



Getting Started with IRIS Payroll



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How do I create a login to myPay Solutions on IRIS Payroll?



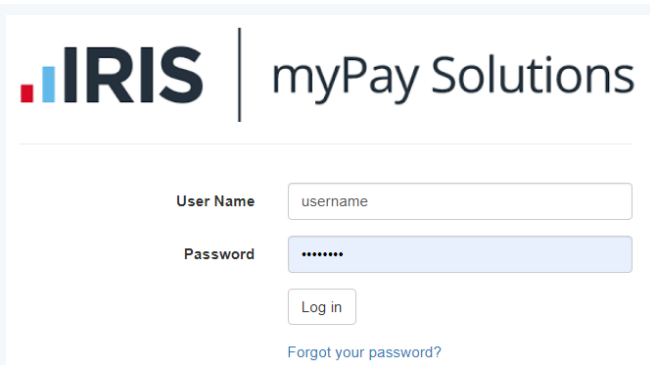
1. Look for an email with the subject line "Login Credentials for Firm Portal" from **noreply@accountantsworld.com**
2. Your **User Name** will be provided in the email.
3. Click on the link in *Step 1* of the email to create your 16-character **Password**.
4. Once your password has been set, you can login using your User Name and Password at: <https://login.accountantsoffice.com>
5. If prompted for a Firm Code, enter: **IRISPAY**

How do I setup Two-factor Authentication (2FA) for my login?



1. The first time you login to your new myPay Solutions portal, you will be required to setup **Two-factor Authentication (2FA)**.
2. You can choose to either provide a 10-digit phone number to receive MFA login codes via text message or phone call, or you can choose to link your login to a pre-existing Authenticator App.

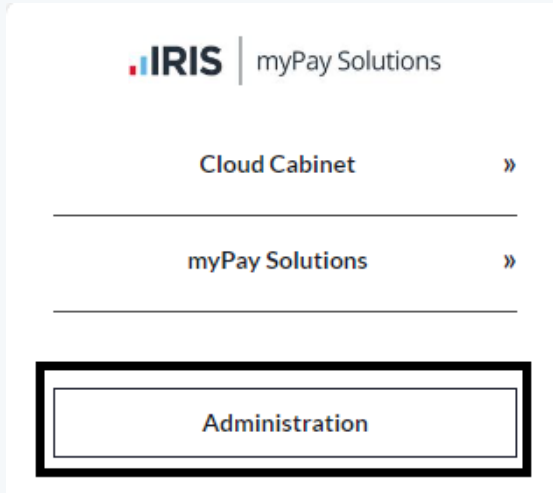
How do I login to myPay Solutions on IRIS Payroll?



1. Enter your **User Name** and **Password** at: <https://login.accountantsoffice.com>
2. If prompted for a "Firm Code," enter: **IRISPAY**
3. Click the **Log in** button.

How do I View My Payroll Clients?

1. From the login screen, click **Administration**



2. The **Client Management** screen will appear. Here you can view all of your active clients.

The top bar allows you to filter and search through the list.

You can also sort by the various fields by selecting them from the table header.

Client Management

Select: Active Terminated

Filter by:

Client Code	Client Name	Phone	Applications
443675	Royal Tuna Supply, Inc.		
098573	EZ Home Sofas and Couches		
023747	Yesterday's News, LLC		
111033	The Best Eatery		

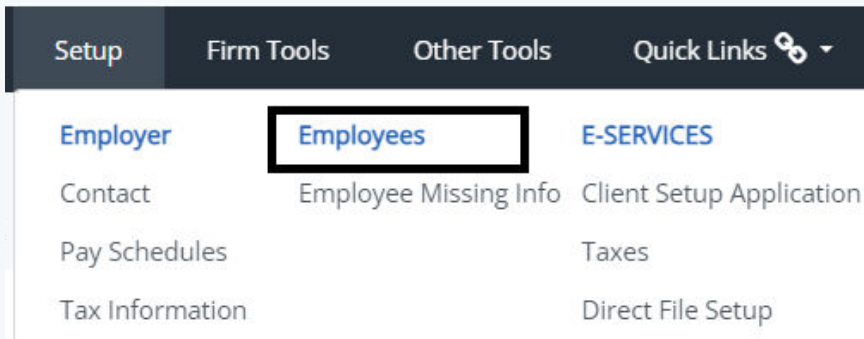
How do I Add Employees?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



The screenshot shows the top navigation bar with the IRIS logo on the left, 'Payroll Americas' in the center, and a dropdown menu on the right labeled 'SELECT EMPLOYER' with a downward arrow.

2. Select **Setup**, then **Employees**



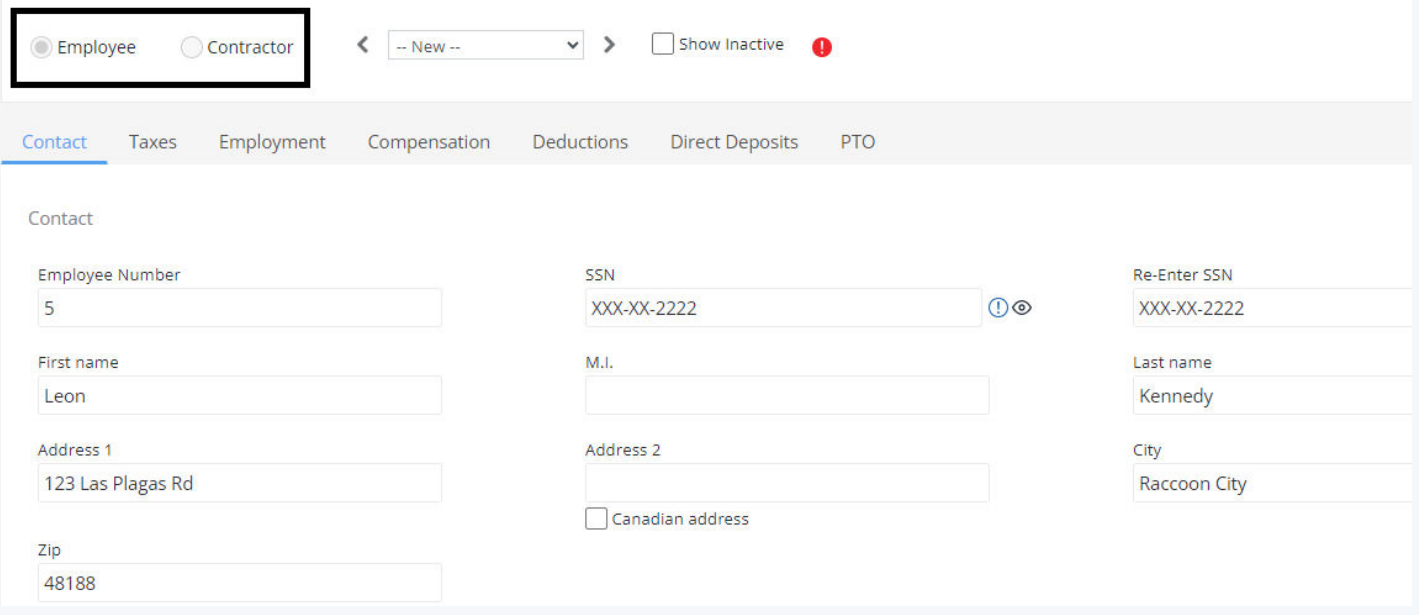
The screenshot shows a navigation menu with four main categories: 'Setup', 'Firm Tools', 'Other Tools', and 'Quick Links'. Under 'Setup', there are three sub-items: 'Employer', 'Employees' (which is highlighted with a black box), and 'E-SERVICES'. Below these are several other options like 'Contact', 'Employee Missing Info', 'Client Setup Application', 'Pay Schedules', 'Taxes', and 'Tax Information'.

3. At the bottom of the screen, select **Add**.



The screenshot shows a row of buttons at the bottom of the screen: 'Add' (highlighted with a black box), 'Employee List', 'Import', 'Delete', 'Save', 'Cancel', and '>>'.

4. On the **Employee/Contractor Setup** screen, select whether it is a W2 employee or an independent contractor, then fill out the employee's demographic information.



