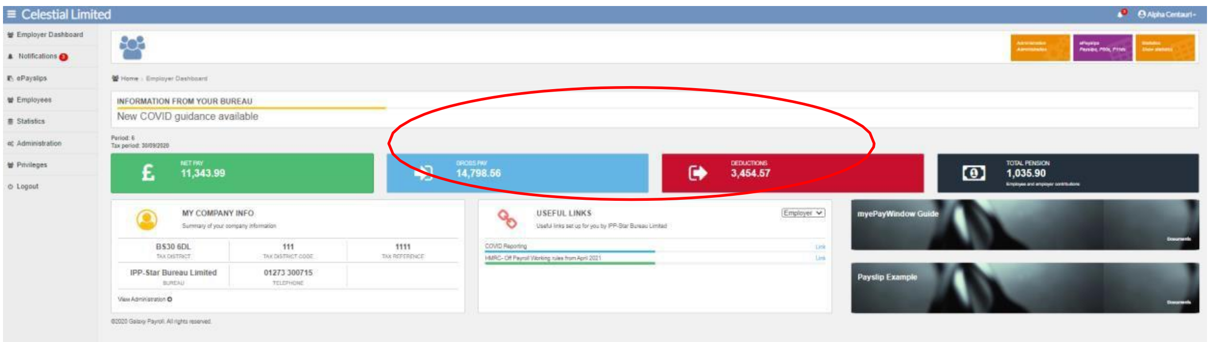
Administration - Employee Dashboard – Useful Links

Navigate to **Administration/Employee Dashboard.** Click on the add new link button

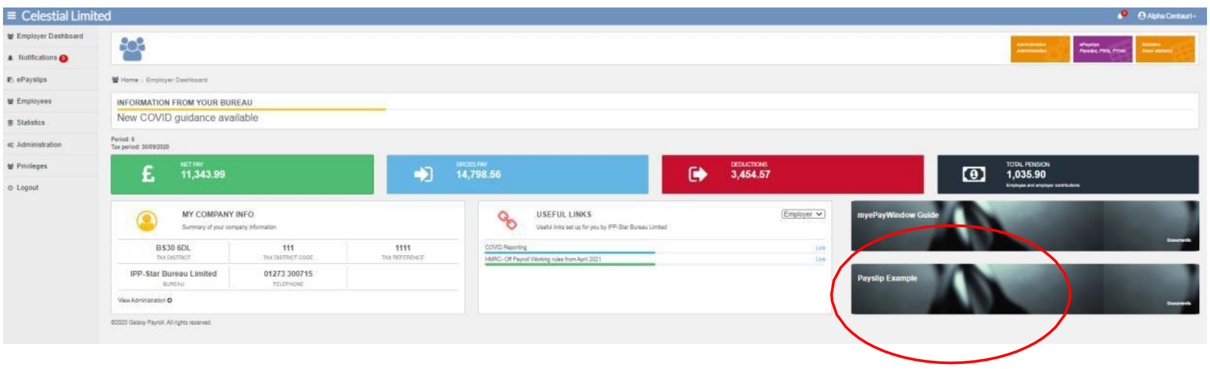
1. Enter the **Title** of the useful link e.g. HMRC
2. Enter the **Url link** of the website or Document
3. Choose whether you would like the website shown as a link or a tile on the dashboard
4. Click **Save new link**



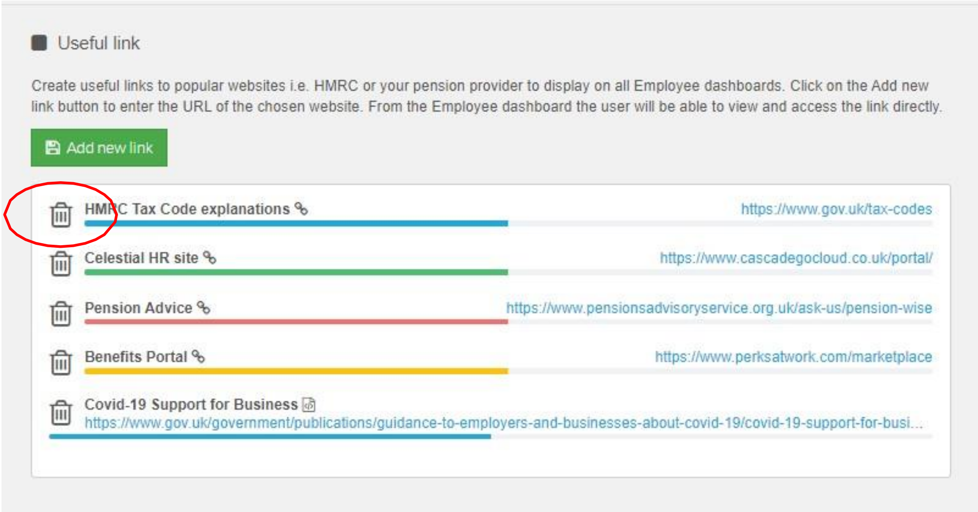
The useful link has been created on the Employee dashboard. You can create as many useful links as you like, however we recommend that create 5-8 Useful links and two tiles on the dashboard.



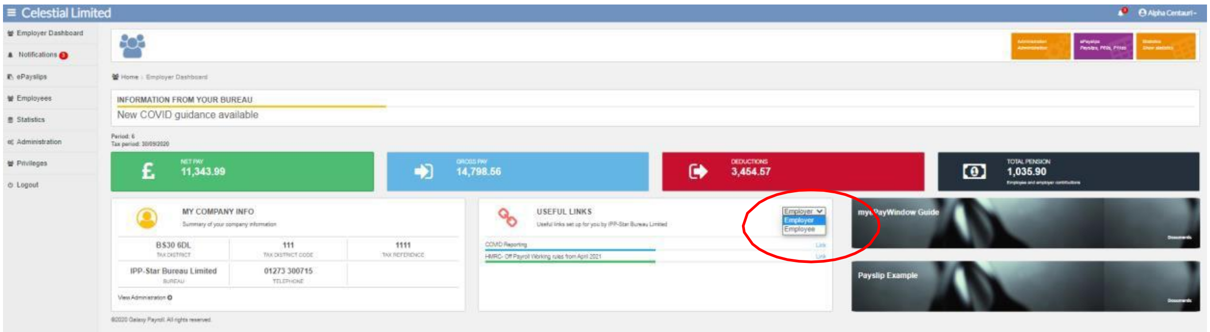
Below shows an example of a useful link as a tile.



To delete a useful link, navigate to **Administration/Employee Dashboard** and click on the bin icon. This will remove the link from the Employee dashboard.



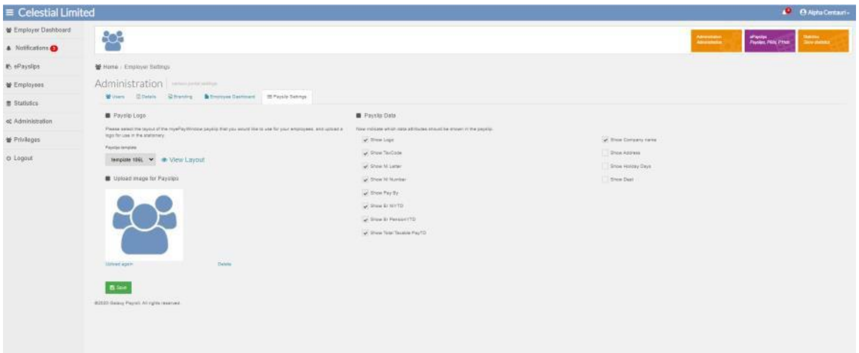
From the **Employer dashboard** you can switch the view from your Employer Useful links (set up by the Payroll Department) and the view from the Employee useful links (set up by the employer). Use the dropdown box to choose the view.



Administration - Payslip Settings

Employer users can set the company logo to appear on the online payslip views and those details to include on the payslip. Click **Save** to apply the changes.

