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Getting Started with IRIS Payroll

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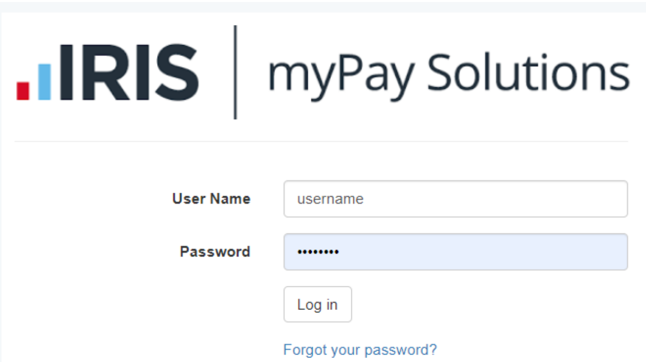
How do I create a login to myPay Solutions on IRIS Payroll?

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.

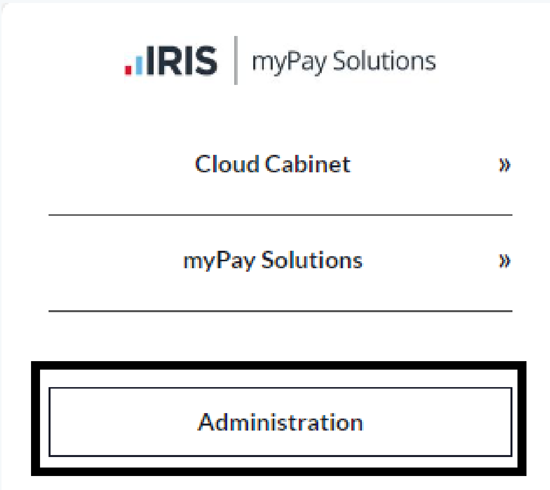
How do I login to myPay Solutions on IRIS Payroll?



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?

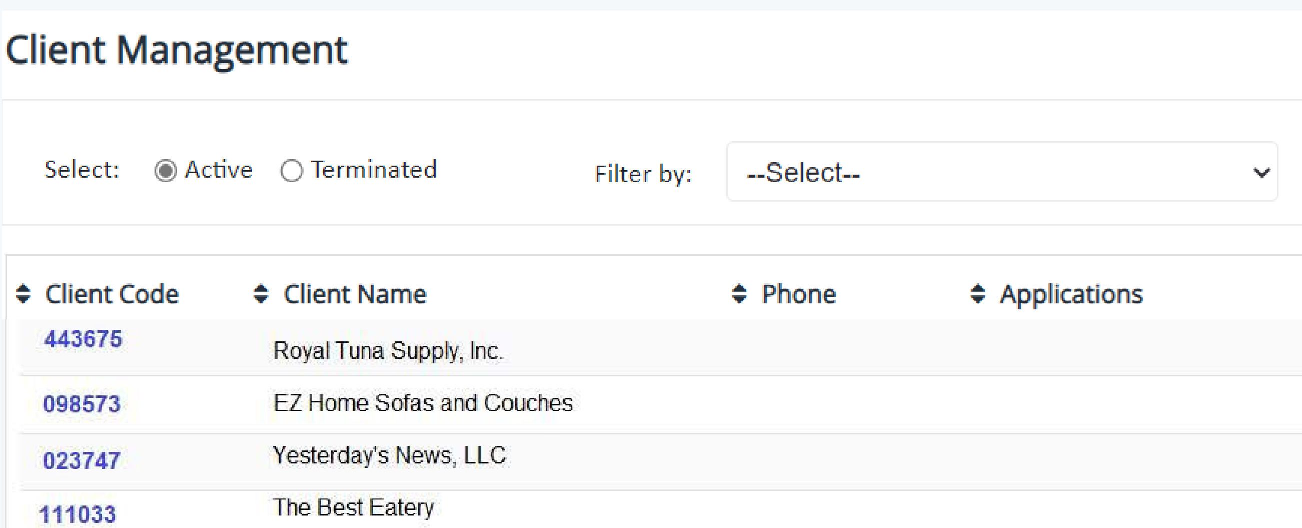
1. From the login screen, click **Administration**



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.



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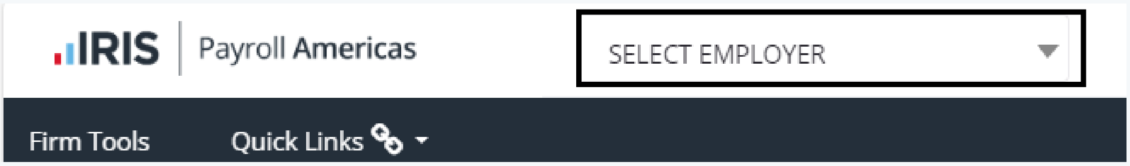
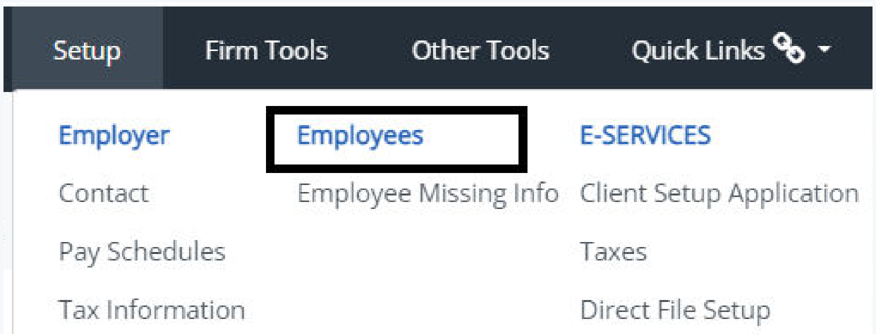
How do I Add Employees?

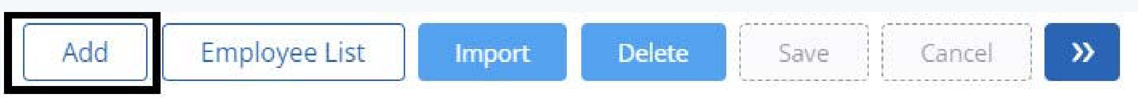
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



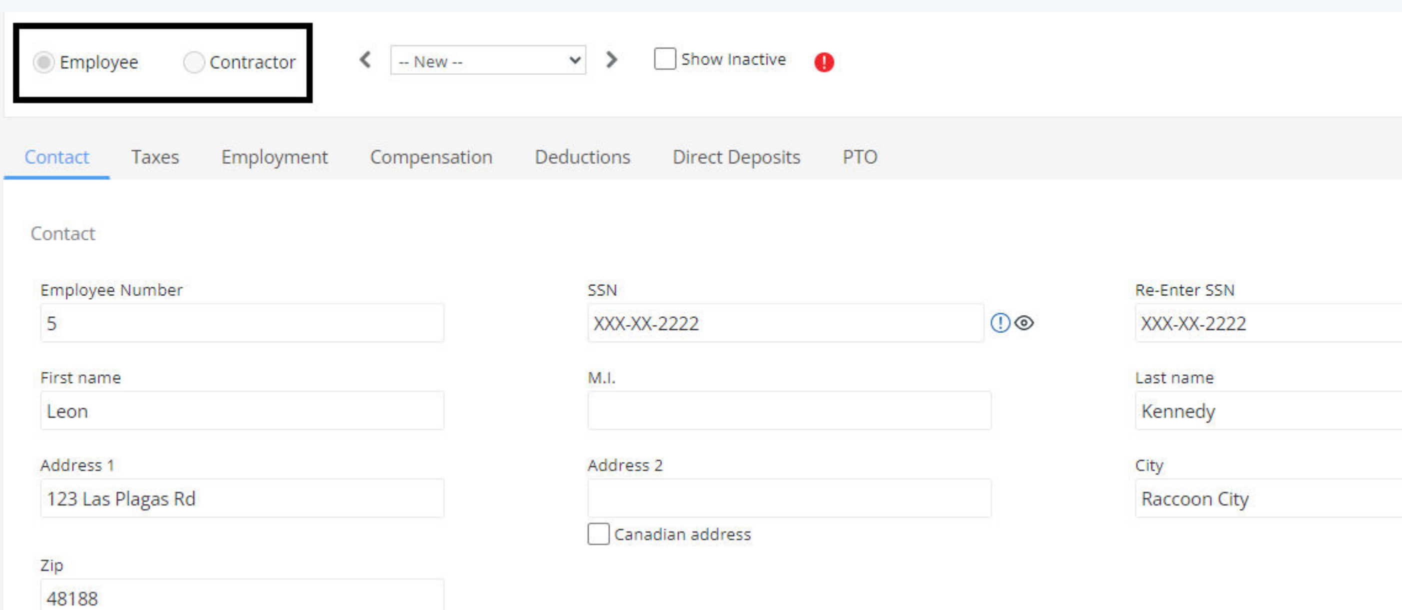
2. Select **Setup**, then **Employees**



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



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.