The screenshot shows the 'Employee/Contractor Setup' screen. At the top, there are two radio buttons: 'Employee' (selected) and 'Contractor'. Below this is a dropdown menu set to '-- New --' and a 'Show Inactive' checkbox. The main content area has several tabs: 'Contact', 'Taxes', 'Employment', 'Compensation', 'Deductions', 'Direct Deposits', and 'PTO'. The 'Contact' tab is active, showing a form with the following fields: 'Employee Number' (5), 'First name' (Leon), 'Address 1' (123 Las Plagas Rd), 'Zip' (48188), 'SSN' (XXX-XX-2222), 'M.I.', 'Address 2', 'Re-Enter SSN' (XXX-XX-2222), and 'Last name' (Kennedy). There is also a 'City' field with 'Raccoon City' and a 'Canadian address' checkbox.

How do I Add Employees? (continued)

4. After entering the employee's demographic information, at the bottom of the Employee Setup screen is a check box to **Allow access** to an **Employee portal**.

This is where the employee retrieves copies of their pay stubs and year-end forms.

To create the **Employee portal**, add the employee's **Email address** and check the box to **Allow access**.

Once complete, click **Save** at the bottom to add the new employee.

(If you've chosen to allow access to the **Employee portal**, clicking **Save** will send the employee an email with the link to register their account.)

The screenshot shows the 'Employee Setup' form with the following fields: Gender (radio buttons for Male and Female), Date of birth (text input with '04/16/1993'), Ethnicity (text input), Cell Phone (text input), Email (text input), and Employee portal (checkbox for 'Allow access'). At the bottom right, there is a row of buttons: 'Add' (dashed border), 'Employee List', 'Import', 'Save' (highlighted with a black box), and 'Cancel'.

5. Navigate through the remaining tabs, **Taxes, Employment, Compensation, Deductions, Direct Deposits**, and **PTO** to fill out the remaining details of the new employee.

Once complete, select **Save** at the bottom again to finalize the new employee.

The screenshot shows the 'Employee/Contractor Setup' section. At the top, there are radio buttons for 'Employee' (selected and highlighted with a black box) and 'Contractor'. To the right is a dropdown menu with '-- New --' and a 'Show Inactive' checkbox with a red warning icon. Below this is a horizontal tab bar with tabs for 'Contact' (active), 'Taxes', 'Employment', 'Compensation', 'Deductions', 'Direct Deposits', and 'PTO'. The 'Taxes' through 'PTO' tabs are highlighted with a black box.

6. Once you've completed each relevant tab, select **Save** at the bottom again to finalize the new employee.

The screenshot shows the bottom navigation bar with buttons: 'Add' (dashed border), 'Employee List', 'Import', 'Save' (highlighted with a black box), and 'Cancel'.

Continued on next page...

How do



How do Employees Register Their Employee Portal?

1. Once you have granted access to the Employee portal, the employee will automatically receive a copy of the **Employee Portal Registration Email** (clipped below).

The email provides the employee with their **User Name** (the *Login name* you setup in Step 4) and a link to click to setup their **password**.

It also gives them the specific **Firm Code** (IRISPAY) to enter when prompted on the login page.

**Note: The Employee Portal Registration Email currently references "Payroll Relief" as the platform. The language in the email will be updated to reflect the latest branding on a future release.*

We are pleased to inform you that we have set up your access to the Employee Portal Payroll Relief, enabling you to view your own p below:

Step 1:

- Your Employee Portal Payroll Relief User Name is: alberttest
- [Click here](#) to setup your password.

(This link is only active for **24 hours**, so please initialize your login as soon as possible.)

Step 2:

Access Employee Portal Payroll Relief Mobile App:

- Download the mobile app. You can download the mobile app as you would any other.
- For Apple users, go to App Store to download the application.
- For Android users, go to Google Play to download the application.
- For both Apple and Android users, type Employee Portal Payroll Relief in the Search box to access the application.
- To use the app, enter the following details:

FIRM CODE: IRISPAY

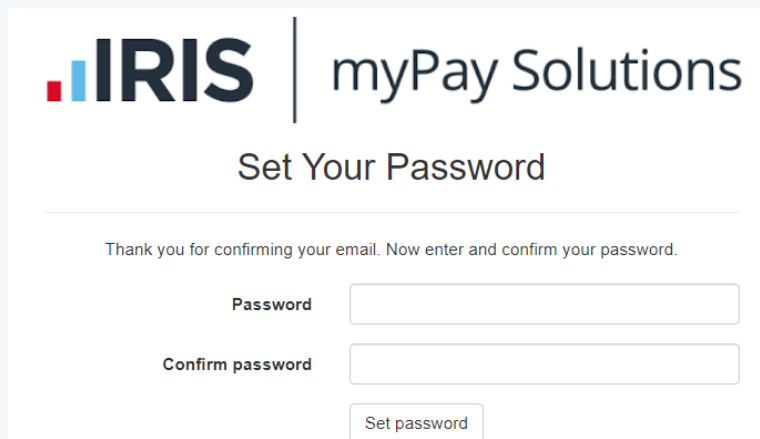
USERNAME: alberttest

Password: The one you set up in the step above

Access Employee Portal Payroll Relief Using A Web Browser:

In addition to the mobile app, from your computer using any web browser, you can access the web version of the **Employee Portal** for easy access.

2. After clicking the link in the email, they're brought to a page to create and confirm a **password**.



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How do Employees Register Their Employee Portal? (continued)

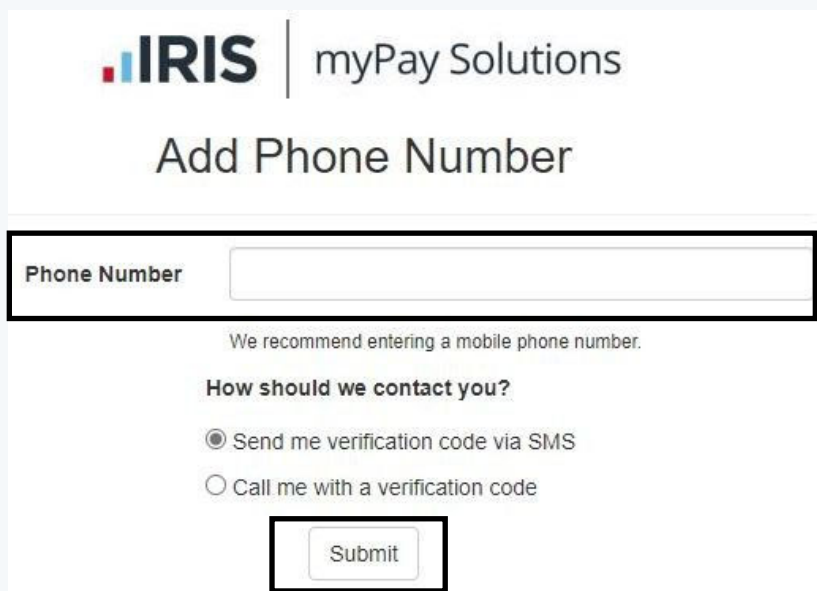
3. After setting up their password, the employee must also choose a method for **Two-Factor Authentication (2FA)**.

They can use their phone to receive a text or call, or choose to use an Authenticator App.



The screenshot shows the 'Additional Security' page. At the top is the IRIS myPay Solutions logo. Below the logo is the heading 'Additional Security'. A paragraph of text explains that Two-Factor Authentication has been added to the system login and that users must confirm their identity with a verification code. Below this text, it says 'Click one of the following to obtain and enter a verification code:' followed by a bulleted list of two options: 'Add Phone Number - Enter a valid phone number we can call or text with a code.' and 'Use Authenticator App - Use an authenticator app on your smartphone to obtain a code.' At the bottom of the list are two buttons: 'Add Phone Number' and 'Use Authenticator App', both of which are highlighted with a black rectangular border.

4. If they elect to receive a text/call to authenticate their access, they must enter their 10-digit phone number and click **Submit**.



The screenshot shows the 'Add Phone Number' page. At the top is the IRIS myPay Solutions logo. Below the logo is the heading 'Add Phone Number'. A form field labeled 'Phone Number' is highlighted with a black rectangular border. Below the form field is a note: 'We recommend entering a mobile phone number.' Underneath is the question 'How should we contact you?' followed by two radio button options: 'Send me verification code via SMS' (which is selected) and 'Call me with a verification code'. At the bottom of the page is a 'Submit' button, also highlighted with a black rectangular border.

Continued on next page...

