My ePay Window

Payroll Department Guide

Contents

Introduction

What is IRIS myePayWindow?

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

There are three different myePayWindow accounts available:

- Payroll Department
- Employer
- Employee

What will IRIS myePayWindow do for me?

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

Payroll Department Registration for portal

Once a Payroll Department 'staff' user has been invited to the Portal, they will receive an email invitation from **donotreply@myepaywindow.com** with a link that will take them to the Portal website to start registration. The invitation link within the email is valid for 20 days. If the link expires, a new invitation will need to be sent from the Payroll Department User (Re-invite).

Registration Step 1 – Verify Identity

After clicking the email link, the user is redirected to the website for the first step of registration, to verify their identity. The details on this screen must be entered correctly for the registration process to proceed. The Date of Birth and Secret Key will be provided by your Payroll Department Admin User, apart from the very first user where the details will be supplied by IRIS.

Note:

- The first user created is sent the required credentials from IRIS
- For Payroll Department Staff Users, the Secret Key is given by the Admin User
- For Employer Users it is a mutually agreed word
- Employees will be asked for their NI or Passport number

Registration Step 2 – Give consent

Step 2 is to **Give Consent to:**

- What information we collect
- Why we need it
- What we do with your information
- How long we keep it
- How we protect your information
- Your Consent

Scroll to the bottom of the **Give Consent** window and click **I Agree**.

If for any reason consent is not given, click **I do not agree**. A warning will be displayed, and the registration process will stop.

Registration Step 3 – Set up account

Step 3 is the user setting up the username and password they want for the Portal.

Username: minimum of 6 characters. An email address can be used

Password: minimum of 8 characters, 1 upper case, 1 lower case, 1 special, 1 numeric

Note: a special character is a punctuation type character, such as !, ?, %, = or *.

1. Enter your username

2. Enter your password

3. Repeat the password

4. Click Register

5. A message will be displayed confirming you have registered successfully

6. An email will be sent with a link to activate the account – Step 4

Step 4 – Activate account

This is the final step in the registration process. Click the link from the activation email, sent in Step 3. This link expires after 24 hours. If it expires but is within the 20 days from the original invitation, you can restart using the link in the initial invitation email. After 20 days, a new invitation would be required.

After selecting the link, the **Login** screen will appear. The user enters their **Username** and **Password** and selects **Login** to complete the registration. This will open the Payroll Department Dashboard Home Page.

Once you have setup your account you can publish from the payroll. For more information on publishing, select the link below for your product to view the guide:

Earnie myePayWindow Guide

IRIS Payroll Basics myePayWindow Guide

IRIS Payroll myePayWindow Guide

Security

myePayWindow is a highly secure website and service:

- All traffic to and from myePaywindow is sent via https encryption
- MyePayWindow has a security certificate issued from top level provider: Verisign
- The portal is secured behind firewalls and is subject to weekly ad annual 3rd party security tests
- Portal data and documents (where applicable) are encrypted at rest, using TDE, AES128
- All actions carried out on the portal are audited and traceable to individual user accounts

Passwords must be 8 characters in length and contain 1 upper case, 1 lower case, 1 number and 1 special character. When the password is saved to the database, it is not saved in a text format, but is encrypted using hashing and therefore is unreadable.

Five successive attempts to login with illegal credentials will lock the user out for 1 hour, before allowing another login attempt. Additionally, myePayWindow will automatically log users out after 5 minutes of inactivity, in order to minimise the possibility of sensitive data being viewed on unattended devices.

2-Step Authentication (2SA)

Payroll Department Users

2-step authentication (2SA) provides additional security for your users and can be enforced for compliance with company policies and procedures. When 2SA is enforced, next time they log in to myePayWindow, all Payroll Department users will be asked to create a memorable word between 6 and 12 characters in length. Once the memorable word is set up, when they login, the user will be prompted to select 2 random characters from the memorable word.

To enforce 2SA for your Payroll Department users:

1. Select **Administration** from the side menu

2. Choose the **Details** tab

3. Under the **Enforce additional authentication for Payroll Department Level Users** section, from the drop-down menu, select **Enable 2SA**

4. Click **Save Settings**

When a Payroll Department User next logs in or registers on myePayWindow, they will be prompted to enter a new memorable word.

5. Enter the new memorable word you would like to use

6. Confirm the memorable word

7. Click **Submit**

When the Payroll Department User then logs into myePayWindow, they will be presented with the normal login window. Here they enter their **Username** and **Password** and click **Login**. A screen will then be displayed asking for 2 random characters from the memorable word created. Enter these and click **Login**. If the memorable word has been forgotten, click **Forgot Memorable word?** to reset.

Employer Users

2SA can be enforced for all Employer and Employee level users.

To enforce 2SA for your Employer and Employee users:

1. Click on **Employers** from the side menu

2. Select the Employer and then choose **Administration**

3. Click on the **Details** tab

4. Under the **Enforce additional authentication for Employer & Employee Level Users** section, from the drop-down, select **Enable 2SA**

5. Click **Save Employer details**

When a User next logs in or registers on myePayWindow, they will be prompted to enter a new memorable word.