- **Payslip Template** - This drop-down allows different online Payslip templates to be used. Currently, there are 2 templates available. Template 1 is the default if this is not set. Click on the View Layout button to see a preview of the templates
- **Payslip data** - Online Payslip settings, the most frequently used options for the templates are defaulted to display for convenience. Add/remove check marks as required
- **Upload images** - Click in the logo box to upload an initial Logo to appear on Payslips views – use 'Upload again' to replace with a different logo



Employer Level Privileges

The Privileges page provides access to the following Employer functions:

- **Employee Groups tab** - Create New Employee Group(s) and add Employees based on the Analysis group in Payroll (Branch, Cost Centre or Department)
- **Roles-privileges tab** - set-up new access Role(s) with appropriate privileges
- **Groups-Roles-Users tab** - add the required Role(s) to each Employee Group(s) and add the Employer Users to each Role (remove them from the Full Access Role as required)

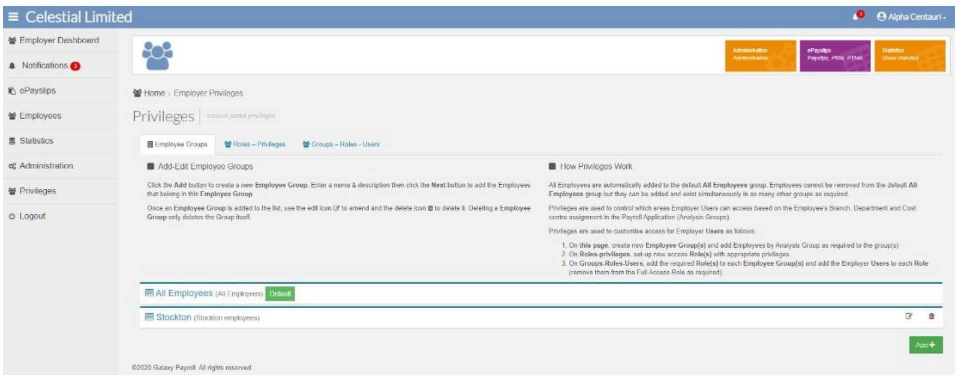
Employer level privileges can be set-up either by an Employer level user or alternatively, a Bureau level user, with the appropriate permissions, can do this on the Employer's behalf. Employer level privileges do not need to be used but any new Employer users added from now onwards will need to be assigned required access permissions (see below).

Existing Employer Users

Existing Employer Users are automatically added to the default Full Access Role with full access privileges to all Employees.

New Employer Users

When you add a new Employer user, they will have no access until they are added to Roles in the various Employee Groups.



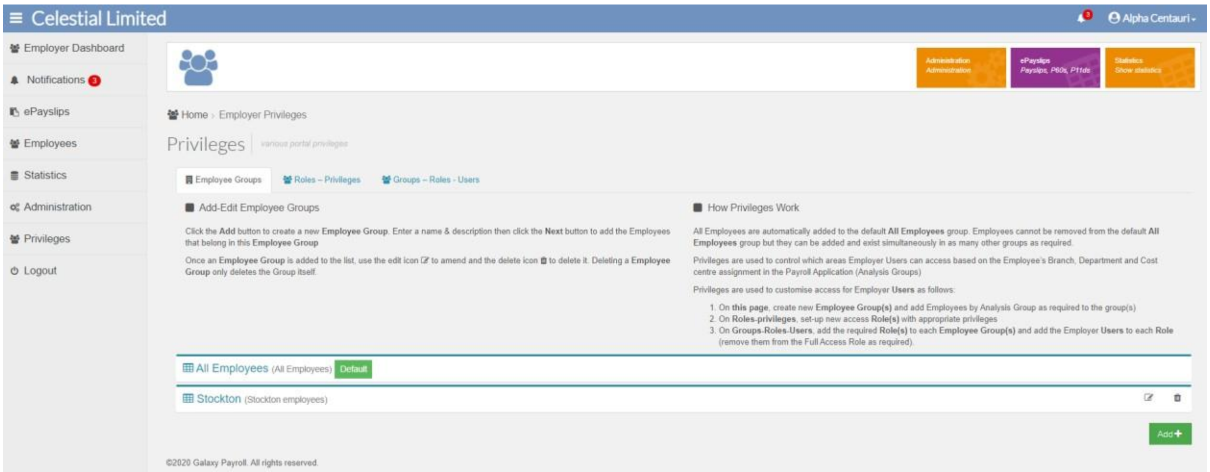
Note: Depending on the Role an Employer User belongs to, access to the Privileges page may be restricted or unavailable.

You do not need to use Employer Privileges but please read this section carefully to ensure how Privileges impact myePayWindow operation.

Step 1 - Create a new Employee Group (s)

From the Privileges - Employee Groups page, you can create a logical Employee group and add Employees to it.

Note: All myePayWindow Employees are automatically added to the default All Employees group. Employees cannot be removed from the default All Employees group, but they can be added and exist simultaneously in as many other groups as required.



Click the Add button at the bottom of the Employee Group listing to Add a **Group** (to edit or delete a Group use the Icons per Group in the listing).

You must enter an Employee Group Name (100 Characters) and provide a description (500 Characters).

Add Employees (by analysis group) to the Employee Group(s)

Use the alpha/numeric filters or use the search box, then click the Branch, Cost Centre or Department name(s) (to highlight in green) to add to the Employee group. You can Click the '**Yes**' button in the select All Data section to add All Employees to the group.

Note: When you choose 'Select All Data' a group entry called 'All Data' is automatically included in the Employee Members section and not individual Employees names.

To remove individual Employees from the Group, click the waste-bin Icon in the Employee Members section of the screen.

When you have chosen all the Employees for this Group, Click Save to apply.

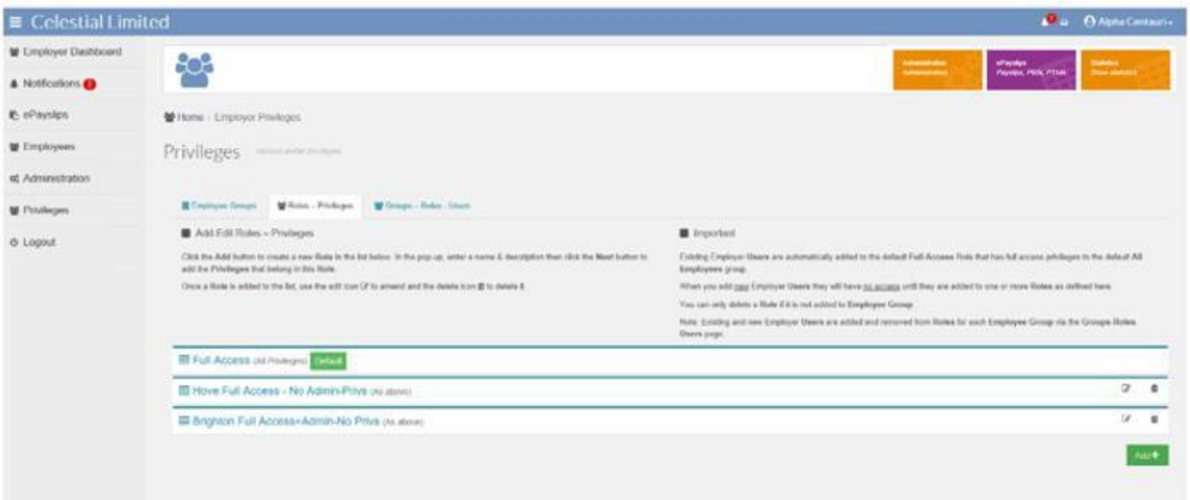
Step 2 Create Roles – Privileges

On the Privileges - Role–privileges page create a **Role** and add **Privileges** to it:

Note: Existing Employer Users are automatically added to the default Full Access Role that has full access privileges to the default All Employees group.

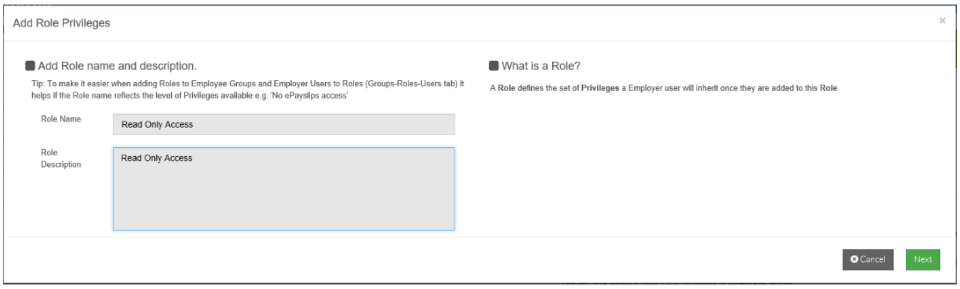
When you add new Employer Users, they will have no access until they are added to one or more Roles as defined here.