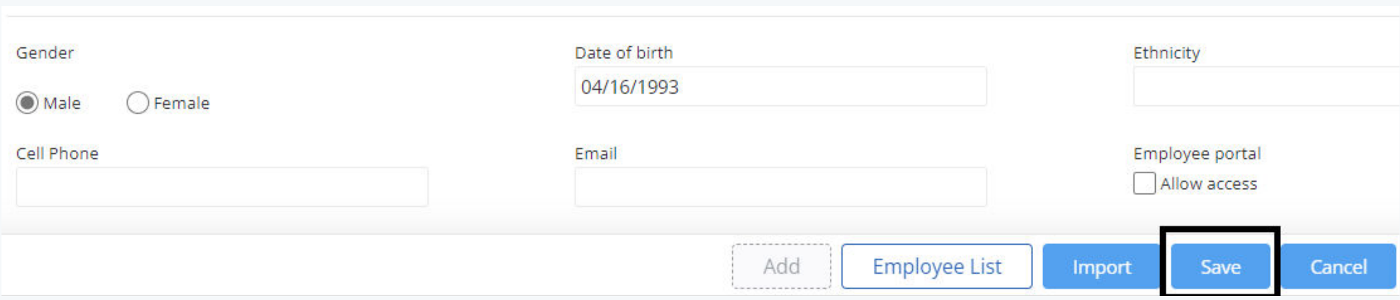


How do I Add Employees? (continued)

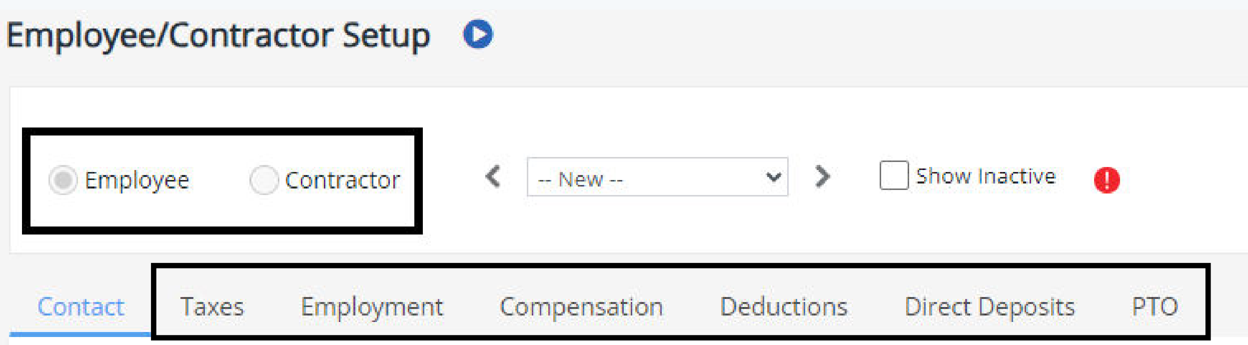
4. After entering the employee's demographic information, at the bottom of the Employee Setup screen is a check box to **Allow access** to an **Employee portal.**
This is where the employee retrieves copies of their pay stubs and year-end forms.
To create the **Employee portal**, add the employee's **Email address** and check the box to **Allow access**.

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

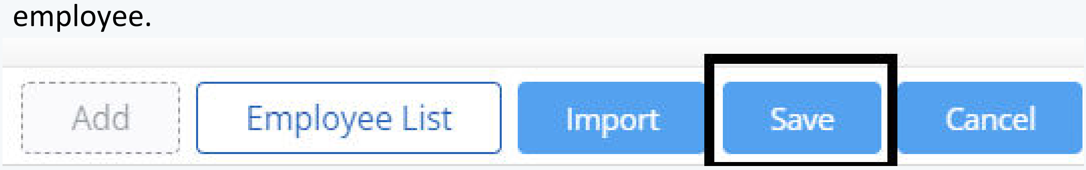
(If you've chosen to allow access to the **Employee portal**, clicking **Save** will send the employee an email with the link to register their account.)



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.



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



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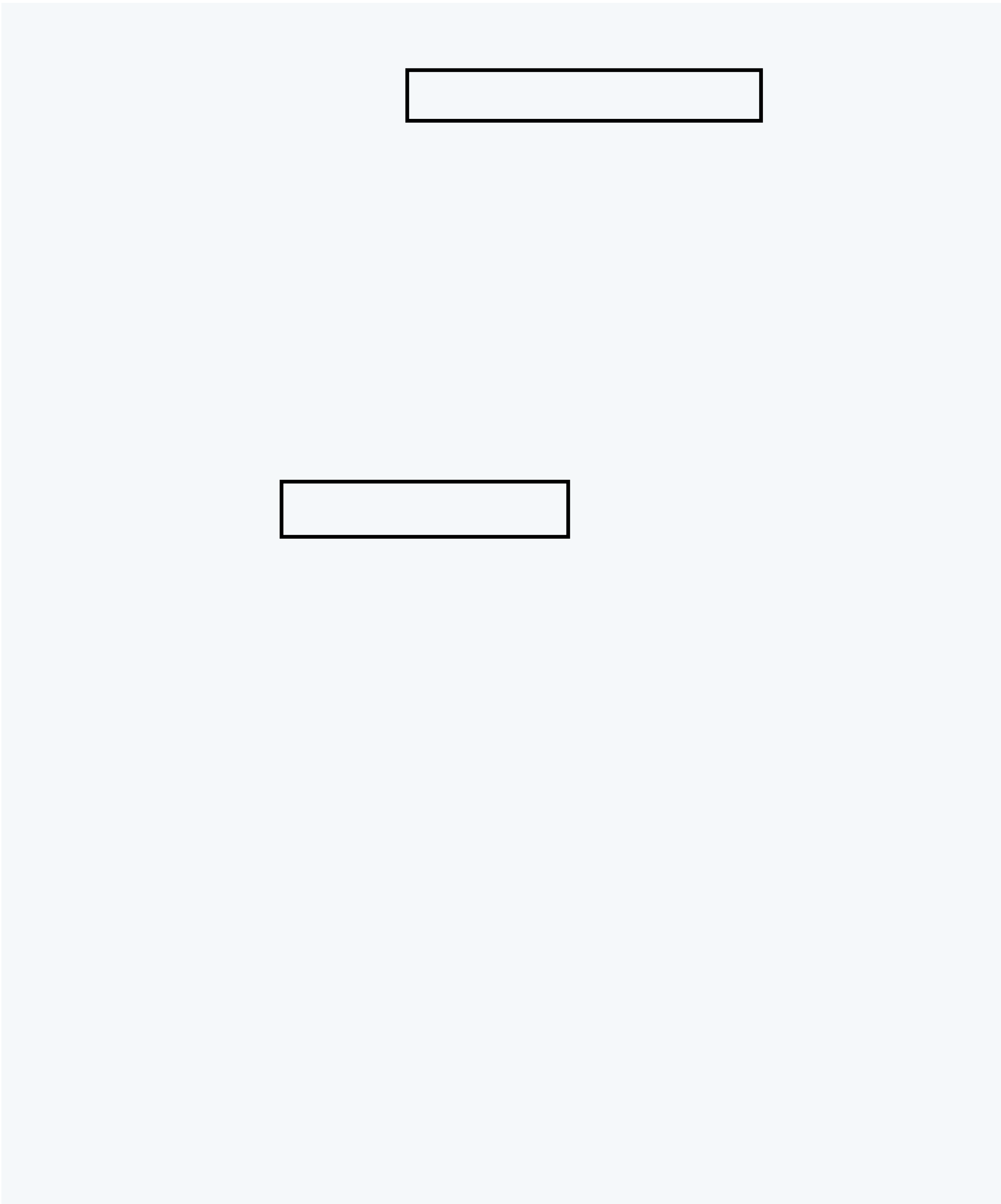
How do



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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

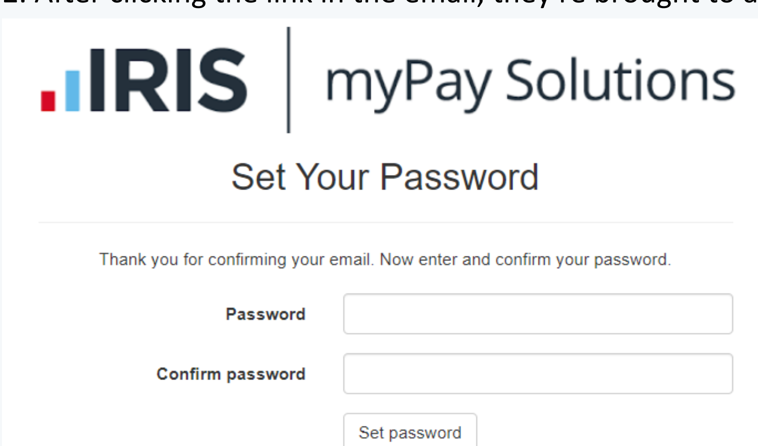
USERNAME: alberttest

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.