How do Employees Register Their Employee Portal? (continued)

5. If the employee prefers to use an **Authenticator App** for Two-factor Authentication (2FA) instead of receiving a text/phone call, they will need to open their preferred Authenticator App and follow the instructions provided by their application.

Usually this involves taking a picture of the unique QR code generated for them on screen, as in the example below.

Once they have performed the steps required by their Authenticator App, they will be provided with a 6-digit code to enter on the screen. Click **Enable** to save.

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Use Authenticator App

We recommend Google Authenticator App for [Android](#), [iOS](#) or [Blackberry](#). Use Authenticator+ app for [Windows Phone 8.x](#) or [Windows 10 Mobile](#).

1. Open Authenticator app
2. Scan QR code at right
3. Enter generated 6-digit code below

Code

or [cancel](#)



6. After completing the steps, the employee will be asked to login using their **user name** and **password**.

Note: If ever prompted to enter a **Firm Code during login, enter **IRISPAY**.*

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Accountants Office Online

User Name

Password

[Forgot your password?](#)

Firm Code

User Name

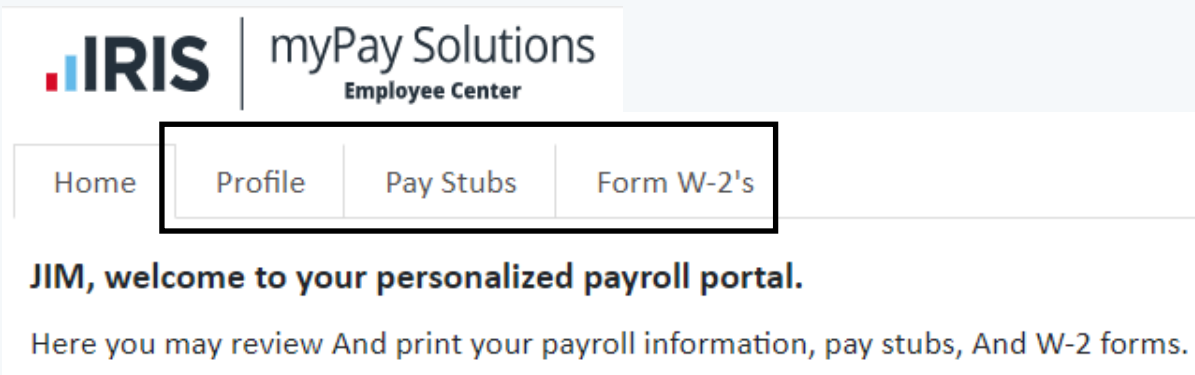
Password

Continued on next page...

How do Employees Register Their Employee Portal? (continued)

7. After the employee logs in to their portal, they will have access to view **Pay Stubs, W-2s**, and to update some basic demographic information in their **Profile**.

They cannot currently update their W-4 information through the Employee portal, but the functionality is being looked at as a potential enhancement in the near future.



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Employee Center

Home Profile Pay Stubs Form W-2's

JIM, welcome to your personalized payroll portal.

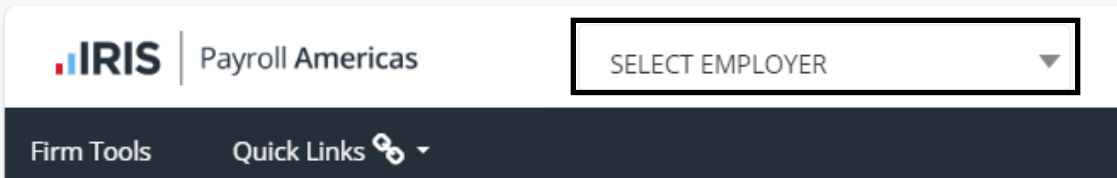
Here you may review And print your payroll information, pay stubs, And W-2 forms.

**Note: Everyone using the IRIS Payroll application (Accountants, Employers, and Employees) should save this web address as a Favorite for the best login experience:*

<https://login.accountantsoffice.com/login?firmCode=IRISPAY>

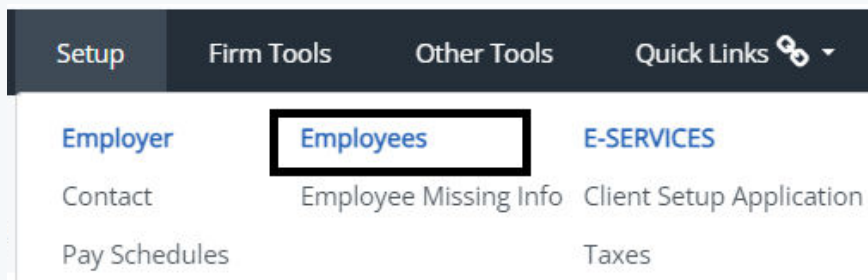
How do I Resend an Employee Portal Registration or Password Reset Email?

1. Employees can reset their passwords by clicking on the **Forgot your password?** link on the login screen. As an administrator, you also have the ability to send the Reset Password Email or Resend Employee Portal Registration Email depending on if they've registered their Employee portal or not. To get started, select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



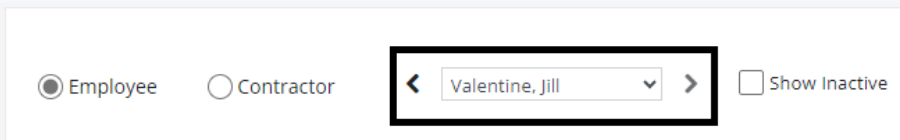
The screenshot shows the top navigation bar of the IRIS Payroll Americas system. On the left is the IRIS logo and the text 'Payroll Americas'. To the right is a dropdown menu labeled 'SELECT EMPLOYER' with a downward arrow, which is highlighted with a black rectangular box. Below this bar is a dark navigation menu with 'Firm Tools' and 'Quick Links' with a gear icon and a dropdown arrow.

2. Select **Setup**, then **Employees**



The screenshot shows the 'Setup' menu in the system. The 'Setup' tab is selected and highlighted in dark blue. Below it, the 'Employees' option is highlighted with a black rectangular box. Other options visible include 'Employer', 'E-SERVICES', 'Contact', 'Employee Missing Info', 'Client Setup Application', 'Pay Schedules', and 'Taxes'.

3. In the drop-down list, select the employee you wish to send the registration/password reset email to.

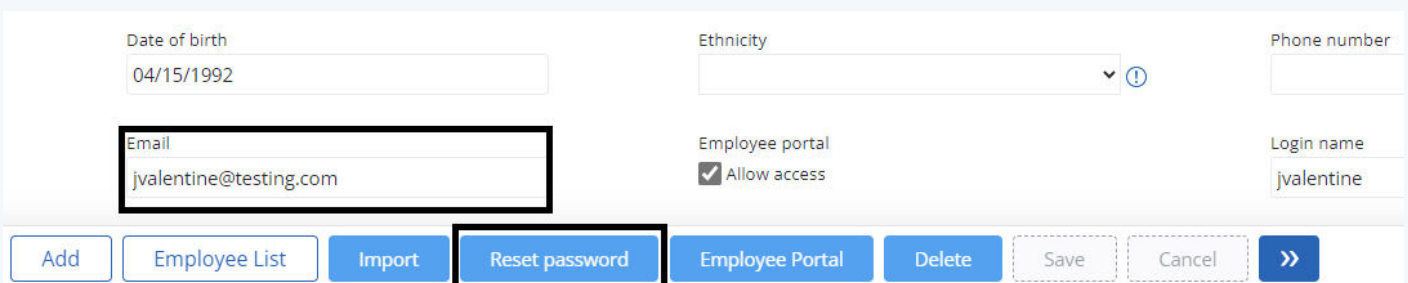


The screenshot shows the employee selection interface. There are radio buttons for 'Employee' (selected) and 'Contractor'. To the right is a dropdown menu with 'Valentine, Jill' selected, highlighted by a black rectangular box. Further right is a checkbox labeled 'Show Inactive'.

4. The **Contact** tab for the employee will appear.

On the bottom of this screen, verify that the email address is correct for the employee, then click on the **Reset password** button.

This will send either the Employee Portal Registration Email or the Password Reset Email as applicable to the email address on file for the employee.



The screenshot shows the employee contact information form. Fields include 'Date of birth' (04/15/1992), 'Ethnicity' (dropdown), 'Phone number' (empty), 'Email' (jvalentine@testing.com, highlighted with a black box), 'Employee portal' (checkbox checked 'Allow access'), and 'Login name' (jvalentine). At the bottom is a row of buttons: 'Add', 'Employee List', 'Import', 'Reset password' (highlighted with a black box), 'Employee Portal', 'Delete', 'Save', 'Cancel', and a double arrow button.