You can only delete a Role if it is not added to an Employee Group.



Click the **Add** button at the bottom of the Roles listing to Add a **Role** (to edit or delete a role use the Icons per Role in the listing).

You must enter a Role Name (100 Characters) and provide a description (500 Characters).



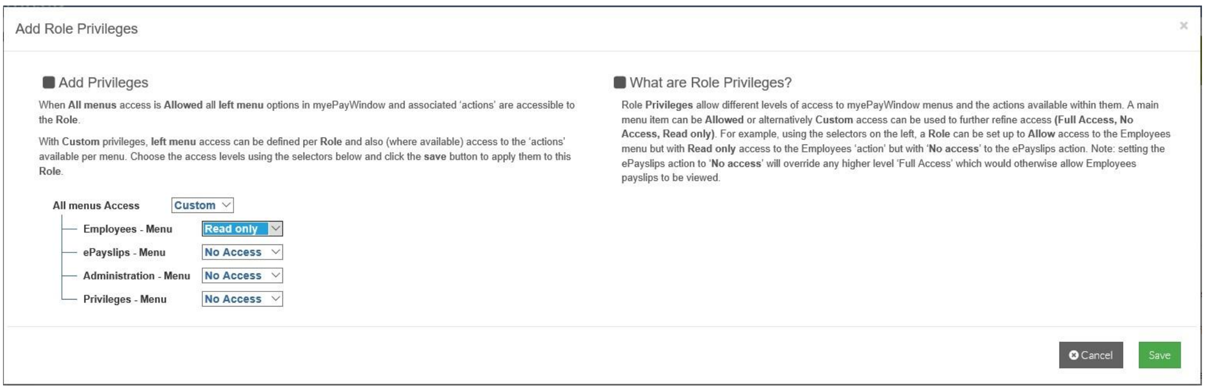
Click next to Add Role Privileges…

Add Role Privileges

Role Privileges allow different levels of access to myePayWindow menus and the actions available within them. **All** main menu item can be **Allowed,** or alternatively **Custom** access can be used to refine access to the individual menus as required **(Full Access, No Access, Read only)**. For example, using the selectors on the left below, this **Role** can be set up with **Read only** access to the Employees menu, '**No access**es to the ePayslips, Administration and Privileges menu.

Note: setting the ePayslips menu to '**No access**' will override any higher level '**Full Access**' which would otherwise allow Employees payslips to be viewed. Therefore, in this example, a user in this role will have no access to the ePayslips left menu, will be able to see a list of Employees but will be unable to invite/re invite or deactivate/activate Employee accounts. Further, the ePayslips 'action' for an Employee will be disabled.

Choose the access levels using the selectors below, click save to apply.



Step 3 – Add Roles and users to Employee Groups

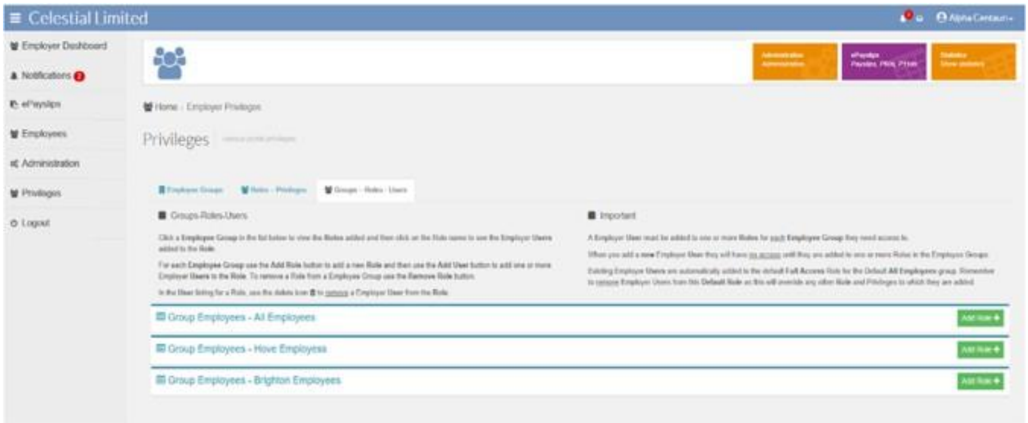
The final step is to add **Roles** to **Employee Groups** and Employer **Users** to the Roles as required.

Note: An Employer User must be added to one or more Roles in each Employee Group they need access to.

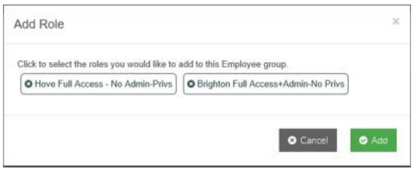
When you add a new Employer User, they will have no access until they are added to one or more Roles in the Employee Groups.

Existing Employer Users are automatically added to the default Full Access Role for the Default All Employees group. Remember to remove Employer Users from this Default Role as this will override any other Role and Privileges to which they are added.

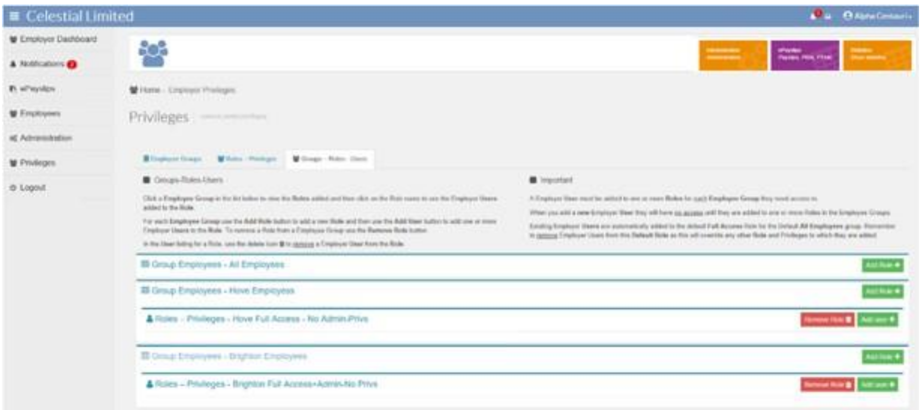
For the required Employee Group in the listing click the **Add Role** button.



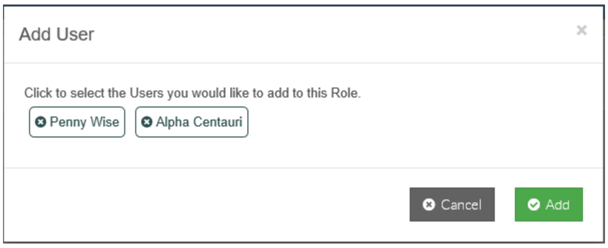
Select the roles you would like to add to the Employee Group. Click on **Add**.



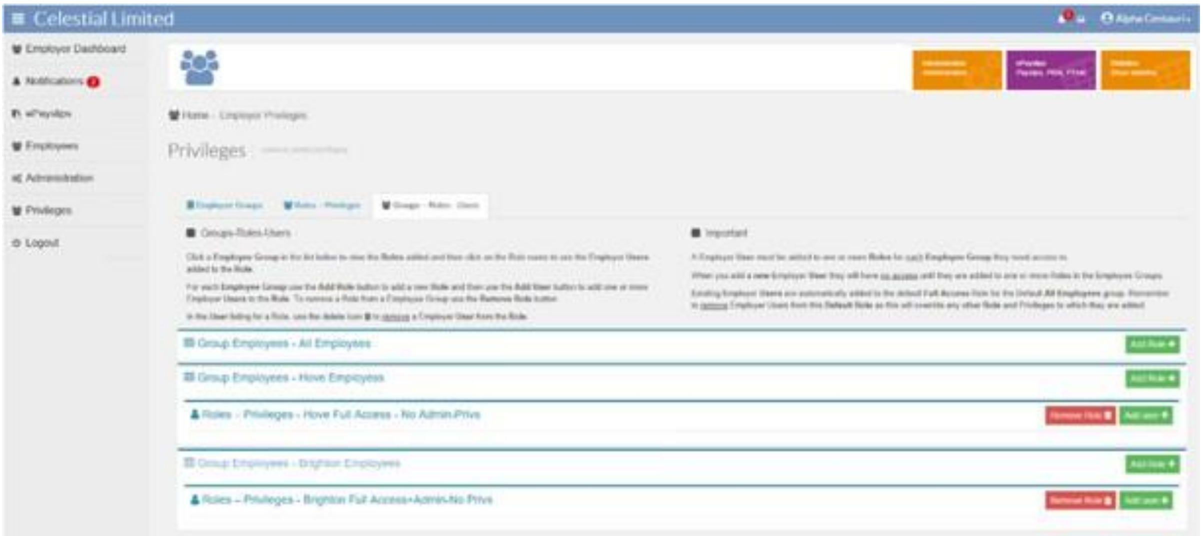
Click on the **Add User** button or the **Remove Role** Button to delete the Role.