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

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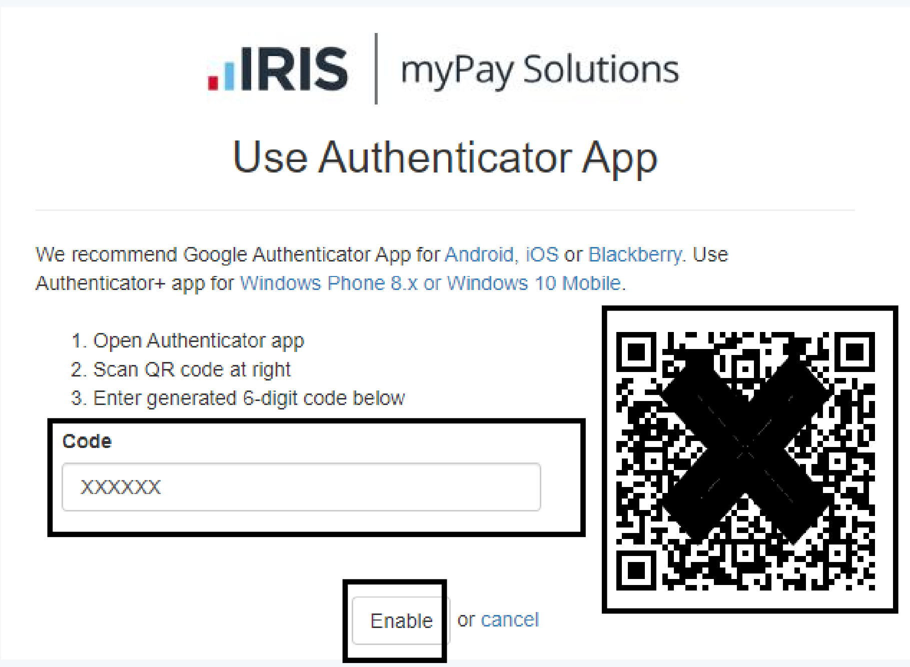
How do Employees Register Their Employee Portal? (continued)

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.

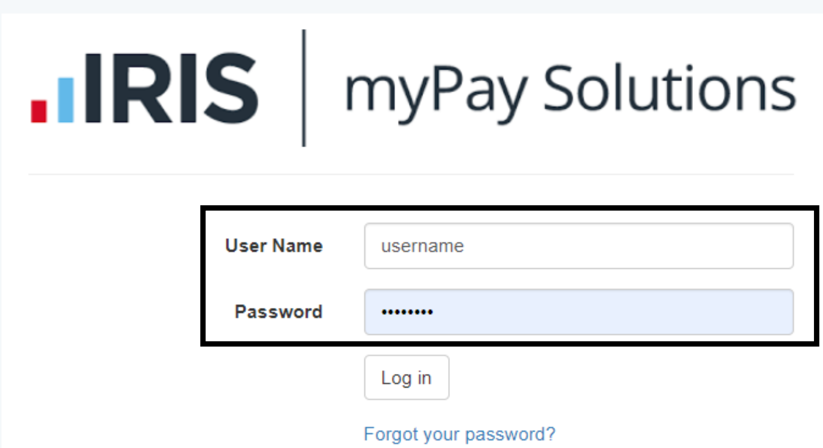
Usually this involves taking a picture of the unique QR code generated for them on screen, as in the example below.

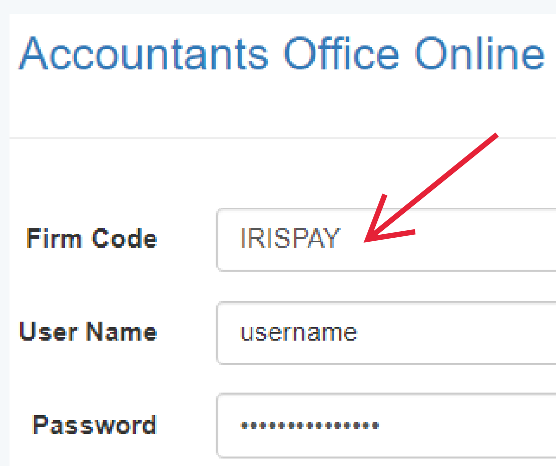
Once they have performed the steps required by their Authenticator App, they will be provided with a 6-digit code to enter on the screen. Click **Enable** to save.



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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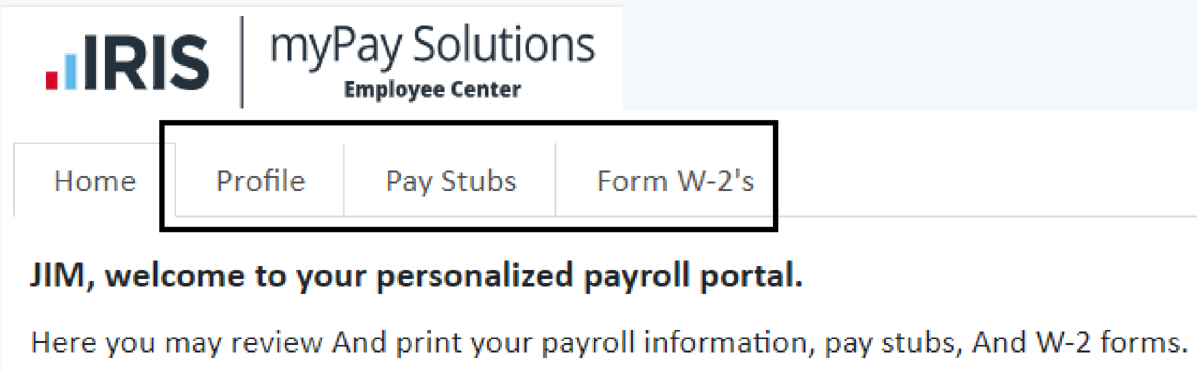
How do Employees Register Their Employee Portal? (continued)

7. After the employee logins 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.



**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

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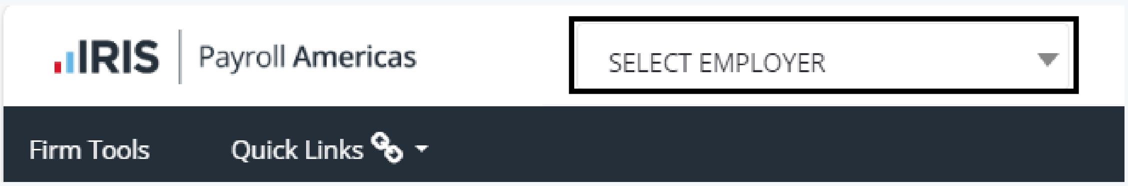
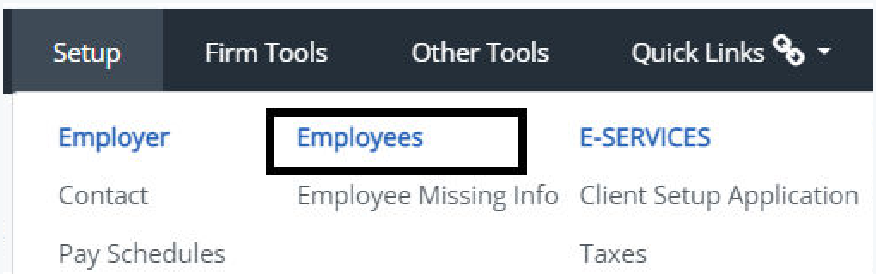
How do I Resend an Employee Portal Registration or Password Reset Email?