How do I Modify Employee Pay Rates?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).

2. Select **Setup**, then **Employees**

3. In the drop-down list, select the employee you wish to edit, and then choose the **Compensation** tab.

4. On the **Compensation** screen you can choose between **Salaried** and **Hourly** and make adjustments to an employee's annual salary or hourly pay rate. Once you've made your adjustment, select **Save** at the bottom of the screen. **Note: The **Default hours** field controls how many hours are added to the employee by default each pay cycle.*

How do I Modify Employee Pay Rates? (continued)

4. On the **Compensation** screen you can choose between **Salaried** and **Hourly** and make adjustments to an employee's annual salary or hourly pay rate.

Once you've made your adjustment, select **Save** at the bottom of the screen.

Note: The **Default hours field controls how many hours are added to the employee by default each pay cycle.*

Contact Taxes Employment **Compensation** Deductions Direct Deposits PTO

Compensation

Pay schedule
Testing Cycle (Bi-Weekly)

Regular pay
 Salaried Hourly

Annual salary	Default hours	Rate of pay
0.00	0.00	18.0000

Additional pay types	Default	Rate
Reimbursement	0.00	

Add Employee List Import **Save** Cancel << >>

How do I Remove Employees?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).

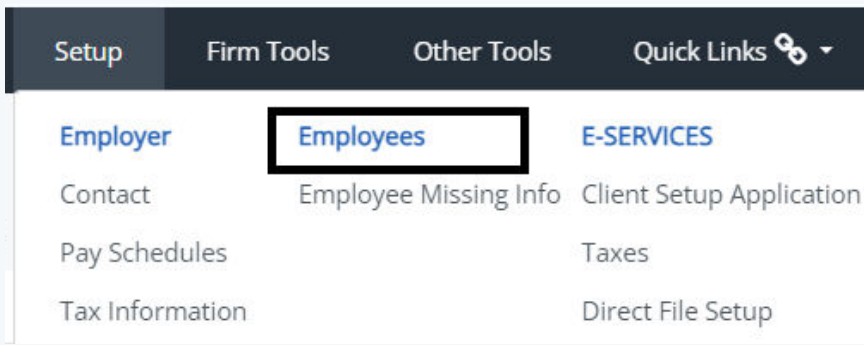


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SELECT EMPLOYER

Firm Tools Quick Links

2. Select **Setup**, then **Employees**



Setup Firm Tools Other Tools Quick Links

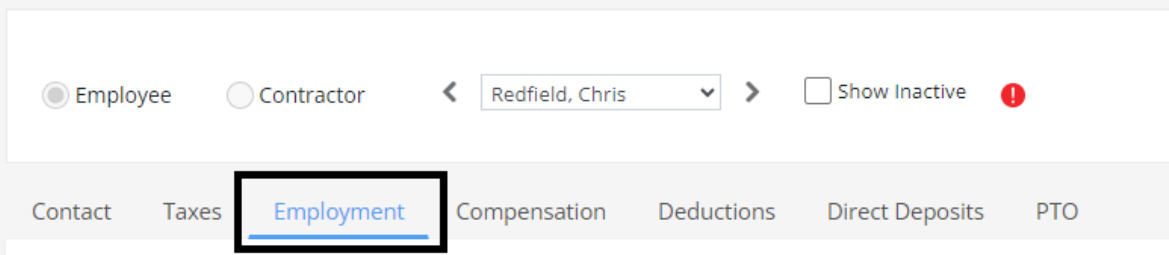
Employer **Employees** E-SERVICES

Contact Employee Missing Info Client Setup Application

Pay Schedules Taxes

Tax Information Direct File Setup

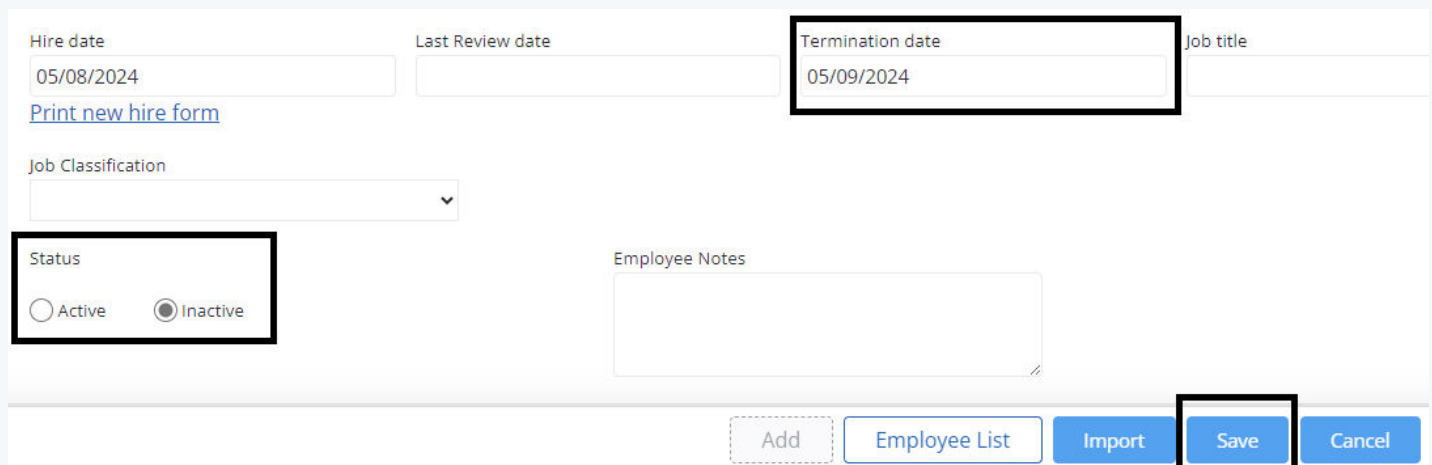
3. Select the **Employment** tab.



Employee Contractor < Redfield, Chris > Show Inactive

Contact Taxes **Employment** Compensation Deductions Direct Deposits PTO

4. On the **Employment** screen, add a **Termination date**, and set the employment **Status** to **Inactive**. Select **Save** at the bottom of the screen to finalize removal of the employee.



Hire date: 05/08/2024
Last Review date:
Termination date: 05/09/2024
Job title:
[Print new hire form](#)

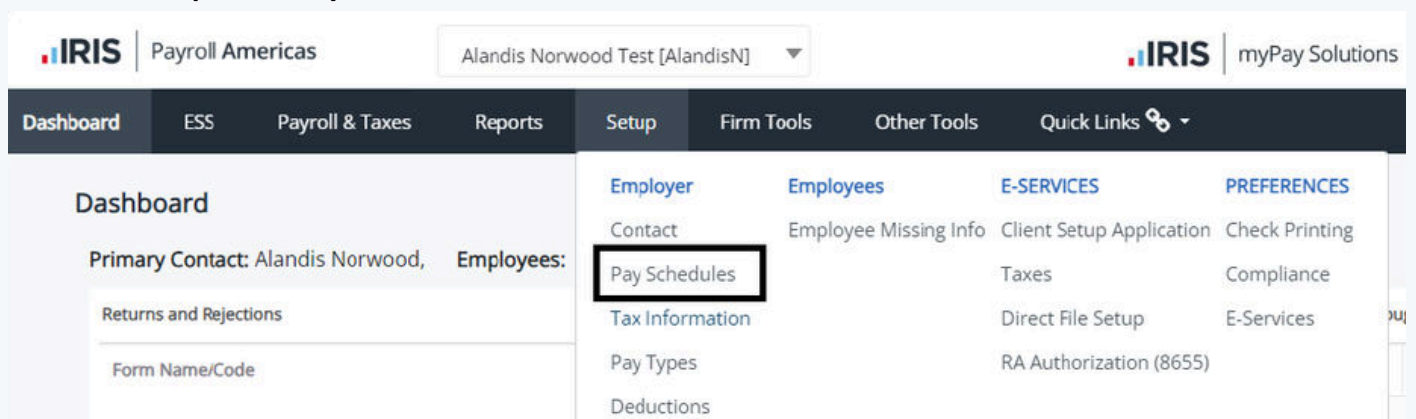
Job Classification:
Status: Active Inactive
Employee Notes:
Add Employee List Import Save Cancel

How do I Add or Modify a Payroll Schedule?