Select the users you would like to add to the Role. Click on **Add**.



Use the waste-bin icon to delete users from the role.



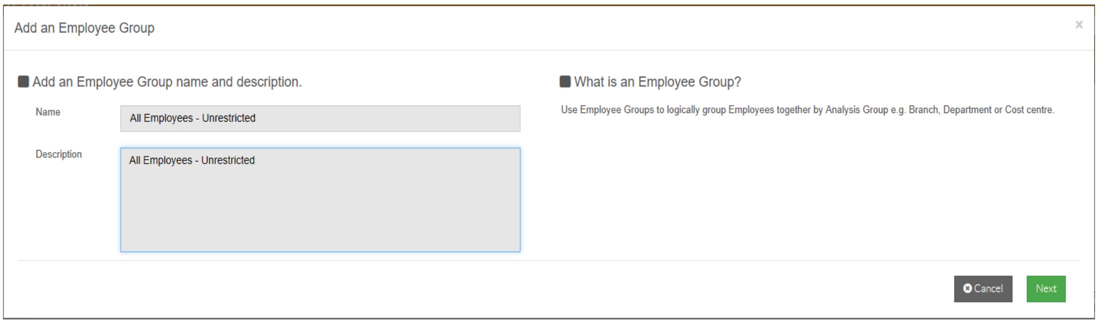
Privileges - Best practice

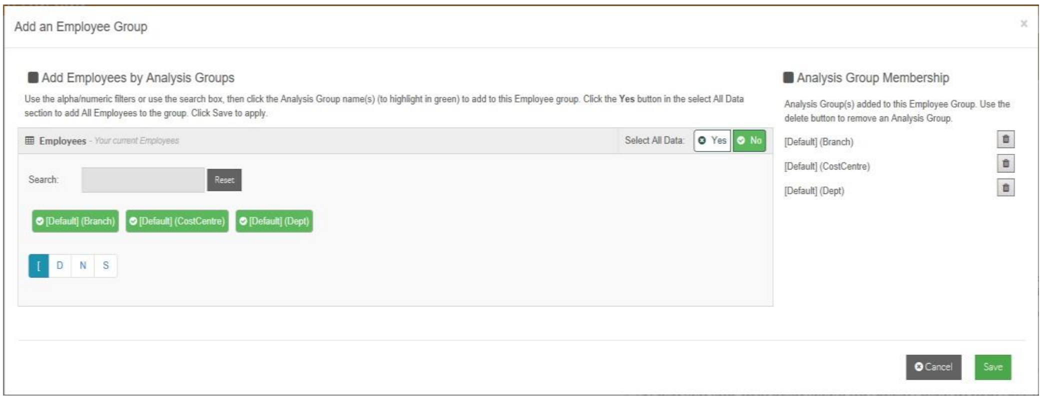
Once you start using Privileges to restrict access to one or more Employee Groups it is good practice to:

1. Create an alternative 'All Employees - Unrestricted' Employee Group and add all Employees to this by Analysis Group (not as 'All Data)
2. Create an alternative 'Employer Full Access' Role without Administration and Privileges access
3. Add the 'Employer Full Access' Role to the 'All Employees - Unrestricted' Employee Group and add the majority of Employer Users to this role (see 4 below)
4. Leave your Employer Administrator in the default Full access role and default 'All Employees Group' and remove all other Employer Users – so your 'Super' or 'Admin' user retains Full access to everything

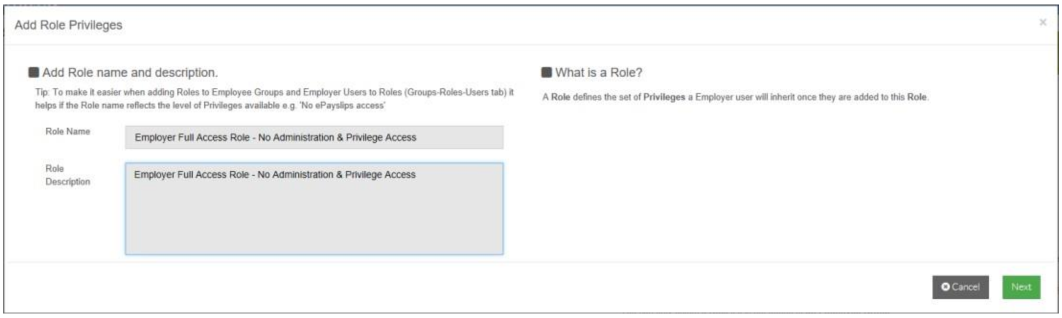
Step-by-step:

Step 1 – Add 'All Employees – Unrestricted' Employee Group

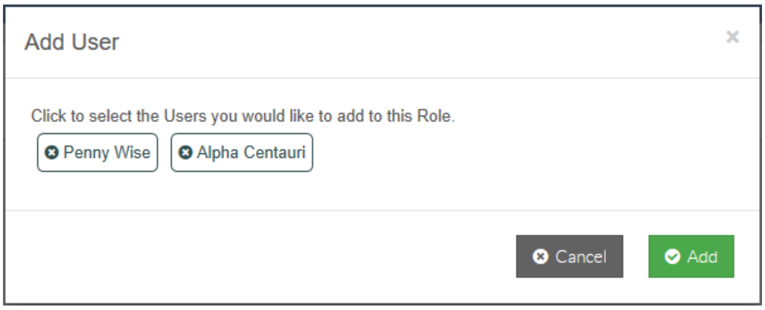




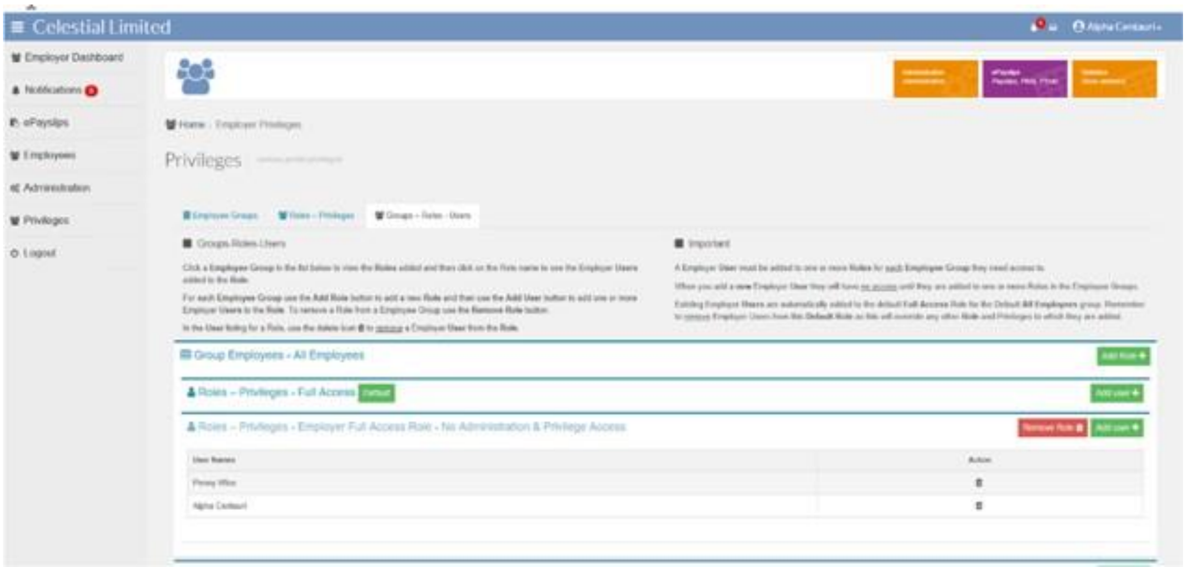
Step 2 – Add 'Employer Full Access' Role-Privilege