6. Enter the new memorable word you would like to use

7. Confirm the memorable word

8. Click **Submit**

When the user then logs into myePayWindow, they will be presented with the normal login window:

9. Enter their **Username** and **Password** and click **Login**

10. A screen will then be displayed asking for 2 random characters from the memorable word created. Enter these and click **Login** (If the memorable word has been forgotten, click **Forgot Memorable word?** to reset)

Individual Users

If 2SA is not enforced via a Payroll Department/Employer User, an individual user can enable (and remove) 2SA. To do this:

1. Log into myePayWindow

2. Select **My Settings** in the top right

3. Choose the **My Account** tab and click **Enable 2SA** (if this option is greyed out, 2SA has been enforced and the setting cannot be changed)

4. A warning will be displayed, click **Confirm** to enable 2SA

5. Enter **Username** and **Password**

6. Click **Login**

7. Enter your **Memorable Word** and then confirm

8. Click **Submit**

9. On the next screen, enter the requested 2 characters from your memorable word

10. Click **Login**

2-factor Authentication (2FA)

Payroll Department Users

2-factor authentication (2FA) provides additional security for your users and can be enforced for compliance with company policies and procedures. When 2FA is enforced, Payroll Department Users will require a smartphone 'Authentication App'. Each time they log in to myePayWindow, all Payroll Department users will need to enter a code, which is generated by the authenticator app, to gain access to their account.

To enforce 2FA for your Payroll Department users:

1. Select **Administration** from the side menu

2. Choose the **Details** tab

3. Under the **Enforce additional authentication for Payroll Department Level Users** section, from the drop-down menu, select **Enable 2FA**

4. Click **Save Settings**

When a Payroll Department User next logs in or registers on myePayWindow, they will need to download a smartphone authenticator app, scan or copy/paste the QR code to link their account to the app. On subsequent logins, the user will be required to enter a code generated by the app. If the user is unable to access their smartphone, they can reset 2FA during the logon process. Click on **Forget Authenticator** and enter your username to receive an email link to verify your identity and resent your 2FA.

Employer Users

2FA can be enforced for all Employer and Employee level users.

To enforce 2FA for your Employer and Employee users:

1. Click on **Employers** from the side menu

2. Select the Employer and then choose **Administration**

3. Click on the **Details** tab

4. Under the **Enforce additional authentication for Employer & Employee Level Users** section, from the drop-down, select **Enable 2FA**

5. Click **Save Employer details**

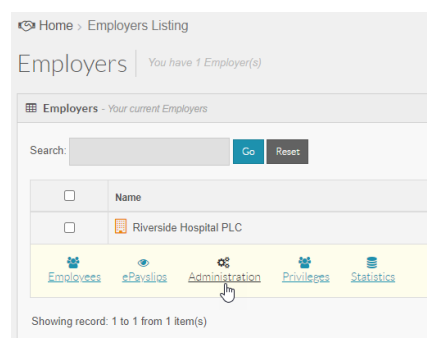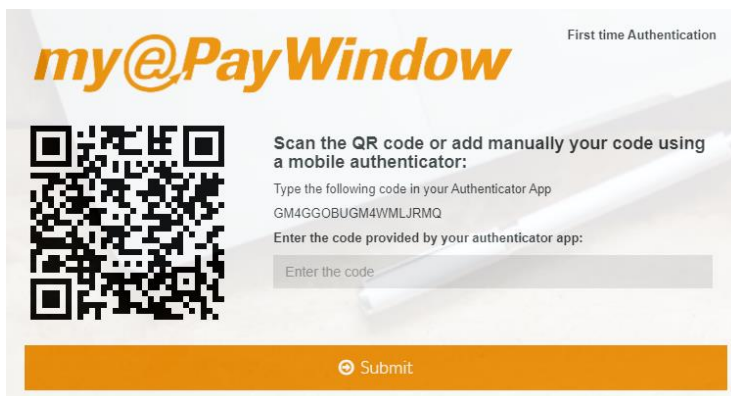Once 2FA is enforced here, when an Employer or Employee User next logs in or registers on myePayWindow, they will need to download a smartphone authenticator app, scan or copy/paste the QR code to link their account to the app. On subsequent logins, the user will be required to enter a code generated by the app. If the user is unable to access their smartphone, they can reset 2FA during the logon process. Click on **Forget Authenticator** and enter your username to receive an email link to verify your identity and resent your 2FA.

Individual Users

If 2FA is not enforced via a Payroll Department/Employer User, an individual user can enable (and remove) 2FA. To enable 2FA:

1. Log into myePayWindow

2. Select **My Settings** in the top right

3. Choose the **My Account** tab and click **Enable 2FA** (if this option is greyed out, 2FA has been enforced and the setting cannot be changed)

4. **Click Enable**

5. A warning will be displayed, click **Confirm** to enable 2FA

6. Enter **Username** and **Password**

7. Click **Login**

8. Use your downloaded authenticator app to scan the QR code displayed or enter the code into the app

9. Enter the one-time password code supplied by the authenticator

10. Click **Submit**

Deleting Users From the Portal

Payroll Department Users/Employer Users

1. From the side menu, choose **Administration**

2. From the **Users** tab, find the relevant user and click on the **+**

3. Select **Delete User**

4. Click **Delete** to confirm removal

From the Administration | Users tab, it is also possible to de-activate a user

Removing Employers from the Portal

If an Employer is no longer served by your payroll department, you will need to instruct IRIS myePayWindow to remove/anonymise the data so that it is no longer visible or accessible via the Portal. This process results in the Employer and all the data related to them being removed, resulting in all employee and payslip data no longer being visible. To give employers and employees time to download data, prior to its removal, there is usually a 3-month notice period. This action cannot be undone and therefore we need you to confirm your request in writing to us.