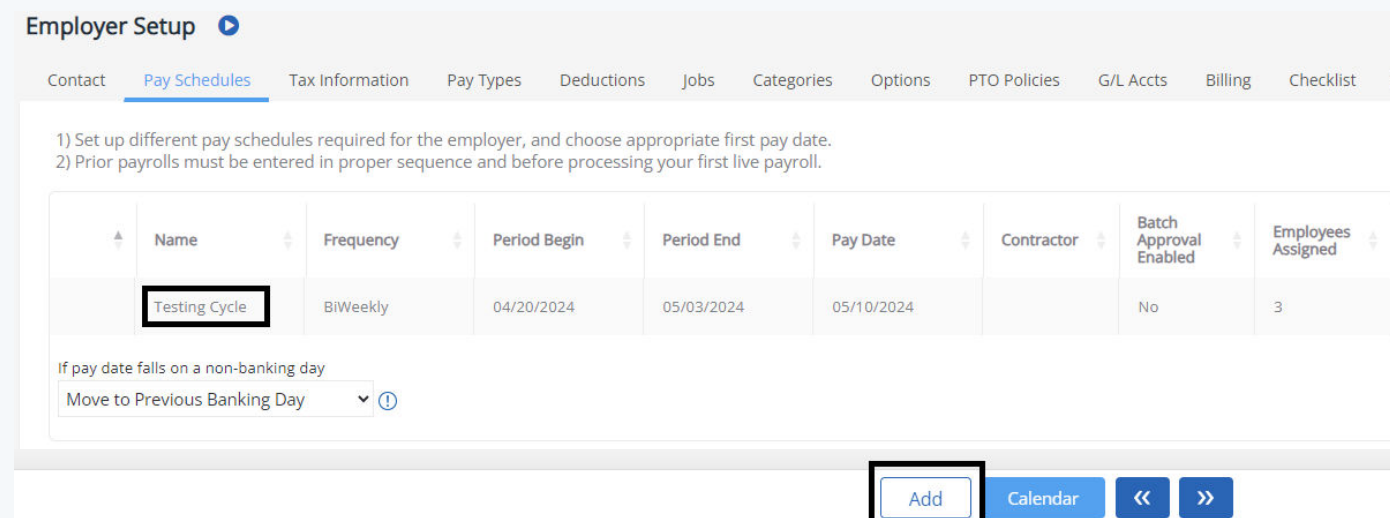
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



2. Select **Setup**, then **Pay Schedules**.



3. Select the payroll schedule you wish to modify OR select **Add** at the bottom of the screen to add a new payroll schedule.



Employer Setup

Contact Pay Schedules Tax Information Pay Types Deductions Jobs Categories Options PTO Policies G/L Accts Billing Checklist

1) Set up different pay schedules required for the employer, and choose appropriate first pay date.
2) Prior payrolls must be entered in proper sequence and before processing your first live payroll.

Name	Frequency	Period Begin	Period End	Pay Date	Contractor	Batch Approval Enabled	Employees Assigned
Testing Cycle	BiWeekly	04/20/2024	05/03/2024	05/10/2024		No	3

If pay date falls on a non-banking day
 Move to Previous Banking Day

Continued on next page...

How do I Add or Modify a Payroll Schedule? (continued)

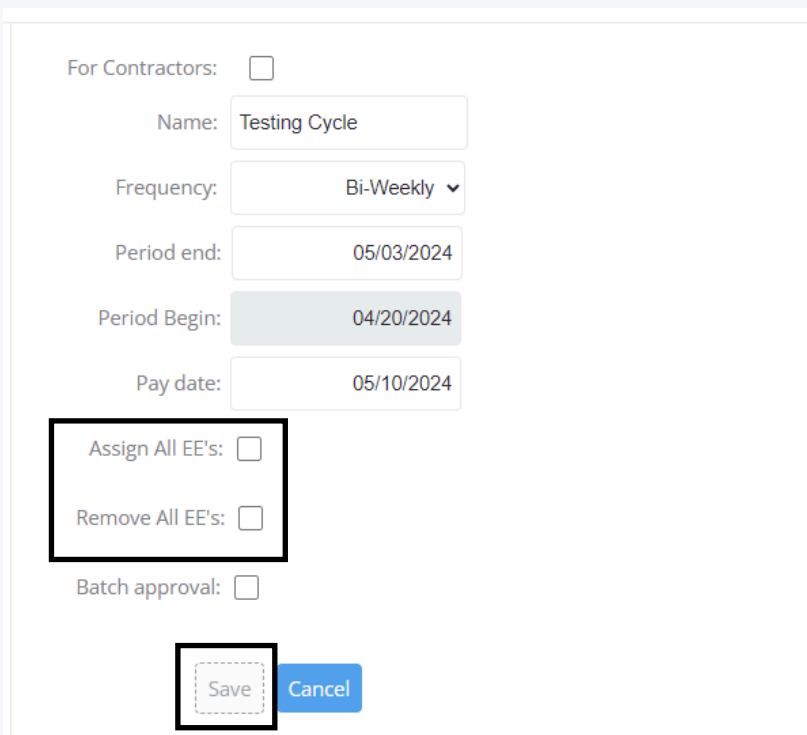
4. The options for the payroll schedule will pop up on the right-hand side of the screen.

Here you can name or rename the payroll schedule, change the frequency, change the pay period, and change the check date of the next/first payroll.

When making these adjustments, you also have the option to **Assign All** of your employees or **Remove All** of your employees from the pay schedule.

When creating a new payroll schedule, it's imperative that the appropriate employees are assigned.

Once the adjustments have been made, select **Save** to save your changes, or to add the new payroll schedule.



The screenshot shows a form for configuring a payroll schedule. It includes the following fields and options:

- For Contractors:**
- Name:**
- Frequency:** (dropdown menu)
- Period end:**
- Period Begin:**
- Pay date:**
- Assign All EE's:**
- Remove All EE's:**
- Batch approval:**
- Save** (button) and **Cancel** (button)

**Note: If you only wish to add certain employees to a new payroll schedule, you would do so on the Employee setup screen.*

How do I Add a Pay Item?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).

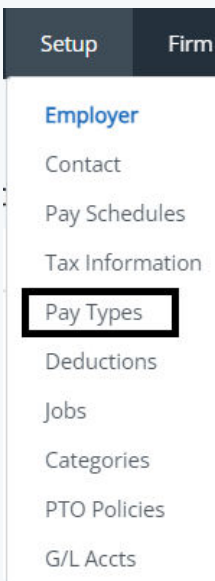


IRIS | Payroll Americas

SELECT EMPLOYER

Firm Tools Quick Links

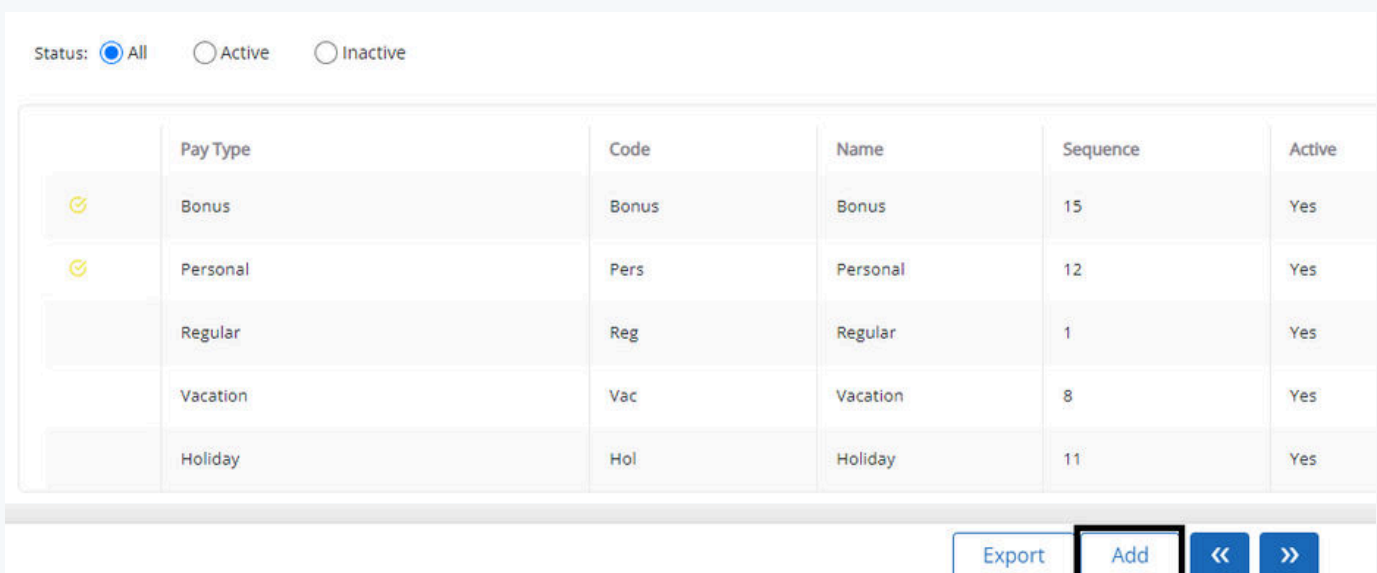
2. Select **Setup** and then **Pay Types**.