Step 3 – Add Employer 'Full Access Role' to 'All Employees Unrestricted' and Add Employer Users



Step 4 – Remove all other Employer Users from Default All Employees Group – leave 'Super' User in Default Full Access Role

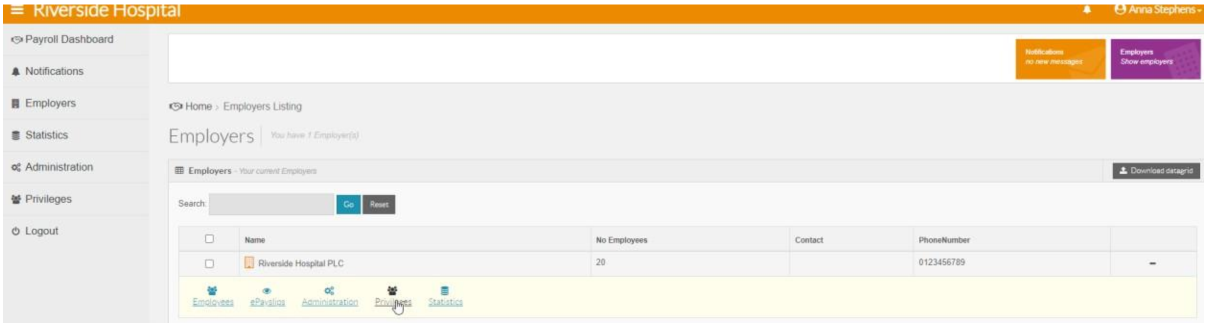


Note: Please remember any new Employer Users will have no privileges assigned by default so you will need to add them to a Role for them to have access to any Employees.

Employer Privileges set from Payroll Department Level

Employer Privileges can be set through the Payroll Department user.

Click on **Employers**, select the Employer and click on **Privileges**.



The Employer Privileges pages will be accessible. Follow steps 1-3 as above.

My Settings

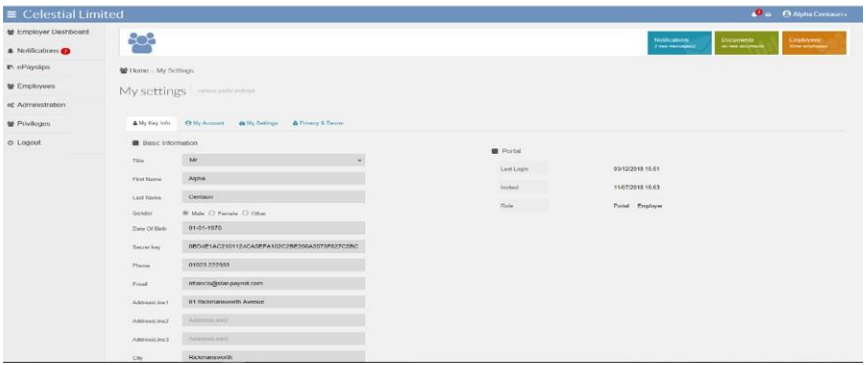
The My Settings page contains various tabs concerning your individual Portal user settings and details. These features will be extended in future releases:

- My Key Info
- My Account
- My Settings
- Privacy & Terms

My Settings - My Key Info

- My Key Info – Your (The Employer) details as held in the Payroll application and your last Portal login date, the date you were invited to join the Portal and your Portal 'role'

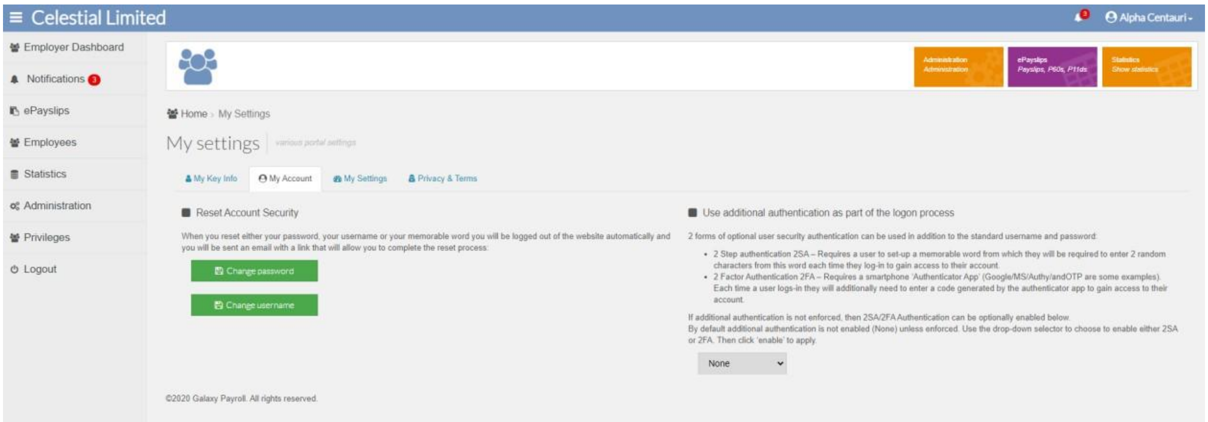
Note: You are unable to edit these fields. Any Data changes required here must be made in Payroll and updated from there via Data/myePaywindow.



My Settings - My Account

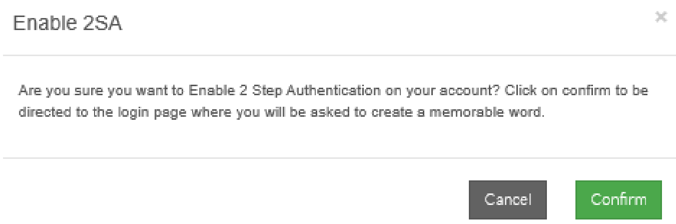
- Change password – On clicking this you will be logged out immediately and an email will be sent to your registered portal email address (the address held by your Payroll department and to which your Portal invitation was sent). The email will contain a link to reset your password. You will be required to verify your identity so have a previous payslip to hand
- Change username – On clicking this you will be asked to confirm your registered portal email address (the address held by your Payroll department and to which your Portal invitation was sent) you will then be logged out and an email will be sent to this registered portal email address. The email will contain a link to reset your username. You will be required to verify your identity so have your verification details to hand
- Enable 2-Step or 2-Factor Authentication on your account – this provides additional security for you when logging into myePayWindow. If 2SA/2FA is enforced at a company level, you will not be able to edit the settings here

Click **Change password or Change username**, to start the reset process.

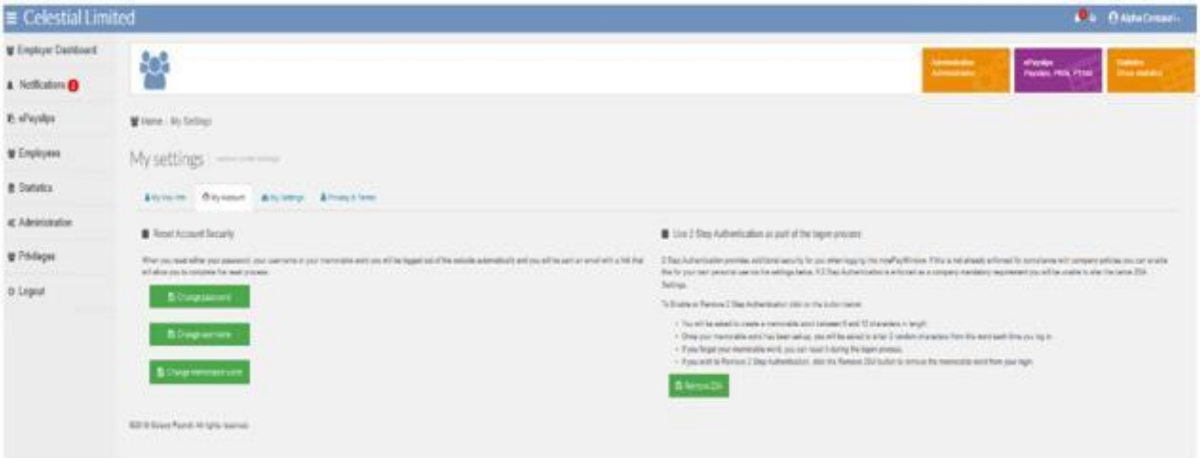


Enable 2 Step Authentication

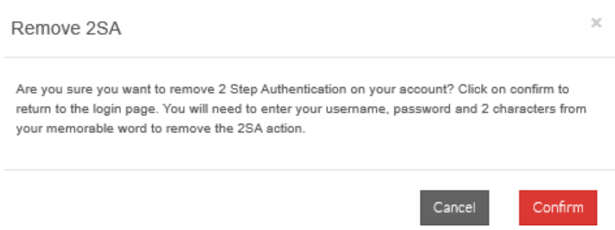
2 Step authentication 2SA – Requires a user to set-up a memorable word from which they will be required to enter 2 random characters from this word each time they log-in to gain access to their account.