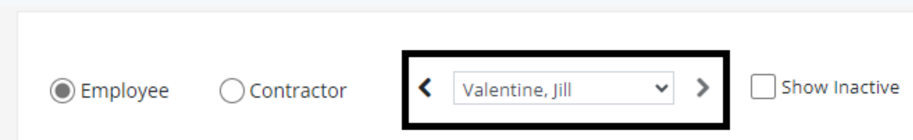
1. Employees can reset their passwords by clicking on the **Forgot your password?** link on the login screen. As an administrator, you also have the ability to send the Reset Password Email or Resend Employee Portal Registration Email depending on if they've registered their Employee portal or not.
To 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).



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



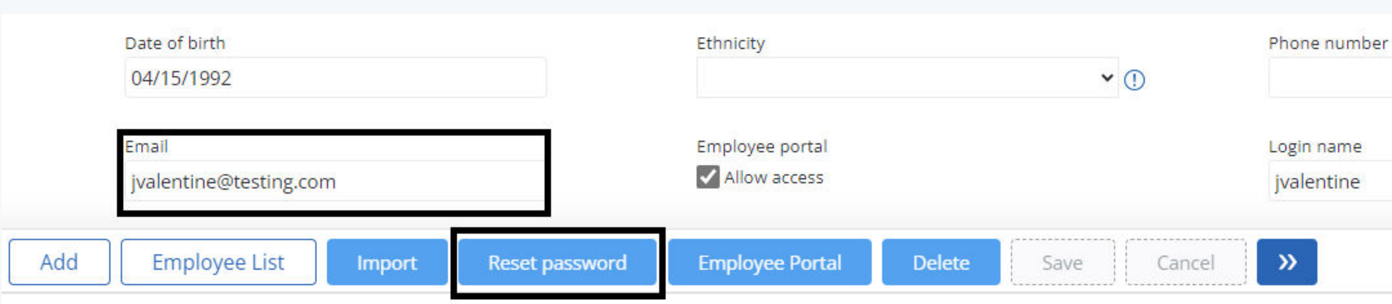
3. In the drop-down list, select the employee you wish to send the registration/password reset email to.



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

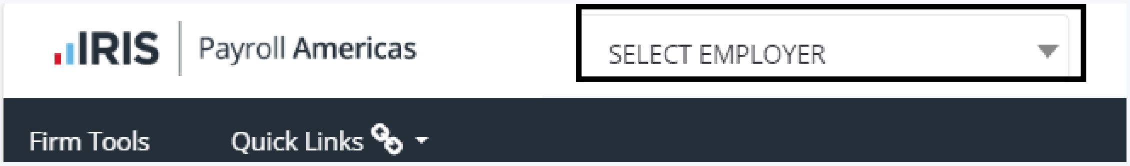
On the bottom of this screen, verify that the email address is correct for the employee, then click on the **Reset password** button.

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.

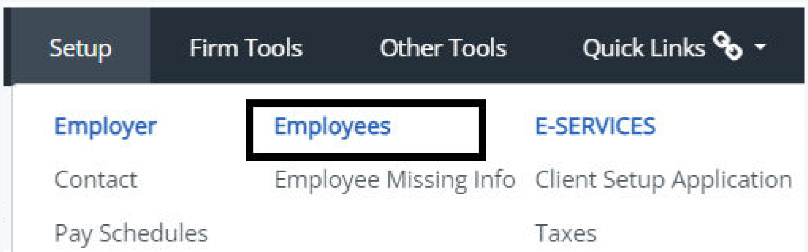


How do I Modify Employee Pay Rates?

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).

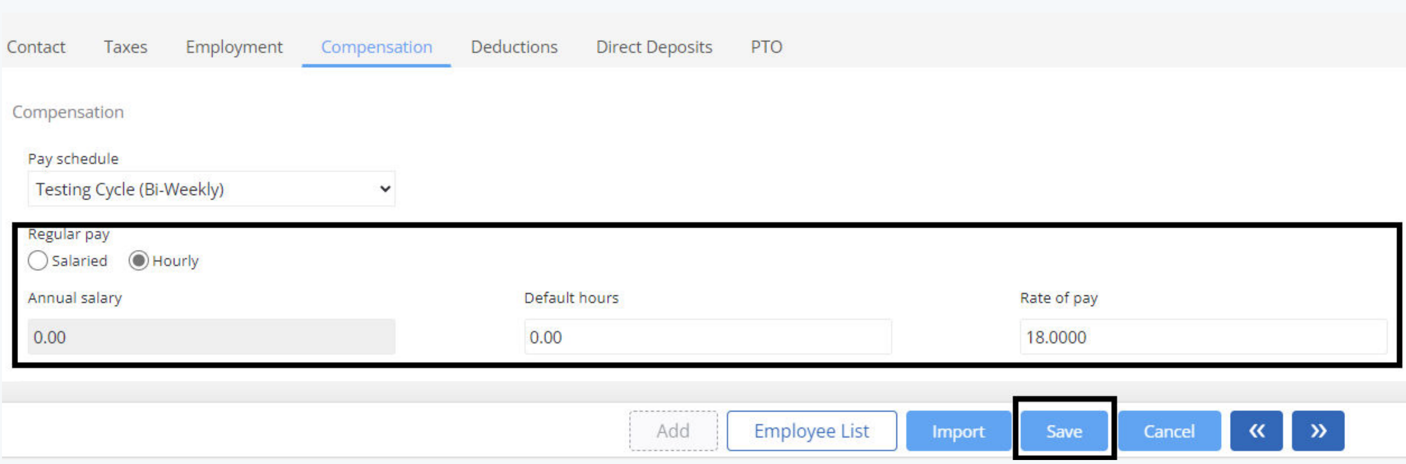


2. Select **Setup**, then **Employees**



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.*



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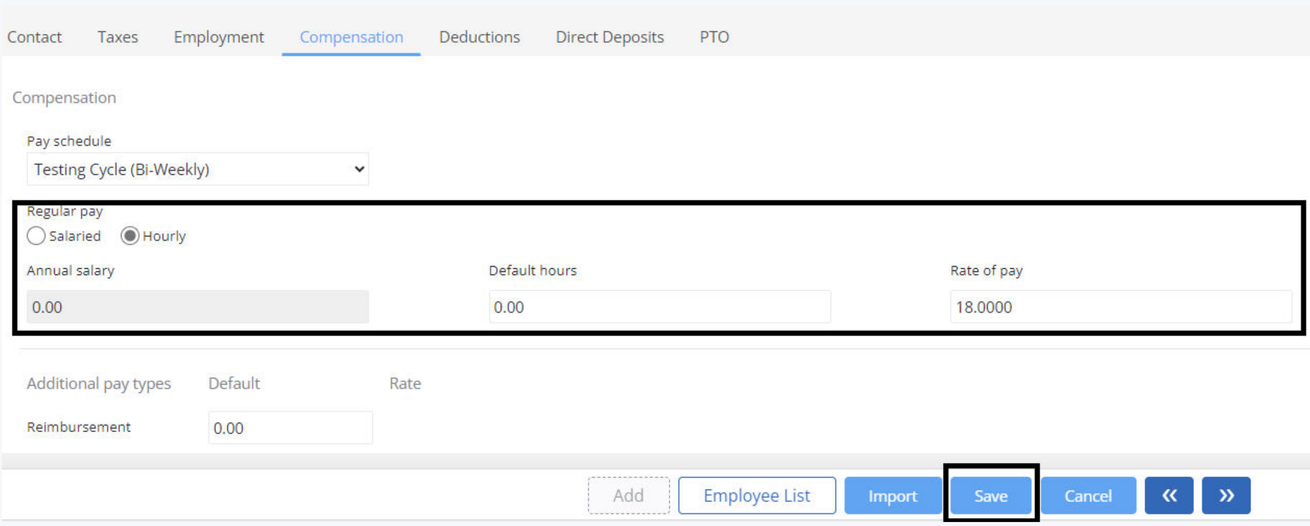
How do I Modify Employee Pay Rates? (continued)

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.