Setup Firm

- Employer
- Contact
- Pay Schedules
- Tax Information
- Pay Types**
- Deductions
- Jobs
- Categories
- PTO Policies
- G/L Accts

2. Select **Add** at the very bottom of the page.



Status: All Active Inactive

	Pay Type	Code	Name	Sequence	Active
	Bonus	Bonus	Bonus	15	Yes
	Personal	Pers	Personal	12	Yes
	Regular	Reg	Regular	1	Yes
	Vacation	Vac	Vacation	8	Yes
	Holiday	Hol	Holiday	11	Yes

Export Add << >>

Continued on next page...

How do I Add a Pay Item? (continued)

4. The **Pay Type** window will appear on the right side of your screen.

Click on the drop down menu to choose a **Pay Type** from the list.

- You can select a **Frequency** for how often this payroll item will be used.
- You can enter a **G/L Account** number.
- You can modify the **Code** and **Name** of the item on this screen as well.
- You may also add any **Notes** for this pay item.

Once you have entered in the required information, click the blue **Save** at the bottom of the screen.

Pay Type: ▼

Frequency: ▼

G/L Account:

Code:

Name:

Sequence:

Inactive Mark for deletion

Notes

5. The new pay item will now show in the list of **Pay Types**.

Status: All Active Inactive

	Pay Type	Code	Name	Sequence	Active
<input checked="" type="checkbox"/>	Bonus	Bonus	Bonus	15	Yes
<input checked="" type="checkbox"/>	Personal	Pers	Personal	12	Yes
<input checked="" type="checkbox"/>	Commission	Comm	Commission	12	Yes
<input type="checkbox"/>	Regular	Reg	Regular	1	Yes
<input type="checkbox"/>	Vacation	Vac	Vacation	8	Yes

How do I Modify a Pay Item?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).

2. Select **Setup** and then **Pay Types**.

3. Click on the row of the **Pay Type** you want to edit and the **Pay Type** window will appear on the right side of your screen.

Here you can modify the Frequency, G/L Account, Code, Name, or add Notes.

You can also **Mark it for deletion** or **Inactivate** it if you wish to remove it from the available Pay Types. Once you are done making changes, click the blue **Save** button.

Pay Type	Code	Name	Sequence	Active
Regular	Reg	Regular	1	Yes
Vacation	Vac	Vacation	8	Yes
Holiday	Hol	Holiday	11	Yes
Reimbursement	Reimb	Reimbursement	14	Yes

Pay Type: Reimbursement ▼

Frequency: Every Payroll ▼

G/L Account: 603

Code: Reimb

Name: Reimbursement

Sequence: 13

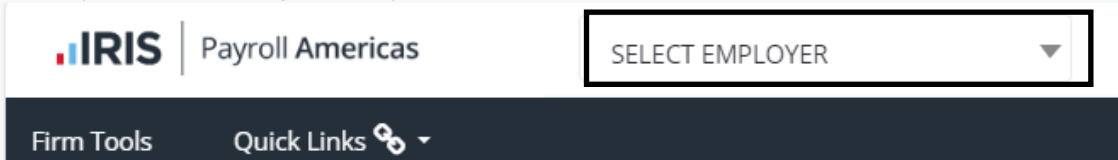
Inactive Mark for deletion

Notes

Save
Cancel

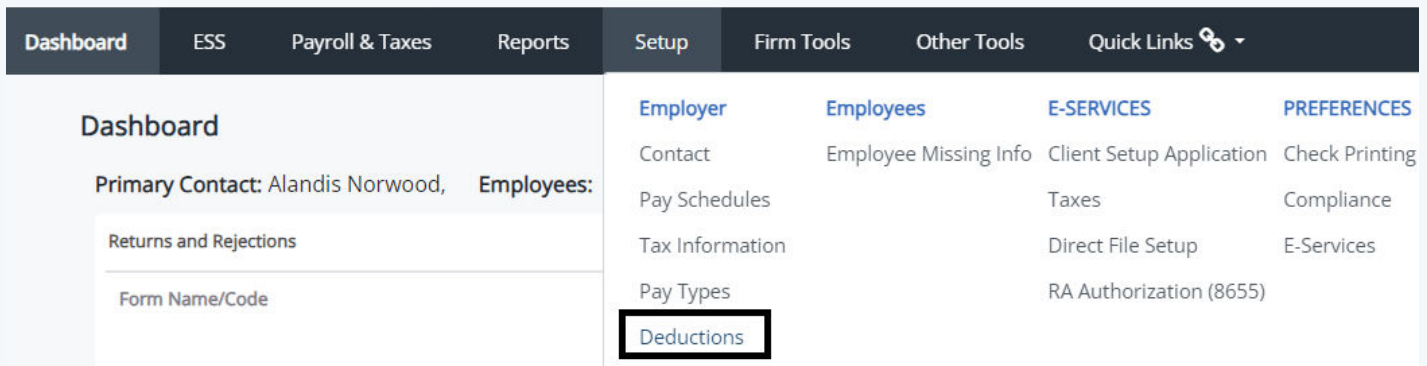
How do I Add or Modify a Payroll Deduction Item?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



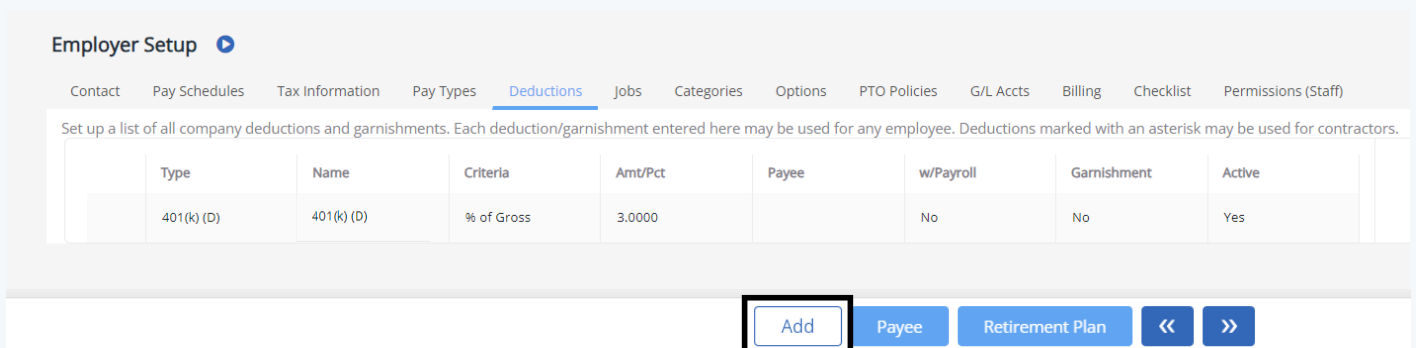
The screenshot shows the top navigation bar of the IRIS myPay Solutions interface. On the left is the IRIS logo and the text 'Payroll Americas'. To the right is a dropdown menu labeled 'SELECT EMPLOYER' with a downward arrow. Below this bar is a dark navigation bar with 'Firm Tools' and 'Quick Links' with a gear icon.

2. Select **Setup**, then **Deductions**



The screenshot shows the main navigation menu. The 'Setup' tab is selected and highlighted. Under the 'Setup' tab, the 'Deductions' option is highlighted with a red box. Other options under 'Setup' include 'Employer', 'Employees', 'E-SERVICES', and 'PREFERENCES'. The 'Dashboard' tab is also visible on the left side of the menu.