All data related to the Employer will appear as **na** and all names, addresses and personal information will no longer be visible.

Removing Employees from the Portal

If an employee requests to be removed from the Portal, you will have to instruct IRIS myePayWindow to remove their data and access. As with the removal of an Employer, the employee and all of the data related to the employee will be removed/anonymised. Employee aggregated financial values will remain on employer payroll summaries for the current tax year but will not be attributable to any individual. Once removed all data for the employee will appear as **na**. This action cannot be undone and therefore we need you to confirm your request in writing to us.

Portal Status Definitions

A Portal User's Status (Payroll Department User, Employer User, Employee User) will be one of the following:

- **Unregistered** – user not yet invited
- **Invited** – invitation sent but no action taken by the user yet
- **Activating** – user has received the invitation and is going through registration
- **Activated** – user has completed registration and is setup
- **Deactivated** – user account has been deactivated by Payroll Department User or an Employer User
- **Declined** – user has not given, or has withdrawn consent
- **Locked** – user has five failed login attempts resulting in the account being locked for one hour (you can unlock using the Reset/Unlock action)
- **Privacy Pending** – user has not yet agreed to the terms of use/Private
- **Unknown** – unable to connect with the Portal to establish status

Inviting Employees to the Portal

By default, employees will automatically receive an invitation for myePayWindow when data is published to the Portal. When you publish documents from payroll, employee accounts are generated, and if **Enable Automatic Invitation** is selected (this is set by default), invitations are sent. From the **Administration | Details** tab, Payroll Department and Employer Users can disable **Automatic Invitation | Enable Automatic Invitation**, if required.

Payroll Department and Employer Users can also Invite/Re-invite multiple employees. This allows you to Invite/Re-invite employees who may be unregistered or invited (but not activated).

Payroll Department User

1. From the side menu, select **Employers**

2. Select the **+** next to the relevant Employer

3. Click on **Employees**

4. Select the tick boxes next to the employees you wish to Invite/Reinvite – you can tick the box to the left of EeID to select ALL employees

5. You can sort the employees by clicking on the relevant column header, for instance, clicking on Status, you could see all Unregistered employees at the top, making it easier for selection

6. Click **Invite/Reinvite**

7. Select **Multi-invite** (Please note, this cannot be undone)

Viewing Employee Leavers on the Portal

Payroll Department Users and Employer Users can view employees who have left. Go to the **Employees Listing** and on the right-hand side, from the drop-down menu, choose **Leavers**.

How to Delete ePayslips

To delete all ePayslips for a selected Pay Period

A Payroll Department User can delete <u>all</u> ePayslips for a selected pay period. To do this:

1. From the side menu in myePayWindow, choose **Employers**

2. Choose the relevant Employer

3. Select **ePayslips**

4. Tick the box next to the relevant **Tax Year/Period**

5. Click on the **+**

6. Choose **Delete Payslips**

7. Select **Delete** on the warning to confirm deletion of payslips
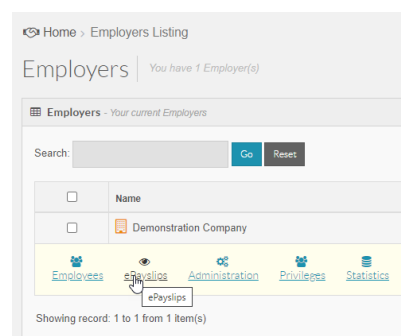
To delete a payslip for an individual employee