If you have 2SA Enabled, you will see a **Change Memorable word** button, click on this to change your memorable word.



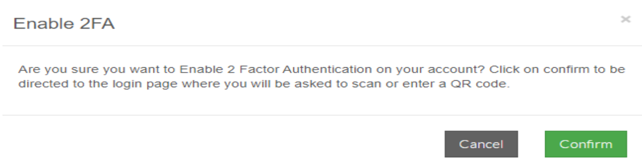
Click on the **Remove 2SA** button to remove 2SA, you will no longer be prompted for 2 random words from your memorable word when you log in.



Note: If 2SA is enforced at a company level you will be unable to change the settings at a personal level here.

Enable 2 Factor Authentication

2 Factor Authentication 2FA – Requires a smartphone 'Authenticator App' (Google /MS /Authy/andOTP are some examples) 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.



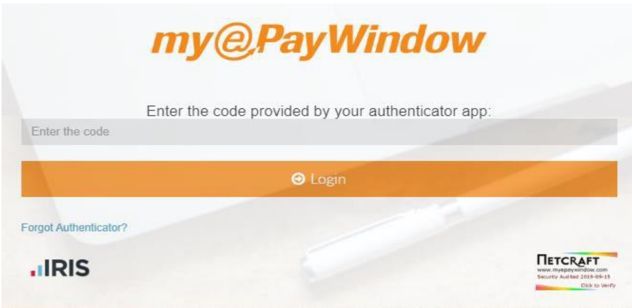
Users will be next asked to enter their username & password, after which they will be asked to scan the QR code or add manually using the authenticator app

Ensure you have your “authenticator app” installed on your smartphone.

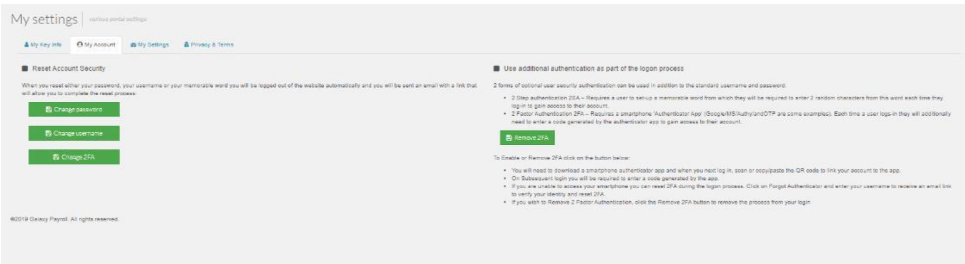
Note: If you are using your smartphone for first time authentication, either copy and paste the long code or hold your finger down on the QR code. You will be asked if you wish to open in “Authenticator”. Your chosen authenticator app will open, and you will be asked to add the token.

The app will provide you with a code which you will need to enter to access your account. Enter the code provided and you will access your account.

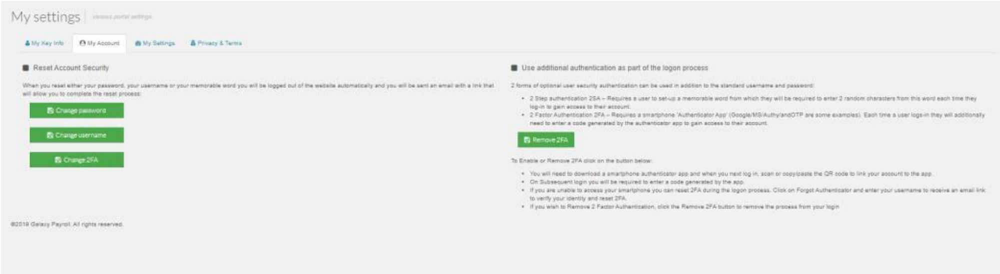
Enter the code from the authenticator app



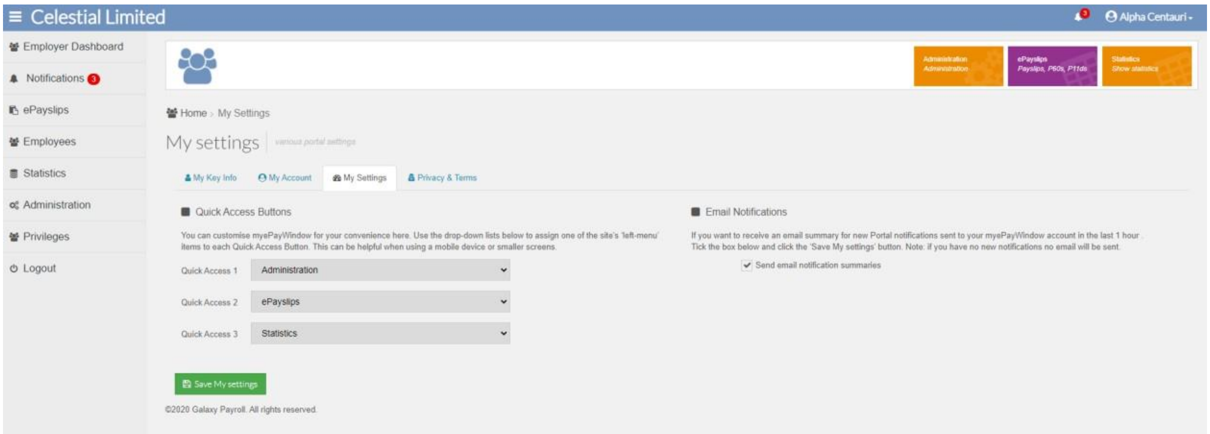
If you have 2FA Enabled, you will see a **Change 2FA** button, click on this to reset 2FA



Click on the **Remove 2FA** button to remove 2FA, you will no longer be prompted for a code from the authenticator app when you log in.



My Settings - My Settings

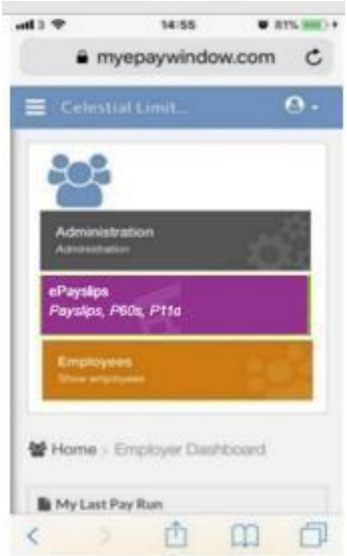


The **My Settings** tab allows you to personalise the Portal as follows:

- Quick Access Buttons – for easier user access via a smartphone or small tablet

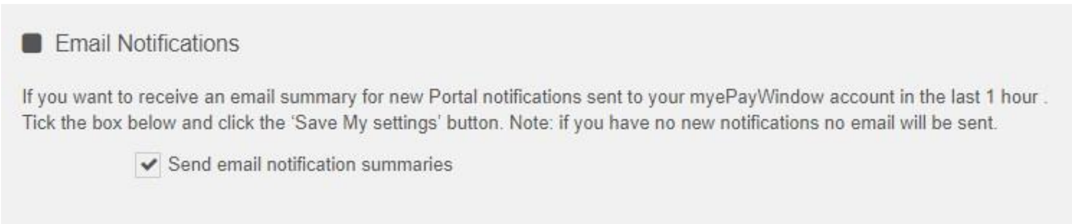
Use the drop-down selectors to assign a left-menu item to **Quick access button 1, 2, 3** click **Save Dashboard** to save changes and apply.