3. On the **Employer Setup** screen, select **Add** at the bottom.



The screenshot shows the 'Employer Setup' screen. The 'Deductions' tab is selected. Below the navigation tabs is a table with the following data:

Type	Name	Criteria	Amt/Pct	Payee	w/Payroll	Garnishment	Active
401(k) (D)	401(k) (D)	% of Gross	3.0000		No	No	Yes

At the bottom of the screen, there is a navigation bar with an 'Add' button highlighted by a red box, followed by 'Payee', 'Retirement Plan', and navigation arrows.

Continued on next page...

How do I Add or Modify a Payroll Deduction Item? (continued)

4. You will be presented with several options for the new **Deduction** item, such as the Name, Frequency, Amount, and Taxability.

Once you've selected the appropriate options, you have the option to **Apply deduction to all employees** by checking the corresponding box.

Once complete, select **Save** to add the deduction.

**Note: If you do not assign the deduction here, you will need to manually add the deduction to the relevant employees on the Employee setup screen.*

Type:

Name:

Frequency:

G/L Account:

Criteria:

Amt/Pct:

Payee:

Annual Limit:


Exempt: Fed FICA FUTA State SUTA

Local

Apply deduction to all employees Inactive

Mark for deletion

Weighted Allocation

Notes 

How do I Add or Modify a Payroll Deduction Item? (continued)

5. After clicking **Save**, the **Deduction item** will be sent to your Payroll Analyst for review and approval. Once it has been approved, the yellow pending icon will disappear, and it will be available for use.

Contact Pay Schedules Tax Information Pay Types **Deductions**

Set up a list of all company deductions and garnishments. Each deduction/garnishment entered

	Type	Name	Criteria	Amt/Pct	Paye
	401(k) for EE 50+ (D)	401(k) for EE 50+ (D)	% of Gross	0.0000	

6. If you would like to modify or remove an existing Deduction Item, go back to the **Deductions tab** on the **Employer Setup** screen and click on the Deduction in the list.

Employer Setup

Contact Pay Schedules Tax Information Pay Types **Deductions** Jobs Categories Options PTO Policies G/L Accts Billing Checklist Permiss

Set up a list of all company deductions and garnishments. Each deduction/garnishment entered here may be used for any employee. Deductions marked with an asterisk may be us

Type	Name	Criteria	Amt/Pct	Payee	w/Payroll	Garnishment	Active
401(k) (D)	401(k) (D)	% of Gross	3.0000		No	No	Yes

7. You can make adjustments to the Deduction Item on this screen. If you wish to delete it, check the **Mark for deletion** check box. Once complete, click **Save** at the bottom to send the modifications to your Payroll Analyst for approval.

Type: 401(k) (D)

Name: 401(k) (D)

Frequency: Every Payroll

G/L Account:

Criteria: % of Gross

Amt/Pct: 3.0000

Payee: -- Select--

Annual Limit: 0.00

Apply deduction to all employees Inactive

Mark for deletion


Weighted Allocation

[Exempt info](#)

Notes

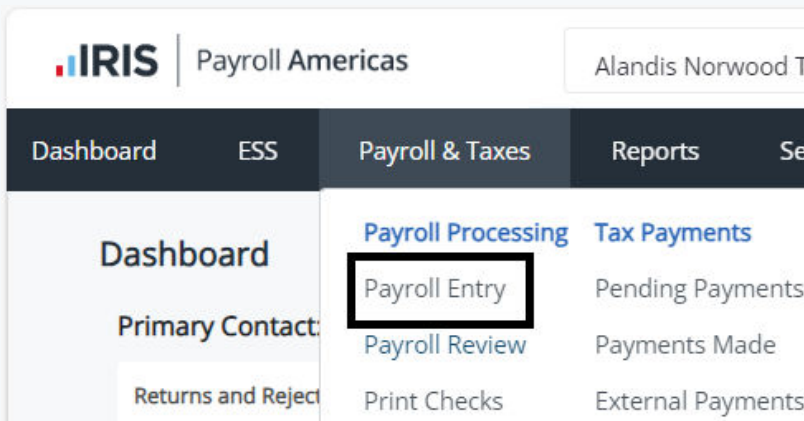
How do I Process a Payroll?

1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



The screenshot shows the top navigation bar of the IRIS Payroll Americas system. On the left is the IRIS logo. In the center, the text "Payroll Americas" is displayed. On the right, there is a dropdown menu with the text "SELECT EMPLOYER" and a downward arrow. Below this bar is a dark navigation menu with "Firm Tools" and "Quick Links" with a gear icon.

2. Select **Payroll & Taxes**, then **Payroll Entry**.



The screenshot shows the main navigation menu of the IRIS Payroll Americas system. The user is logged in as "Alandis Norwood T". The menu items are: Dashboard, ESS, Payroll & Taxes, Reports, and Settings. The "Payroll & Taxes" menu is expanded, showing sub-items: Payroll Processing, Tax Payments, Payroll Entry (highlighted with a red box), Payroll Review, Print Checks, Pending Payments, Payments Made, and External Payments.

3. In the drop-down list on the **Payroll Entry** screen, select the pay schedule you are entering. Confirm the pay period and pay date below.

Rapid view will be selected by default.

*Note: **Detail** view will only be available after inputting your payroll and selecting **Review**.

Payroll Entry

Select Payroll: Current Approved

Payroll Cycle1 Testing Cycle (5/24/2024) 

Grid Type: Rapid Detail

Standard Testing Cycle (Bi-Weekly) Payroll (#4) for Period 5/4/2024-5/17/2024 and Pay Date 05/24/2024

Continued on next page...

How do I Process a Payroll? (continued)

4. The employees will be listed in the grid below, and your pay items will appear as separate columns for data entry. This will allow you to manually enter their hours for the pay period.

Once complete, select the **Review** button at the bottom of the screen.

Employee Type: Filter: Select Department:

Employees

Pay <input type="checkbox"/>	EE #	Employee	Type	Regular	Vacation	Holiday	Reimburse	Hanc Chk	More
<input checked="" type="checkbox"/>	2	Jones, Tim	H	<input type="text" value="86.67"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	...
<input checked="" type="checkbox"/>	1	Smith, John L.	S	<input type="text" value="86.67"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	...

5. **The Payroll Review - Summary** page allows you to view final details regarding your payroll, including taxes and total costs to the employer.

Cost Of Payroll	
Federal W/H + FICA	\$994.52
State + Local W/H	\$212.50
Other Deductions	\$0.00
Direct Deposits	\$0.00
Net Checks	\$3,792.98
Total Gross Pay	\$5,000.00
FICA	\$72.50
FUTA	\$0.00
SUTA	\$0.00
Other Taxes	\$0.00
Total Employer Taxes	\$72.50
Total Cost Of Payroll	\$5,072.50

Continued on next page...

How do I Process a Payroll? (continued)

6. At the bottom of the **Payroll Review** screen you can click on the **Modify** button if you need to make additional changes to your payroll, including utilizing the **Detail** tab to make granular changes to a single employee at a time.

Select **Report** to generate your preprocessing report for review.

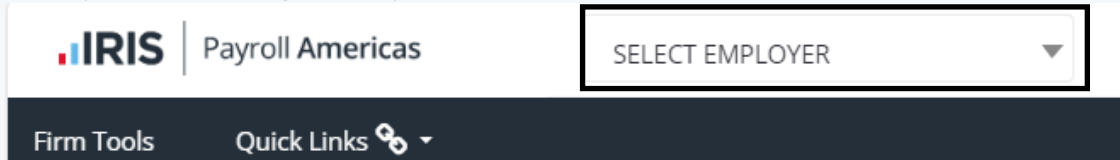
Click on the **Email** button to send PDF copies of the **Payroll Register Report** and **Change Report** to the Payroll Administrator and Secondary Payroll Administrator on file in the **Employer Setup**.

After you've reviewed the payroll and confirmed it be accurate, select **Approve** to finalize the payroll and submit it for processing.