1. From the side menu in myePayWindow, choose **Employers**

2. Choose the relevant Employer

3. Select **Employees**

4. Click on the **+** next to the relevant individual

5. Choose **ePayslips**

6. Click the **+** next to the relevant **Tax Year/Period**

7. Select **Delete Payslip**

8. Click **Delete** on the warning to confirm deletion of the payslip
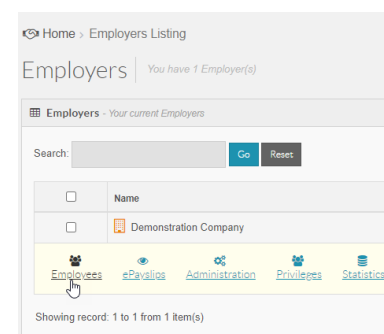
   Note: to delete all payslips for the employee (for all pay dates), select **Delete All Payslips**
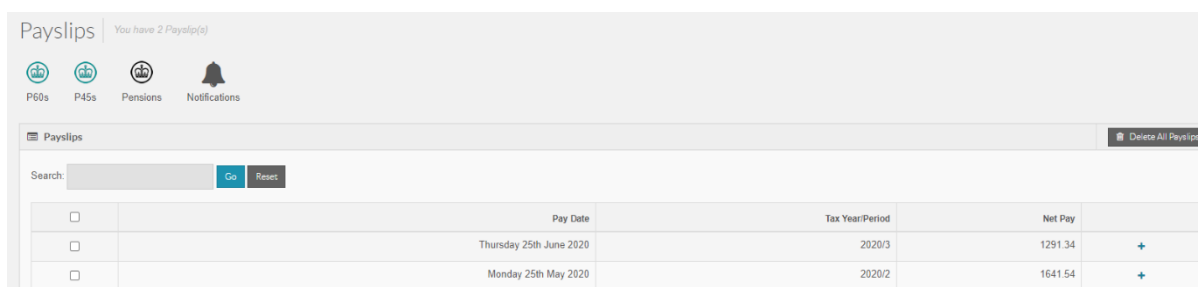
Portal Scheduled Maintenance

From time to time it is necessary to update the myePayWindow Portal. These maintenance updates are normally conducted outside of normal business hours. During periods of maintenance the myePayWindow website will be out of service. If a user tries to access the website directory through a web browser the following message will be displayed:

Resetting Usernames and Passwords

Resetting usernames and passwords is a fully automated process (it does not require Payroll Department User or Employer User intervention although resets can be initiated by these users, if required). All users can initiate a reset directly from their Portal login page, using the **Forgot Password?** or **Forgot Username?** links. Alternatively, once they have logged in to the portal, from their **My Settings | My Account** options. Resetting usernames and passwords requires the user to have access to their registered portal email account. The steps required are detailed on the screen but here is an example of resetting your password:

Example of Resetting Password

1. From the login screen, click **Forgot Password?**

2. Enter your **UserName** in the **Forgotten your password?** screen

3. Click **Submit**

4. A message will be displayed, confirming a link has been sent to your email

5. Click on the link in the email to reset your account security (the link is valid for 24 hours only)

6. All fields must be completed correctly to verify your identity

7. The last field will vary for each user as follows:

   - Payroll Department User – Payroll password
   - Employer User – Secret Word – given by the Payroll Department User
   - Employee User – National Insurance Number of Passport Number

   Please Note: if you have 5 failed verification attempts, the process will need to be restarted

8. Enter your new **Password** then re-enter in the **Confirm Password** field

9. Click **Reset**

> The Password will be validated and needs to meet the following complexity requirements:
>
> - 1 upper case character
> - 1 lower case character
> - 1 special character
> - 1 numeric character
> - Between 8 and 20 characters

Please Note: if resetting an email address where an employee works for 2 employers, a warning will be displayed. In these circumstances the employee will need to contact the Employer who can then send an email link to use to reset. This is done from the myePayWindow Portal by either the Payroll Department User of an Employer User. Once the email has been received with the reset link, the steps will be as follows above, steps 5-9.

Resetting Memorable Word

The procedure for resetting your memorable word is slightly different to the password instructions above.

1. Login with your **Username** and **Password** as normal

2. On the following screen, select **Forgot Memorable word?**

3. An email will be sent to the registered email address. Click on the link in the email to reset your account security (the link is valid for 24 hours only)

4. Complete all fields and click **Verify your identity**

5. Enter your new memorable word. This must be at 6-12 characters in length

When consent is declined

Step 1 – Consent withdrawn

During registration (step 2) or after registration, a user can withdraw consent. This means they no longer agree to the Portal Terms and Conditions and privacy. Within the Portal, consent can be withdrawn from **My Settings | Privacy and Terms**, by scrolling to the bottom of the page and clicking **I do not agree**. A confirmation message is displayed, and the user must confirm their required action.

Step 2 – Account deactivation

On withdrawing consent, the Portal account is automatically deactivated, and the account is disabled. A notification is sent to the Employer and Payroll Department User. To gain access to the account the Employee User will have to contact either Employer or Payroll Department User to be reinvited.

Step 3 – Attempted Login after consent withdrawal

If the user attempts to login after consent is declined, a message will display stating **username or password is incorrect**. The ability to reset the password or username will be disabled for the user and the system will not send reset security emails.

In-house Payroll

For the Payroll Department, the **In-house Payroll** setting (developed for bureau customers) allows the Payroll Department's own 'staff payroll' to be added to the Portal. Using the **In house Payroll** setting, the Payroll Department-Employer is hidden from the Employer listing for all Payroll Department Users.

To administer this staff payroll, your main Payroll Department user needs to set up a specific **Internal Employer User** account. This will need a separate username, password and ideally, email address.

This payroll can be treated like all other Employer payrolls and employee (staff) users can be invited. Employees that are Payroll Department Users should use a personal email address or different email address than that used for the Payroll Department Portal account.

Un-hiding the payroll

If you untick the **In-house Payroll** setting, the Employer will then become visible in the standard Employer listing. This can be done from the Employer User | Details tab.

Note: The **In-house Payroll** setting is only visible to the Internal Employer User if the setting has been ticked beforehand by a Payroll Department User.