Note: The Quick access buttons are for convenience when accessing the Portal on a mobile device. (You can set your favourite menu item to the Quick access button (3) that will be closest to your thumb on a smartphone! – see screenshot over the page)

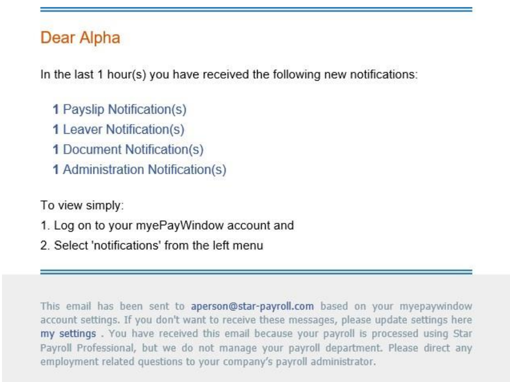


Email Notifications – you will automatically receive email notification summary to your registered Portal account email address.

Use this tick box to opt to receive an an email summary for new Notifications. An email summary will be sent to your registered account email addrees (see My Key Info) <u>if you have new, unread notifications in the last 1 hour.</u>



Example summary email Notification:



Dear Alpha

In the last 1 hour(s) you have received the following new notifications:

1 Payslip Notification(s)
1 Leaver Notification(s)
1 Document Notification(s)
1 Administration Notification(s)

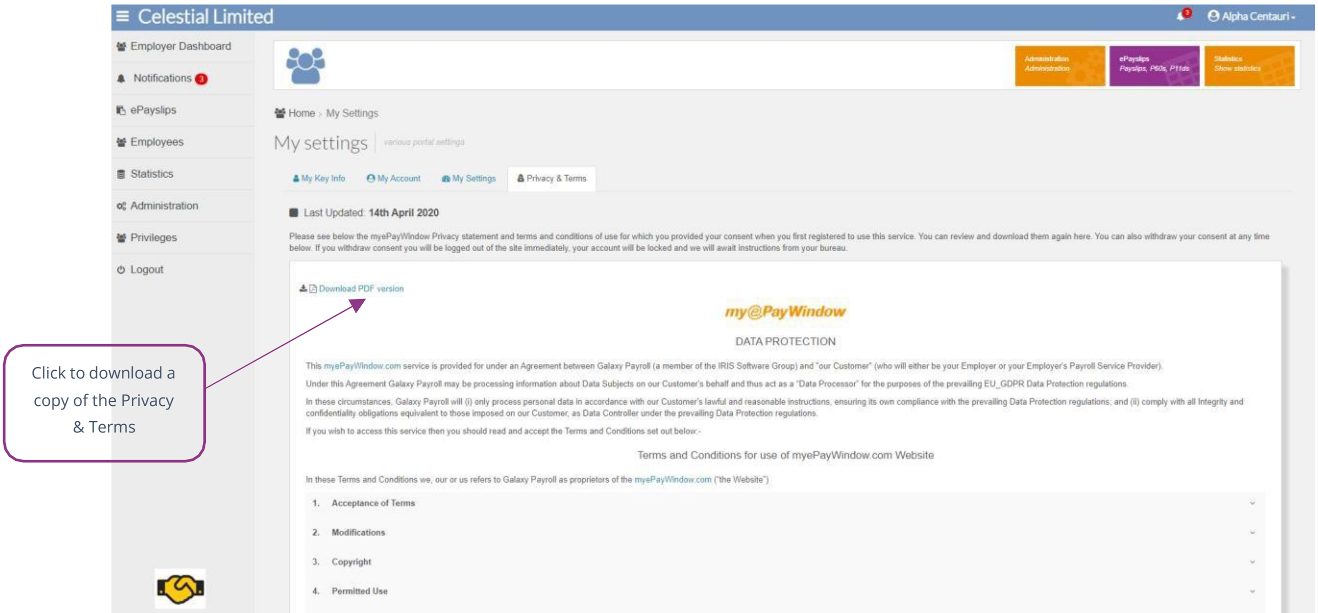
To view simply:
1. Log on to your myePayWindow account and
2. Select 'notifications' from the left menu

This email has been sent to aperson@star-payroll.com based on your myepaywindow account settings. If you don't want to receive these messages, please update settings here my settings . You have received this email because your payroll is processed using Star Payroll Professional, but we do not manage your payroll department. Please direct any employment related questions to your company's payroll administrator.

My Settings - Privacy & Terms

- Privacy and Terms – View/download myePayWindow terms and privacy and access Consent option

All Portal users must provide their consent to use the site upon registration. Once you have set up your account you can scroll this window to access a 'Consent withdrawal' button and click '**I do not agree**' button if you wish to discontinue using the site. This action will deactivate your account immediately and your Portal status will be set to Declined. A notification will be sent to other employer users and your Bureau to confirm this fact.



Any user that declines consent will need to be re-invited if they subsequently decide they want to use the Portal.

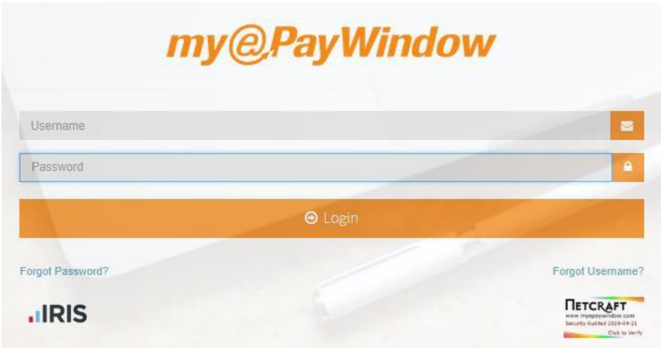
Re-setting Usernames and Passwords

Re-setting usernames and passwords is a fully automated process (i.e. they do not require Payroll Department User or Employer user intervention although such resets can be initiated by Payroll Department or Employer users if required). The term ‘user’ applies to any Portal user i.e. Employee, Employer or Payroll Department user. Any of these ‘users’ can initiate a reset directly from the Portal login page or once logged in to the portal via My Settings/ My Account options. Resetting Username and Passwords require the user to have access to their registered portal email account.

Automated password reset

Step 1 – From Portal login page

From the login page the user can click on **Forgot Password?** to start the reset process.



Step 2 – Request link

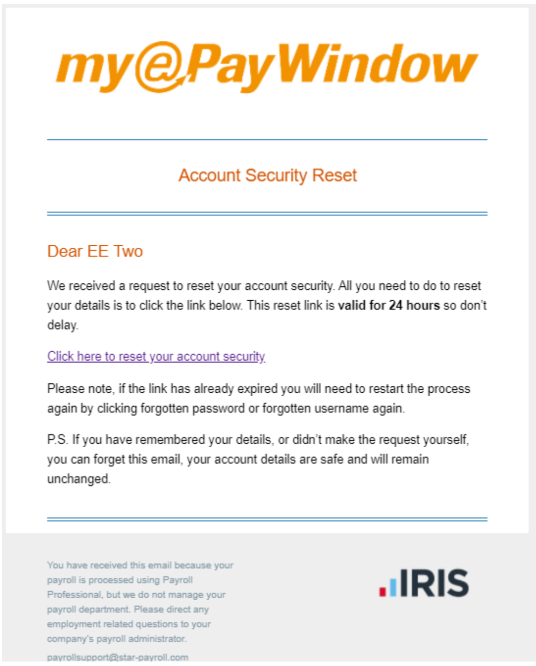
On clicking Forgot Password a new screen will appear requesting the user to enter the account Username. Enter the username and click **Submit**

Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

The user will receive an email (to their payroll registered email address) with a link to complete the password reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.



Step 5 – Verify identity

All fields must be entered correctly to complete the identity verification and to continue with the reset.

Note: The last field in verify identity screen for an Employer User will be the secret key agreed with Payroll Department User (Not the National Insurance Number, as this is required for Employee Users)

Step 5a – Verification failure

After 5 failed attempts at identity verification an error message is displayed, and the process will need to be restarted. This message will also be displayed if the reset link has expired.

Step 6 – Enter new password

Once the user has verified identity correctly, they will be able to set a new password. The two password entry fields must match, there is no limit on the number of attempts.

Passwords will be validated and need to meet the following complexity rules.