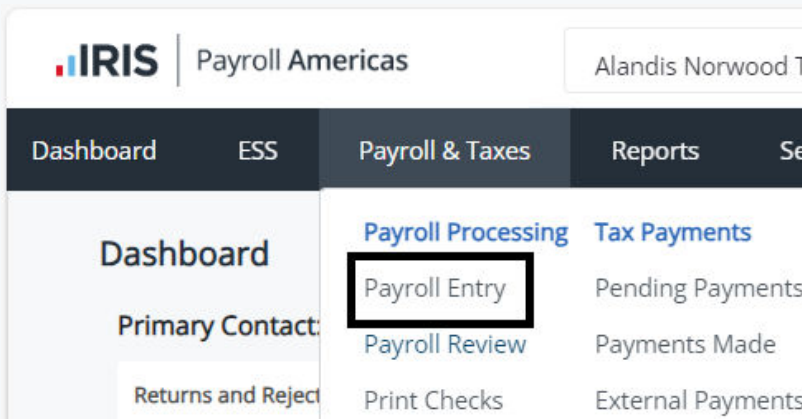


How do I Create an On-demand Payroll?

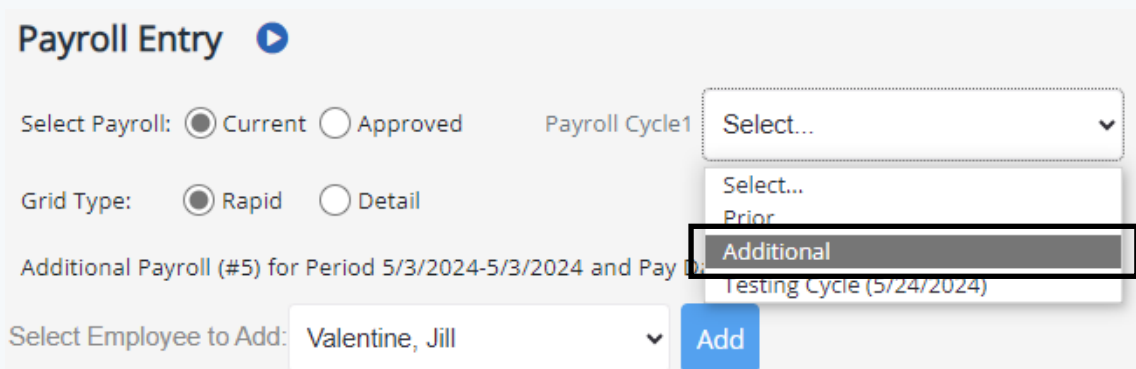
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



2. Select **Payroll & Taxes**, then **Payroll Entry**.



3. In the drop-down list on the **Payroll Entry** screen, select **Additional** payroll cycle.



Continued on next page...

How do I Create an On-demand Payroll? (continued)

4. In the **Payroll Options** pop-up menu, indicate the pay period start and end dates (if applicable) and the on-demand payroll check date.

Specify whether or not to **Disable PTO Accrual for this Payroll**.

Indicate the **Tax Method** you wish to apply to the on-demand payroll.

Choose whether standard deductions apply, only retirement contributions apply, or if no deductions apply to the payroll.

If you wish to add multiple employees at once to the on-demand payroll, you can use the **Add** button to add entire schedules or departments.

Select **Save** to finalize these options.

Payroll Options

Pay Period:	05/03/2024	-	05/03/2024
Pay Date:	05/03/2024		

PTO Accrual: Disable PTO Accrual for This Payroll

Tax Method: Employee Setup ▼

Deductions: Take All Take Retirement Only Take None

Set Holiday Hours:

Add Checks For: Pay Schedule ▼ Testing Cycle ▼

Continued on next page...

How do I Create an On-demand Payroll? (continued)

5. Use the drop-down menu to add employees to the on-demand payroll.

The employees will be listed in the grid below, and your pay items will appear as separate columns for data entry.

This will allow you to manually enter their hours for the pay period.

Once complete, select the **Review** button at the bottom of the screen.

Payroll Entry ▶

Select Payroll: Current Approved Payroll Cycle1: Additional (5/10/2024) ▼

Grid Type: Rapid Detail

Additional Payroll (#8) for Period 5/10/2024-5/10/2024 and Pay Date 05/10/2024

Select Employee to Add: Redfield, Chris ▼ **Add**

Employee Type: All ▼ **Apply Filter** **Payroll Change Report**

Pay <input type="checkbox"/>	EE #	Employee	Type	Regular	Vacation	Holiday	Reimburse	Sick	Hanc Chk	More
<input checked="" type="checkbox"/>	2	Valentine, Jill	S	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	...

Totals :

Upload **Review** Save Cancel

Continued on next page...

How do I Create an On-demand Payroll? (continued)

6. The **Payroll Review - Summary** page displays the final details regarding your payroll, including taxes and total costs to the employer.

At the bottom of the **Payroll Review** screen you can select **Modify** if you need to make additional changes to your payroll, including utilizing the **Detail** tab to make granular changes to a single employee at a time.

Select **Report** to generate your preprocessing report for review.

Click on the **Email** button to send PDF copies of the **Payroll Register Report** and **Change Report** to the Payroll Administrator and Secondary Payroll Administrator on file in the **Employer Setup**.

After you've reviewed the payroll and confirmed it be accurate, select **Approve** to finalize the payroll and submit it for processing.

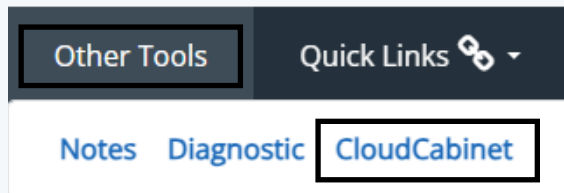


How do I View / Download Payroll Reports After a Payroll Processes?

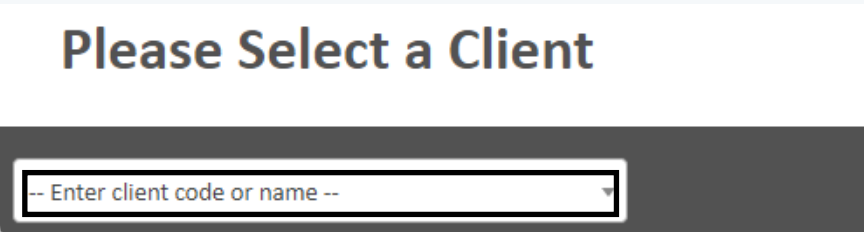
1. After logging into IRIS Payroll, select the button for **Cloud Cabinet** from the launch screen.



Note: You can also access Cloud Cabinet from IRIS Payroll by selecting **Other Tools > **CloudCabinet** from the menu options across the top of the screen.*



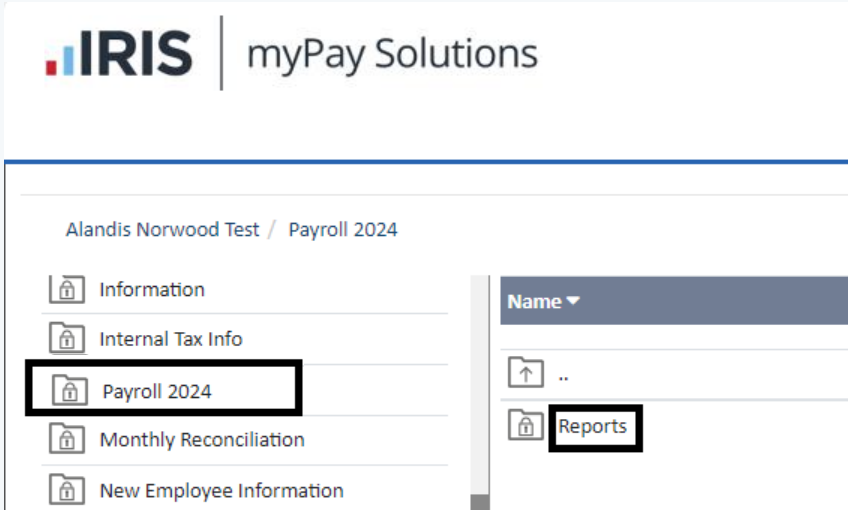
2. Select the desired client in the drop-down menu in the lower-left corner of the screen (only applicable to clients or referring accountants with multiple clients using IRIS Payroll).



Continued on next page...

How do I View / Download Payroll Reports After a Payroll Processes? (continued)

3. Select the **Payroll YYYY** folder of the corresponding year on the left-hand side, then select **Reports**.



4. Within the selected folder, click on the PDF file labeled with the date of the payroll you wish to review. From here, you can choose to download or print a copy of the reports for your records.