> **Warning: Be careful not to use this setting on normal Employer payrolls as you will not be able to unhide the payroll without the Employer's help**

Restricting access to specific payrolls can be done using Privileges. This has no impact on the In-House payroll procedure described above.

Employers – Administration – Branding

Payroll Department users can view or set a **Company Logo** or **Colour Theme** for Employers in the **Administration | Branding** tab.
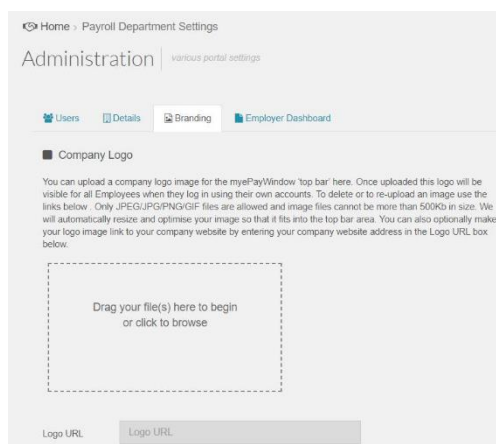
Note: In **Administration |Details**, tick the box to **Show Payroll Department Logo**. This will show the logo in the on their Employers Left Menu

Employers – Administration – Employee Dashboard

How to set up an Employer to Employee Broadcast Message (Employer User)

From the **Administration | Employee Dashboard**, use the date picker to pick a date that you would like the message to show from and enter the message, then click **Save**. This broadcast message will show on all employee dashboards. One message is available at a time. If you wish to remove the message you will need to click on clear.

How to set up Employer to Employee Useful Links (Employer User)

From the **Administration | Employee Dashboard**:

1. Click on the **Add new link** button

2. Enter the **Title** of the useful link e.g. HMRC

3. Enter the **URL** of the website or document

4. Choose whether you want the website shown as a link or a tile on the dashboard

5. Click **Save new link**

The link will be on the Employee Dashboard. You can create as many useful links as you like, however, we recommend that 5-8 useful links and 2 tiles on the dashboard.

Useful Links

Tiles

To delete a useful link, from the **Administration | Employee Dashboard**, next to the relevant link, click on the bin icon. This will remove the link from the Employee Dashboard.

Switching useful links view from Employer to Employee

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 User). Use the drop-down menu from the Useful Links section to choose **Employer** or **Employee**.

Employer – Administration – Payslip Settings

Under **Employer | Administration | Payslip Settings**, Payroll Department staff can view or set up the Payslip Logo and Payslip data elements for Employers.

Privileges (Payroll Department User Level)

The Privileges section provides access to the following Payroll Department functions:

- **Employer Groups** tab – Create New Employer Group(s) and add Employers, as required
- **Roles – Privileges** tab – set up new access Role(s) with appropriate privileges
- **Groups – Roles – Users** tab – add the required Role(s) to each Employer Group(s) and add the Employer Users to each Role (remove them from the Full Access Role as required)

Note: Depending on the Role a Payroll Department Staff User belongs to, access to the Privileges page may be restricted or unavailable.

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

Step 1 – Add Employer Group

From the **Privileges | Employer Groups** page, you can create a logical Employer group and add Employers to it.

Note: All myePayWindow Employers are automatically added to the default **All Employers** group. Employers cannot be removed from the default All Employers 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 Employer Group listing to Add a **Group** (to edit or delete a Group use the Icons per Group in the listing).

You must enter an Employer Group Name (100 characters) and provide a description (500 characters).

Add Employers (by analysis group) to the Employer Group(s).

Use the alpha/numeric filters or the use the search box, then click the Employer name(s) to add to the Employer group. You can click the **Yes** button in the **Select All Data** section, to add All Employers to the group.

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

To remove individual employers from the group, click the bin icon in the Employer Members section of the screen.

When you have chosen all the employers for this group, click **Save** to apply.

Step 2 – Create Roles – Privileges

On the **Privileges | Roles – Privileges** tab, you can create a Role and add Privileges to it.

Note: Existing Payroll Department Staff Users are automatically added to the default Full Access Role that has full access privileges to the default All Employers 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 Employer Group.

1. Click **Add** 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)

2. Enter a **Role Name** (100 characters)

3. Enter the **Role Description** (500 characters)

4. Click **Next**

5. Add **Role Privileges**

   Role Privileges allow different levels of access to myePayWindow menus and the actions available within them. A main menu item can be **Allowed** or, alternatively, **Custom** access can be used to further refine access: **Full Access**, **No Access** or **Read Only**). For example, using the selectors on the left, a Role can be set up to **Allow** access to the Employers menu but with **Read Only** access to the Employees 'action' but with **No Access** to the ePayslips action. Setting ePayslips action to **No access** will override any higher-level **Full Access** which would otherwise allow Employers' payslips to be viewed.

6. Choose the access levels using the selectors

7. Click **Save**

Step 3 – Add Roles and users to Employer Groups

The final step is to add **Roles** to **Employer Groups** and Payroll Department Staff Users to the Roles, as required.

Note: A Payroll Department Staff User must be added to one or more Roles in each Employer Group they need access to.