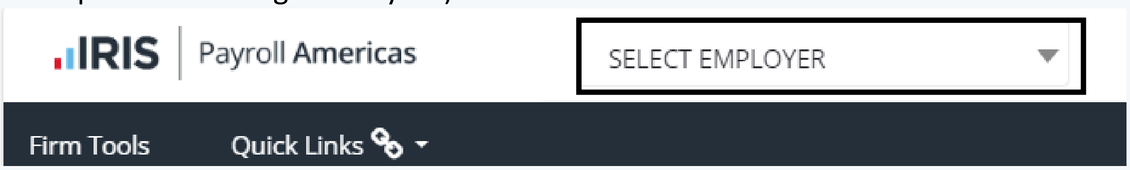
Once you've made your adjustment, select **Save** at the bottom of the screen.

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

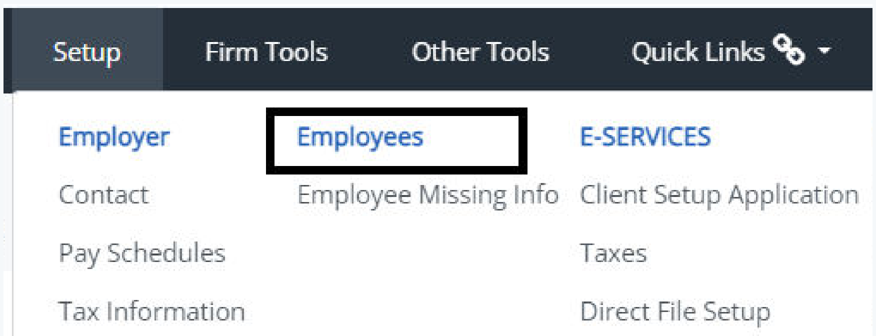


How do I Remove Employees?

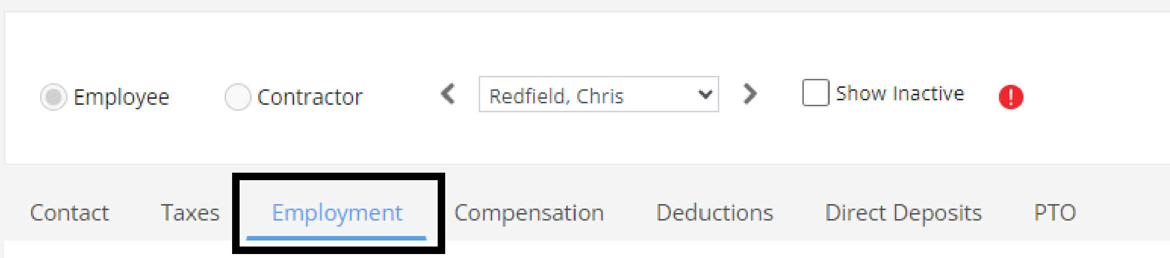
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



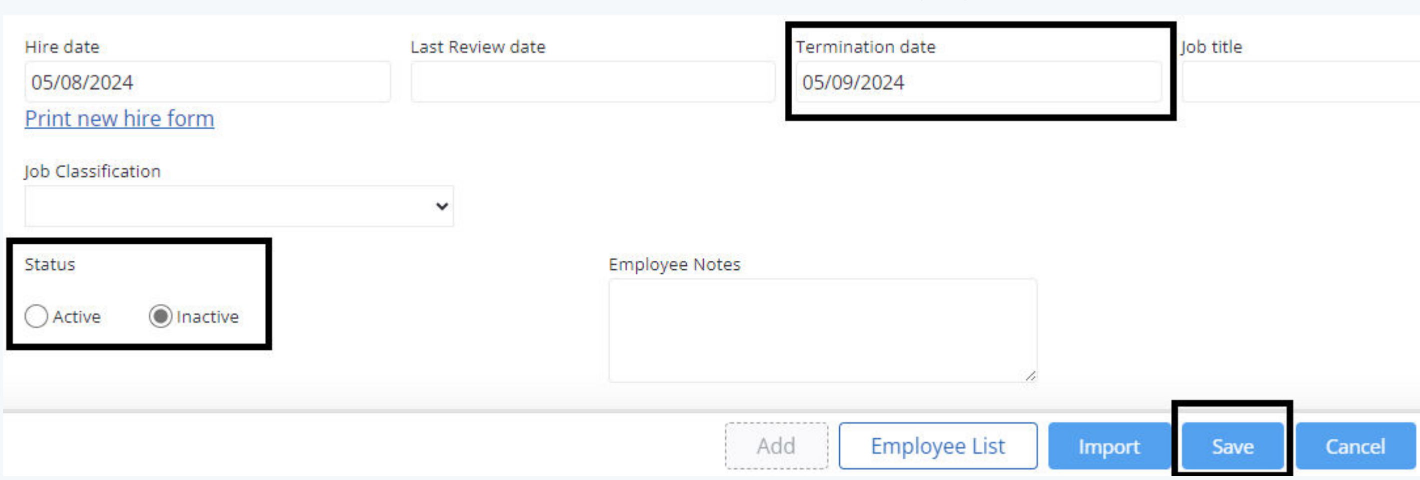
2. Select **Setup**, then **Employees**



3. Select the **Employment** tab.

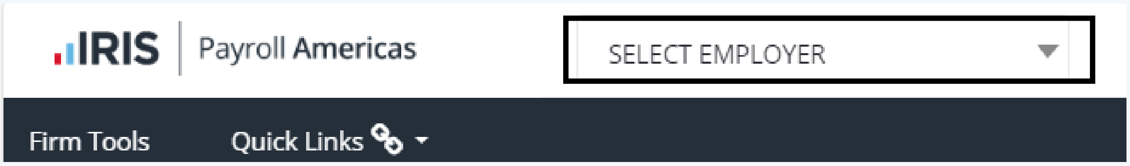


4. On the **Employment** screen, add a **Termination date**, and set the employment **Status** to **Inactive**. Select **Save** at the bottom of the screen to finalize removal of the employee.

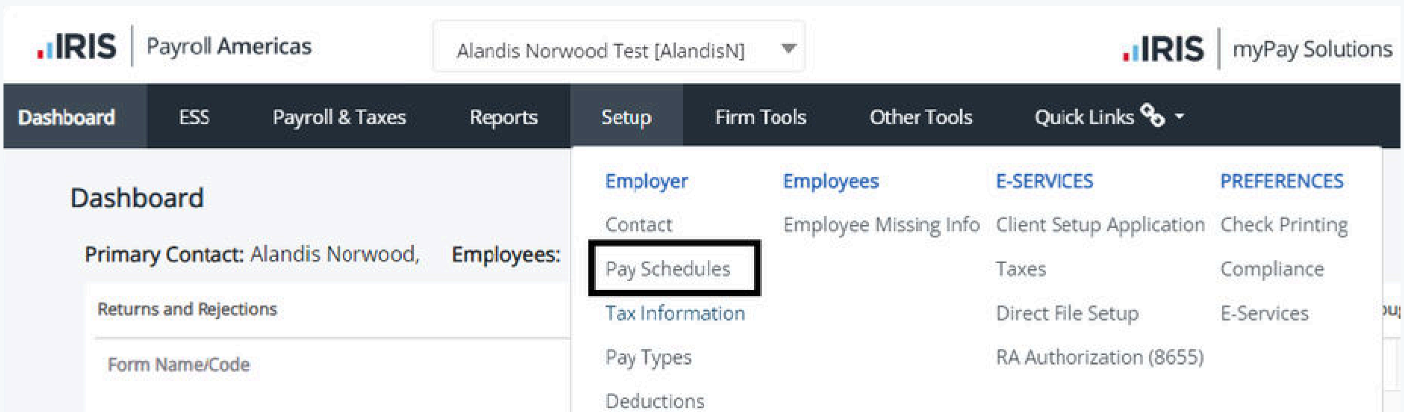


How do I Add or Modify a Payroll Schedule?