- 1 upper case character
- 1 lower case character
- 1 special character
- 1 numeric character
- Contain between 8-20 characters

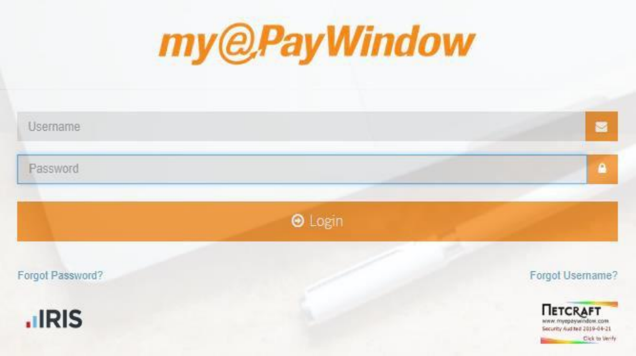
Step 7- Change Password confirmation

On clicking **Reset** the password change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login**

Automated username reset

Step 1 – From login

From the login page the user can click on **Forgot Username?** to start the reset process.



Step 2 – Request link

On clicking Forgot Username a new screen will appear requesting the user to enter the email address associated with account Username. Enter the email address and click **Submit.**

Step 2a – Email address used with multiple Employers

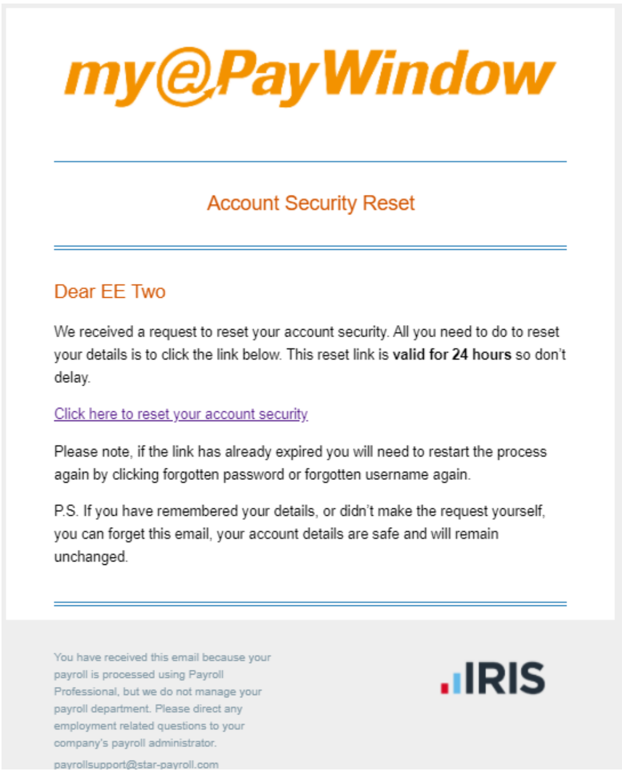
If an email address is used for more than one Employer, for example, when an employee works for two employers and uses the same email address for both, a warning message will be displayed. In such situations the Employee (or Employer or Payroll Department user) will be asked to contact the Employer directly for the employment concerned so that an email link to reset can be sent to them (this can be done by the Employer or Payroll Department from the Portal).

Step 3 – Confirmation of reset

Once the email has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the username reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.



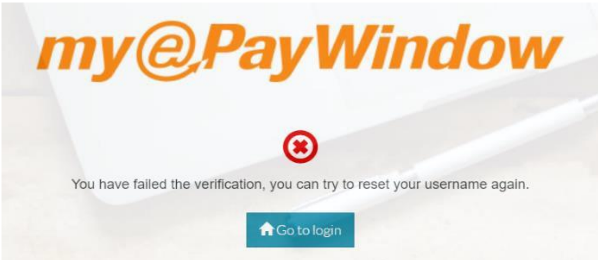
Step 5 – Verify identity

All fields must be completed correctly to verify identity and continue with the reset.

Note: The last field for an Employer User in the verify identity screen will be the 'secret key' agreed, with the Payroll Department (Not the National Insurance Number, as this is required for Employee Users)

Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.



Step 6 – Enter new username

When the user has verified identity correctly, they will be presented with a screen to enter a new username. The Username must be at least six characters in length and Users are prompted that an email address can be used as this may be more memorable (note: when an email address is used as a username it may not necessarily be the same as the registered Payroll email address for the user).

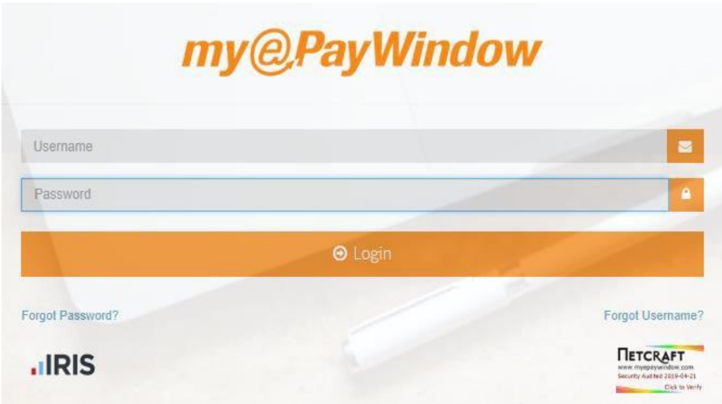
Step 7- Change Username confirmation

On clicking **Reset** the Username change will be confirmed as successful and the user can continue to the login screen by clicking **Go to login.**

Automated Memorable Word reset

Step 1 – From login page

Complete the Username & Password as normal.



On the second page click on **Forgot Memorable Word?** to start the reset process.

Step 2 – Request link

On clicking **Forgot Memorable word?** a new screen will appear requesting the user to enter the username associated with the account. Enter the username and click **Submit.**

Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

The user will receive an email (to the specified payroll registered email address) with a link to complete the memorable word reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.

Step 5 – Verify identity

All fields must be completed correctly to verify identity and continue with the reset.

Step 5a – Verification failure

After 5 failed attempts at verifying identity the user will get a warning page and the process will need to be restarted. This page will also be displayed if the reset link time has expired.

Step 6 – Enter new memorable word

When the user has verified identity correctly, they will be presented with a screen to enter a new memorable word. The memorable word must be at least 6 – 12 characters in length.

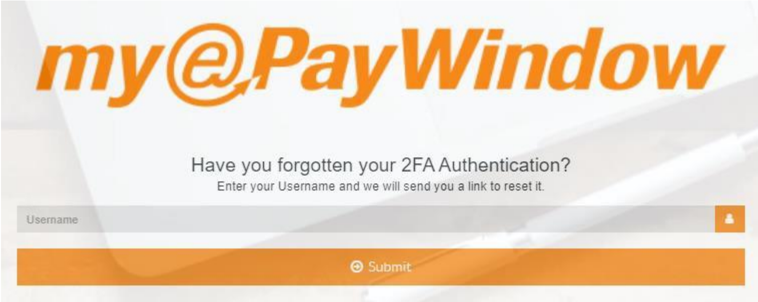
Automated 2FA reset

Step 1 – From login page

Enter username and password

Step 2 – Request link

On clicking Forgot Authenticator? a new screen will appear requesting the user to enter the username associated with the account. Enter the username and click **Submit.**



Step 3 – Confirmation of reset

Once the username has been submitted a message appears on the screen to confirm that an email has been sent to the registered email address for the user.

Step 4 – Receive reset email

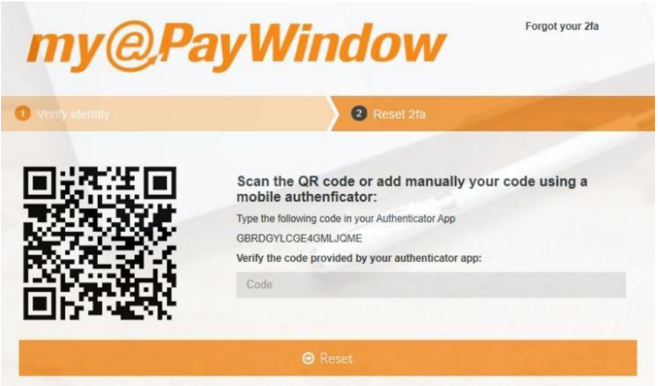
The user will receive an email (to the specified payroll registered email address) with a link to complete the 2FA reset. The link in the email will redirect the user to the Portal where they will be asked to verify their account, this link is only valid for 24 hours.

Step 5 – Verify identity

All fields must be completed correctly to verify identity and continue with the reset.

Step 6 – Reset 2FA

When the user has verified identity correctly, they will be presented with a screen to scan or enter a code.



myePayWindow maintenance

From time to time myePayWindow will require maintenance updates which are normally conducted outside normal business hours. During periods of maintenance the myePayWindow website will be taken out of service. If a user tries to access the website directly through a web browser the following message page will be displayed:

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
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