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

Existing Payroll Department Staff Users are automatically added to the default Full Access Role for the Default All Employers Group. Remember to remove Payroll Department Staff Users from this Default Role as this will override any other Role and Privileges to which they are added.

For the required Employer Group in the listing:

1. Click the **Add Role** button

2. Select the roles you would like to add to the Employee Group and click **Add**

3. Click **Add user +** to add users you would like to add to the Role

4. Select the users and click **Add**

Privileges – Best Practice – Payroll Department User

Once you start using Privileges to restrict access to tone or more Employer payrolls, it is good practice to:

- Create an alternative 'All Employers – Unrestricted' Employer Group and add all Employers to this by name (not as All data)
- Create an alternative 'Payroll Department Full Access' Role without Payroll Department Administration and Privileges access
- Add the 'Payroll Department Full Access' Role to the 'All Employers – Unrestricted' Employer Group and add most staff to this role
- Leave your Payroll Department Administrator in the default Full access role and default 'All Employers Group' and remove all other staff users. Your 'Super' or 'Admin' user retains full access to everything

Step-by-step

Step 1

Add All Employers – Unrestricted Employer Group

Add Employer Group

Add Employers

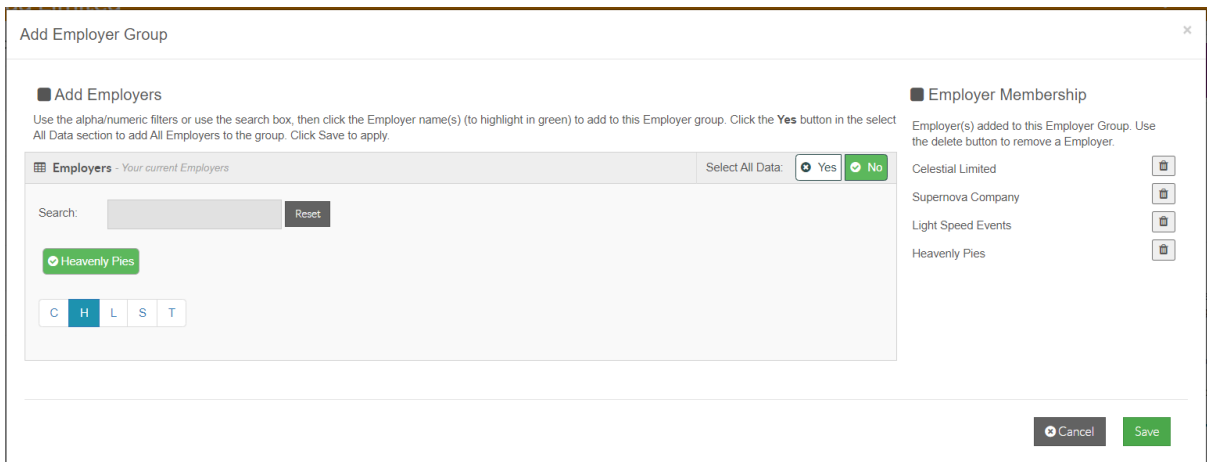Use the alpha/numeric filters or use the search box, then click the Employer name(s) (to highlight in green) to add to this Employer group. Click the **Yes** button in the select All Data section to add All Employers to the group. Click Save to apply.

⊞ Employers - *Your current Employers*		Select All Data:	⊗ Yes	✓ No

Search: [   ] [Reset]

✓ Heavenly Pies

[C] [**H**] [L] [S] [T]

⬛ Employer Membership

Employer(s) added to this Employer Group. Use the delete button to remove a Employer.

Celestial Limited	🗑
Supernova Company	🗑
Light Speed Events	🗑
Heavenly Pies	🗑

[⊗ Cancel] [Save]

Step 2

Add Payroll Department Full Access Role Privilege

Add Role Privileges

⬛ Add Role name and description.

Tip: To make it easier when adding Roles to Employer Groups and Staff Users to Roles (Groups-Roles-Users tab) it helps if the Role name reflects the level of Privileges available e.g. 'No ePayslips access'

Role Name	Payroll Dept Full Access Role - No Administration & Privilege Access
Role Description	Payroll Dept Full Access Role - No Administration & Privilege Access

⬛ What is a Role?

A **Role** defines the set of **Privileges** a Staff user will inherit once they are added to this **Role**.

[⊗ Cancel] [Next]

Add Role Privileges

⬛ Add Privileges

When **All menus** access is **Allowed** all **left menu** options in myePayWindow and associated 'actions' are accessible to the **Role**.

With **Custom** privileges, **left menu** access can be defined per **Role** and also (where available) access to the 'actions' available per menu. Choose the access levels using the selectors below and click the **save** button to apply them to this **Role**.

⬛ What are Role Privileges?

Role **Privileges** allow different levels of access to myePayWindow menus and the actions available within them. A main menu item can be **Allowed** or alternatively **Custom** access can be used to further refine access **(Full Access, No Access, Read only)**. For example, using the selectors on the right, a **Role** can be set up to **Allow** access to the Employers menu but with **Read only** access to the Employees 'action' but with '**No access**' to the ePayslips action. Note: setting the ePayslips action to '**No access**' will override any higher level 'Full Access' which would otherwise allow Employees payslips to be viewed.