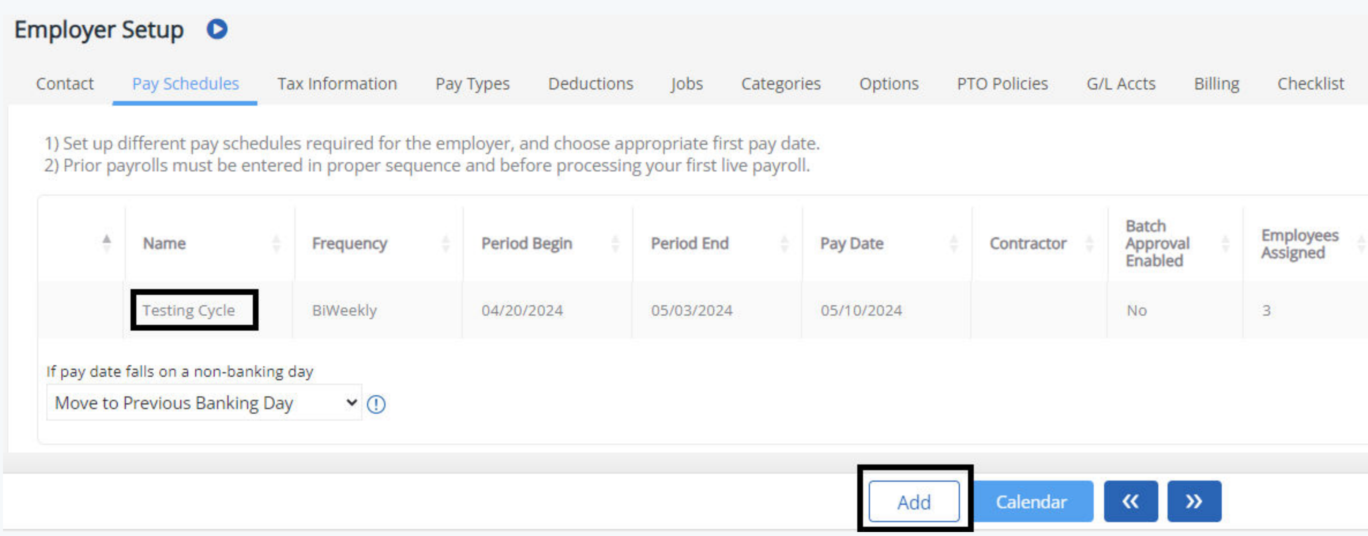
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



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.



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

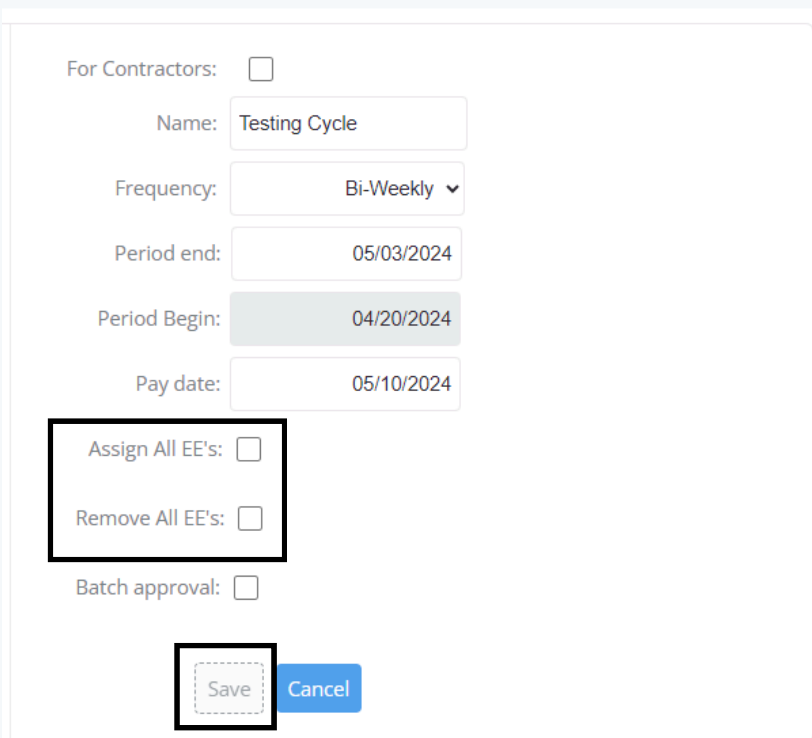
4. The options for the payroll schedule will pop up on the right-hand side of the screen.

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.



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

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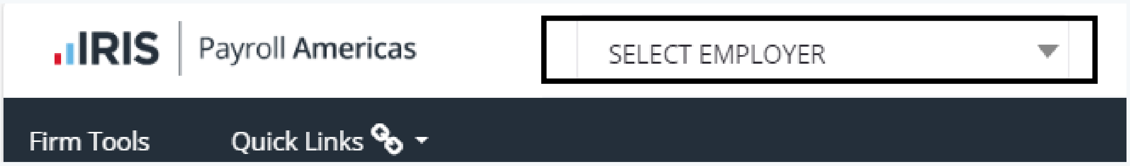
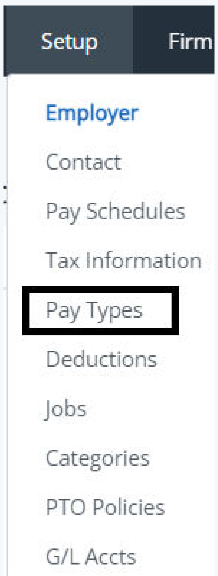
How do I Add a Pay Item?

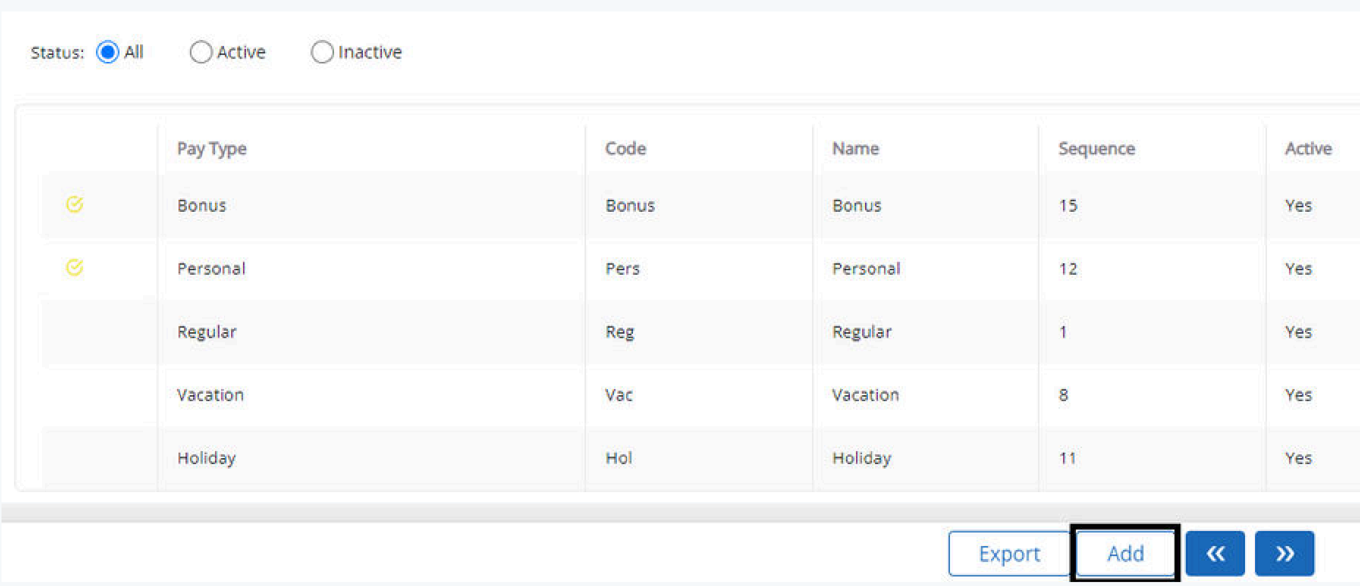
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