All menus — [Custom ▾]

- Employers - Menu — [Allowed ▾]
  - 👥 - Employees
  - 👁 - ePayslips
  - ⚙ - Administration
  - ☑ --- Approvals
  - 👥 - Privileges
  - 📄 - Statistics
- Approvals - Menu — [No Access ▾]
- Statistics - Menu — [No Access ▾]
- Administration - Menu — [No Access ▾]
- Privileges - Menu — [No Access ▾]

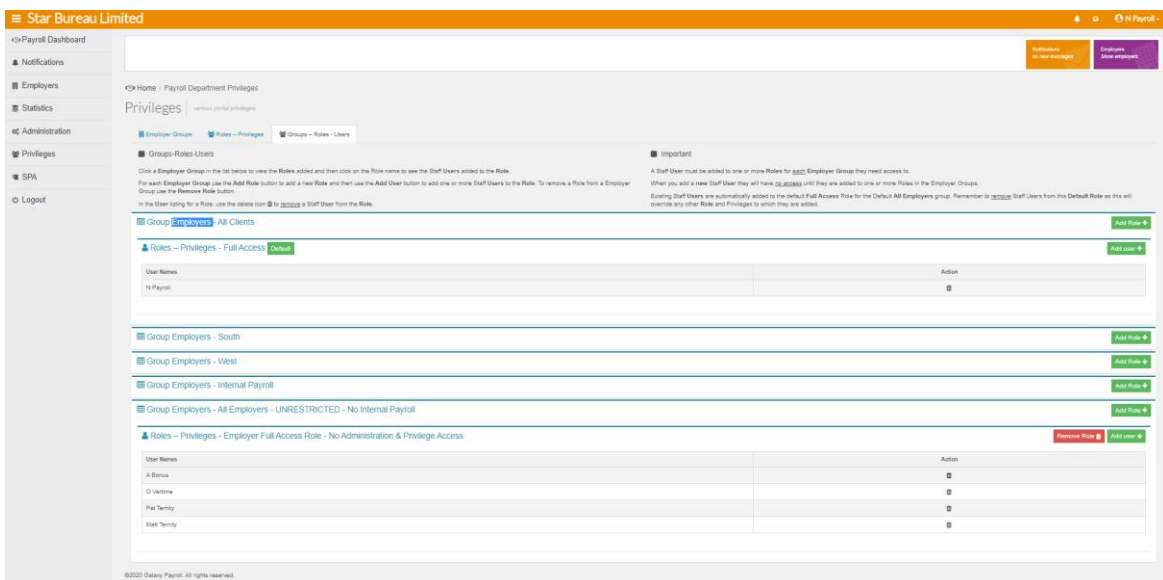[⊗ Cancel] [Save]

Step 3

Add Payroll Department Full Access Role to All Employers Unrestricted and add staff users

Step 4

Remove all other staff users from Default All Employers Group – leave 'Super' user in Default Full Access Role

Note: All users will be able to see all Employers, apart from the internal payroll. Please remember, any new staff 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 Employers.

Administration

The **Administration** page provides access to the following Payroll Department User administration functions:

- **Users** tab – a list of all the Payroll Department 'Staff' users and their Portal status. These users can be deactivated, and be sent reset password or username emails, as required
- **Details** tab – The Payroll Department address details, and the ability to set the default 'notification recipient' contact for the Payroll Department for Employer document uploads. 2-step authentication can be enforced here for your Payroll Department users. Set your Payroll Department logo on your Employers left menu
- **Branding** tab – here you can define the Portal's Payroll Department colour theme and Company logo
- **Employer Dashboard** – create useful links that appear on your Employer dashboard. Create Broadcasts to show on all your Employers' dashboards

Note: Employer Portal Users have a similar Administration page with access to the very similar functionality above to set up the Portal for their Employees.

Access to the Administration pages can be restricted or denied to Payroll Department Staff Users via myePayWindow Privileges.

Administration – Users

Here you can see the Payroll Department Users connected to the Portal, together with their Portal Status.
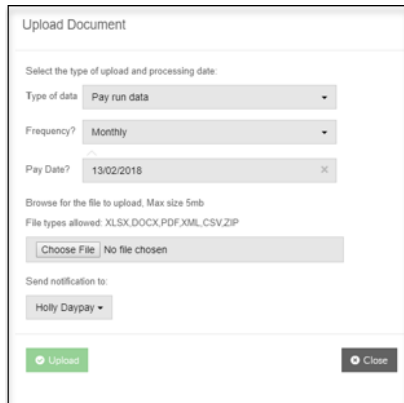
Click anywhere on a Staff user entry, or on the '+' button to see the actions available for the individual staff user. The actions available will vary depending upon their user status:

- **Deactivate** – deactivate a Staff user's account
- **Reset memorable word** – send a memorable word reset email to the Employer user
- **Reset/Unlock** – reset password/username. Send a Password/username reset email to the Employer user. If the user is locked, you can reactive here
- **Delete** – delete a user. This is only possible if the user status is unregistered or invited

Administration – Details

This page shows the Payroll Department's address and contact information. On this page the Payroll Department must choose the default contact for all declined consent notifications.