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



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



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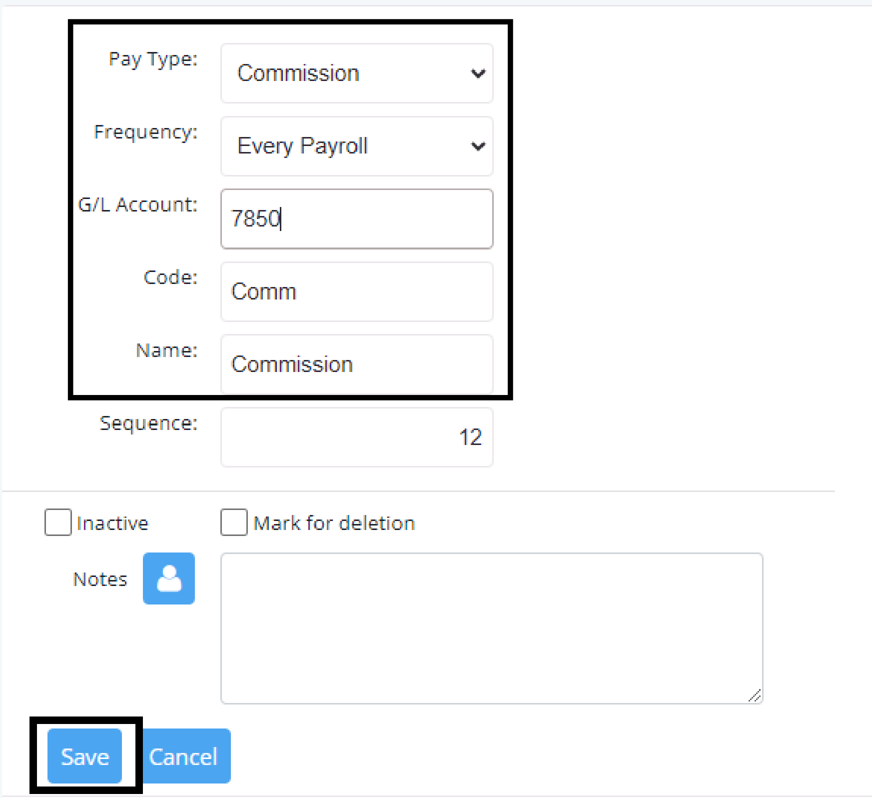
How do I Add a Pay Item? (continued)

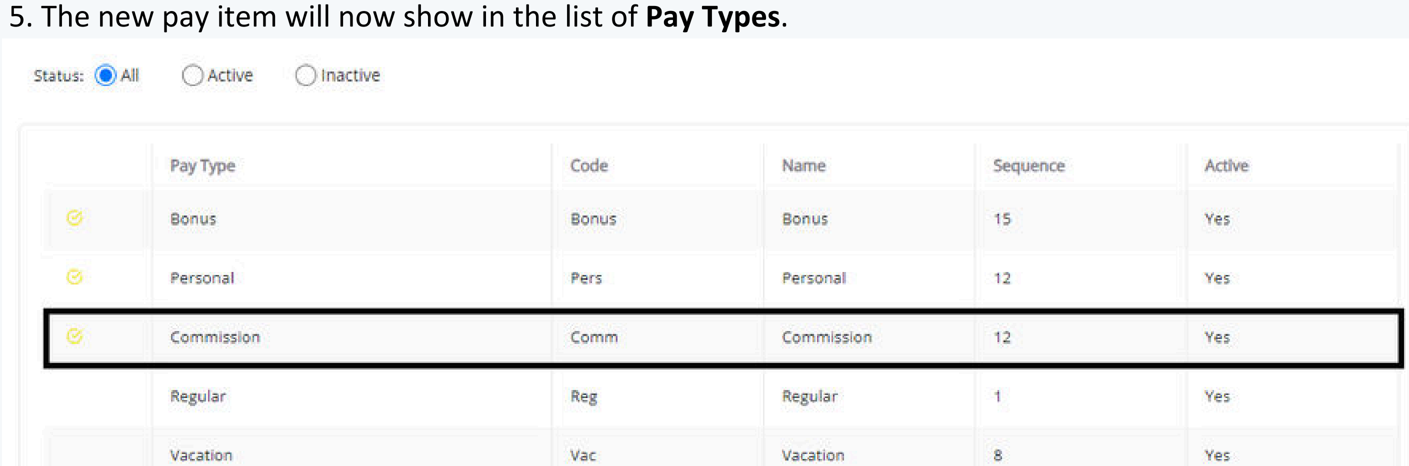
4. The **Pay Type** window will appear on the right side of your screen.
Click on the drop down menu to choose a **Pay Type** from the list.

- 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.



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



Status: All Active Inactive

	Pay Type	Code	Name	Sequence	Active
	Bonus	Bonus	Bonus	15	Yes
	Personal	Pers	Personal	12	Yes
	Commission	Comm	Commission	12	Yes
	Regular	Reg	Regular	1	Yes
	Vacation	Vac	Vacation	8	Yes

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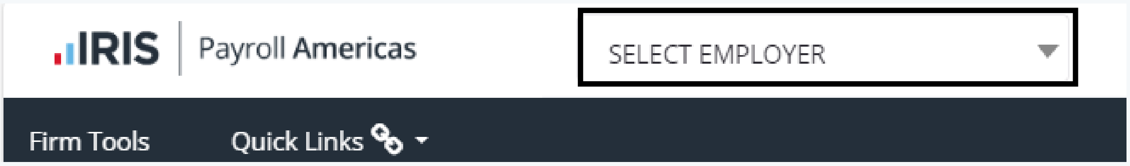
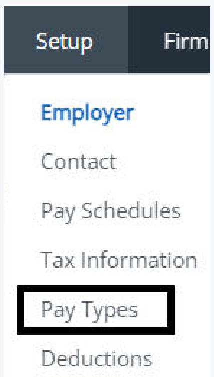
How do I Modify a Pay Item?

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).



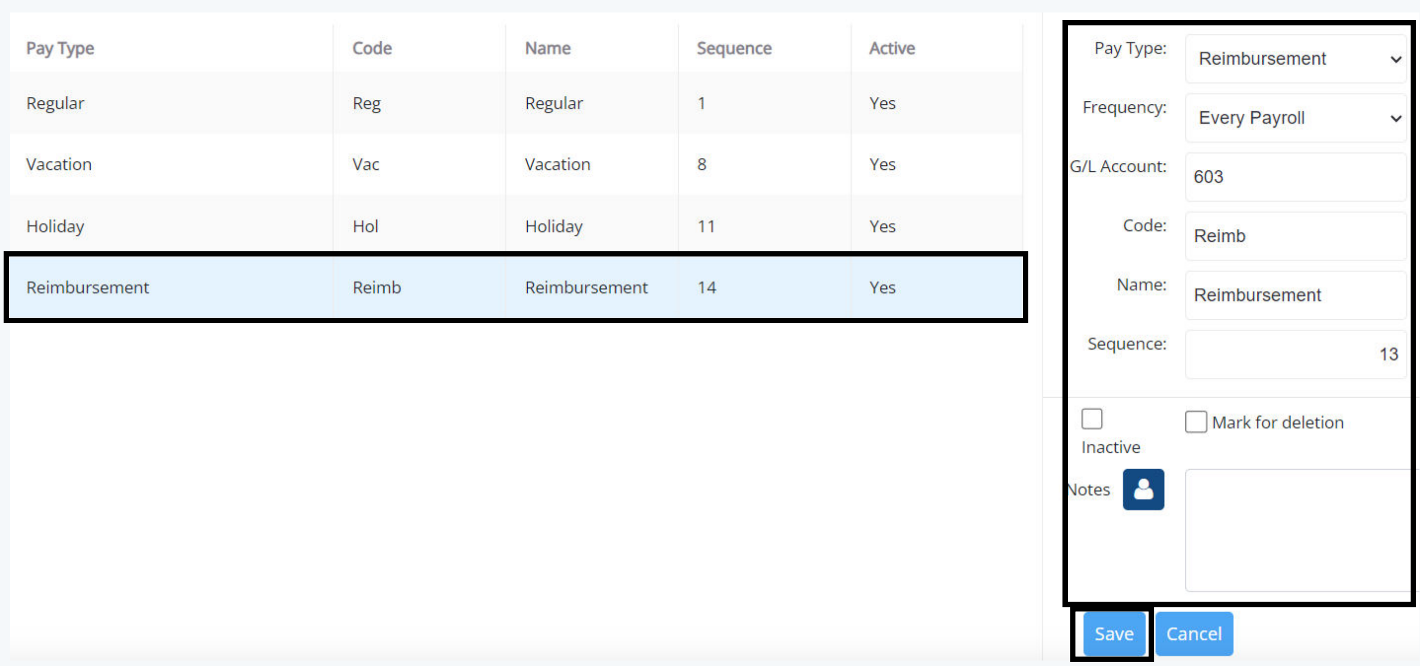
2. Select **Setup** and then **Pay Types**.



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.