Note: By default, the first activated staff user in the list will be set. You can change this, if required, if the Payroll Department does not want to use a single contact for all inbound notifications
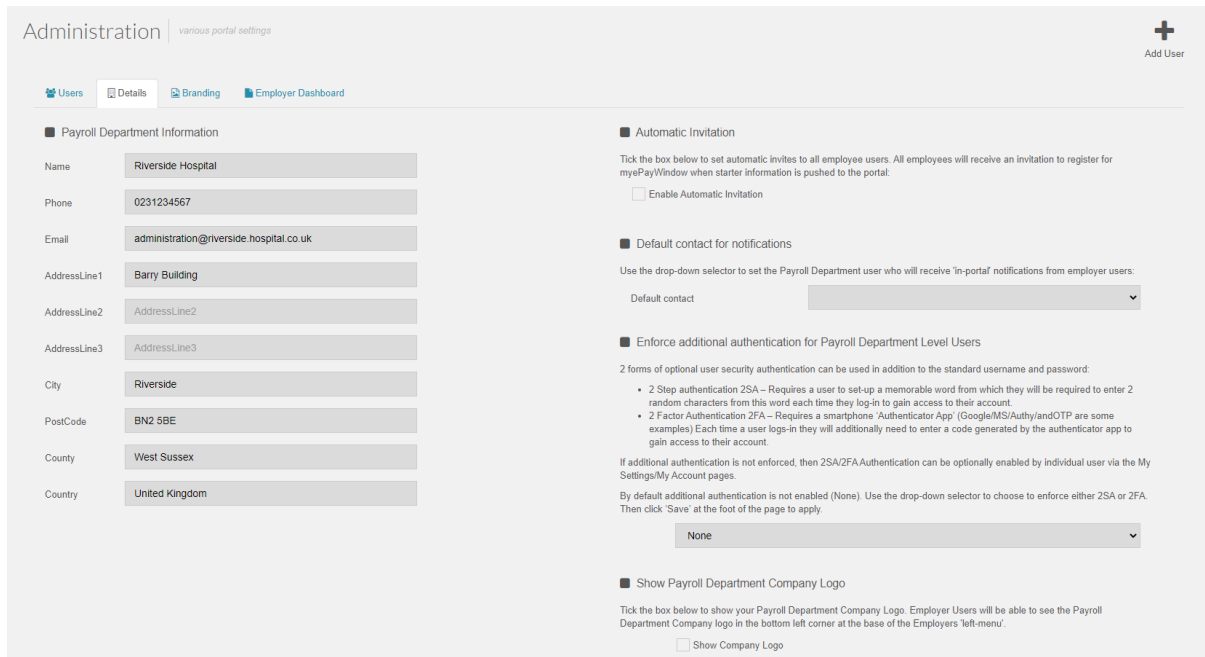
To choose the default contact, pick the user from the drop-down selector and click **Save Settings**

The Payroll Department has the option to set a centralised email for notifications. When an email is set for 'Email mailbox for centralised notifications' whenever an individual notification is set to a Payroll Department user the centralised email will also be sent a message with details of this.

2-step authentication can be enforced here for your Payroll Department Users. If 2SA is enforced here, all Payroll Department Users will be prompted to create a memorable word when they next log in or register with myePayWindow. Click on **Enable 2SA** and **Save Settings**.

My settings

My settings contain the individual Portal users' settings and details. Various personal preferences can be set here for the Payroll Department user and these features will be extended in future releases.

My Settings – My Key Info

On the My Key Info tab, you can view:

- The date of the user's Last Login
- The date the user was Invited
- The user's Role

Fields on My Key Info are not editable. Any data changes required must be made in payroll and updated on submission of data.

My Settings – My Account

From this tab you can reset account security:

- Click **Change password** to start the reset process
- Click **Change username** to start the reset process
- Enable/Remove 2SA/2FA to use/disable 2-step/2-factor authentication, as part of the login process (provided it is not enforced via Administration at Payroll Department/Employer level)

My Settings – My Settings

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

- Add Quick Access buttons for easier user access, via a smartphone or small tablet

Use the drop-down selects to assign a side-bar menu item to **Quick Access button 1, 2, 3** and 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 the closest to your thumb on a smartphone!

- Email Notifications – the option to receive an email notification summary to your registered Portal account email address is selected by default

Use this tick box to opt to receive an email summary for new notifications. An email summary will be sent to your registered account email address if you have new, unread notifications in the last hour.

By opting to receive an email notification, you will be notified on the email associated with your account that a new notification has been received. These will be sent hourly if there has been no activity on your Portal account.

My Settings – Privacy & Terms

- Privacy & Terms – here you can view or download myePayWindow privacy and terms and also access the consent option

Every Portal user must provide consent on registration. If they wish to withdraw consent after registration, they can scroll to the base on the screen and click **I do not agree**. This will deactivate the user immediately and set their status as **Declined** and notifications sent to the Payroll Department Users and Employer Users.

If the individual subsequently decides they want to use the Portal, they will need to be reinvited.

Other myePayWindow Guides

Employer myePayWindow Guide

Employee myePayWindow Guide

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