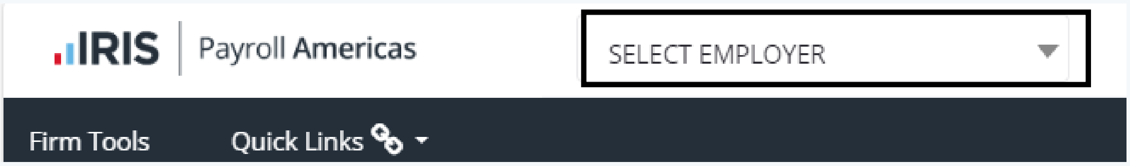
Here you can modify the Frequency, G/L Account, Code, Name, or add Notes.

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.

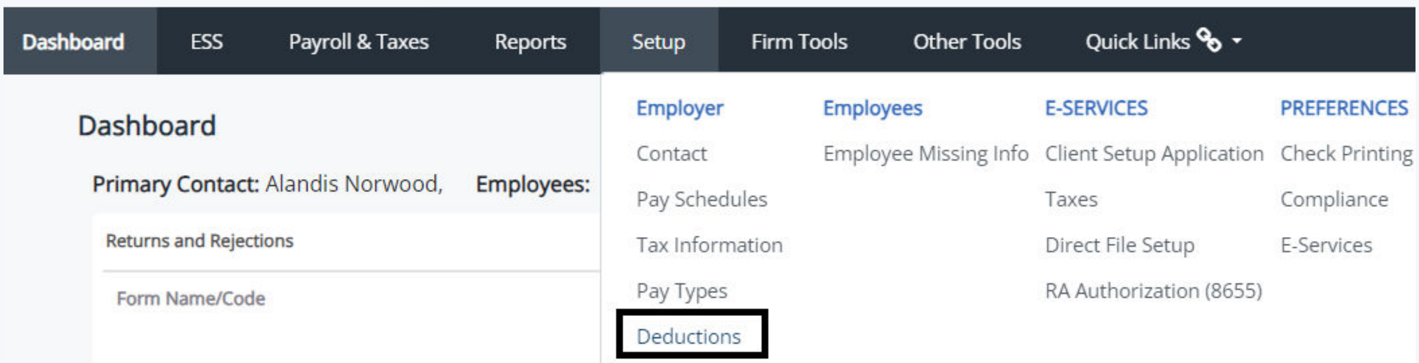


How do I Add or Modify a Payroll Deduction Item?

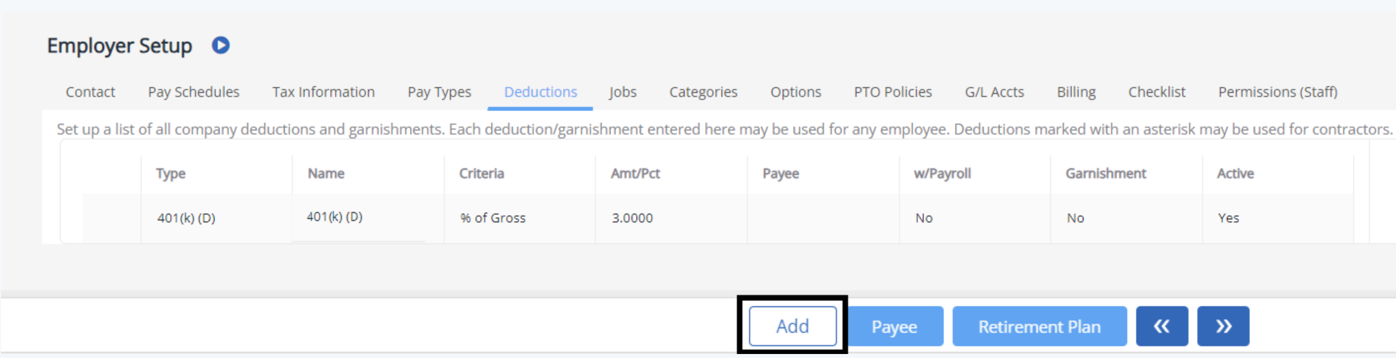
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



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



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



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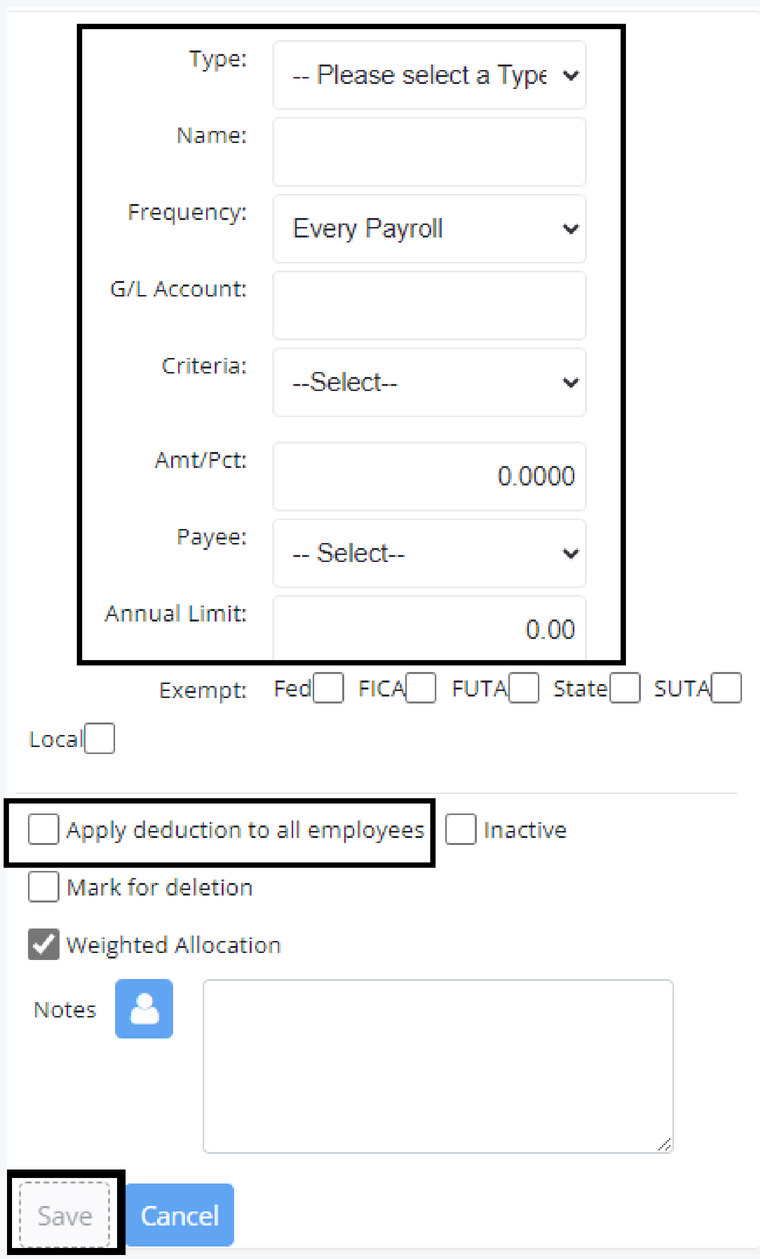
How do I Add or Modify a Payroll Deduction Item? (continued)

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.*



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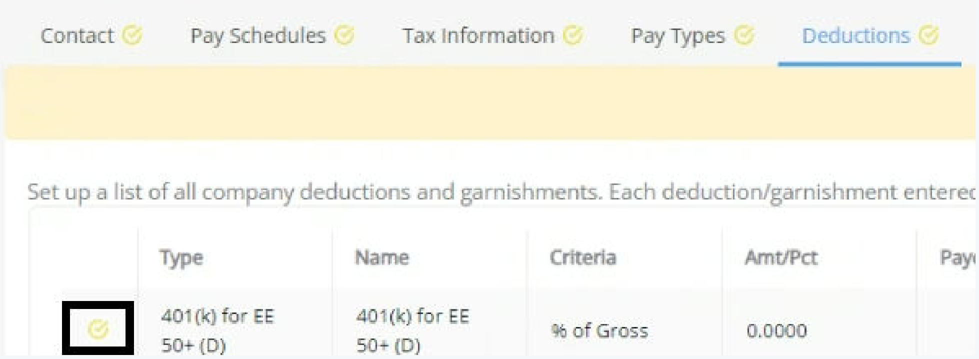
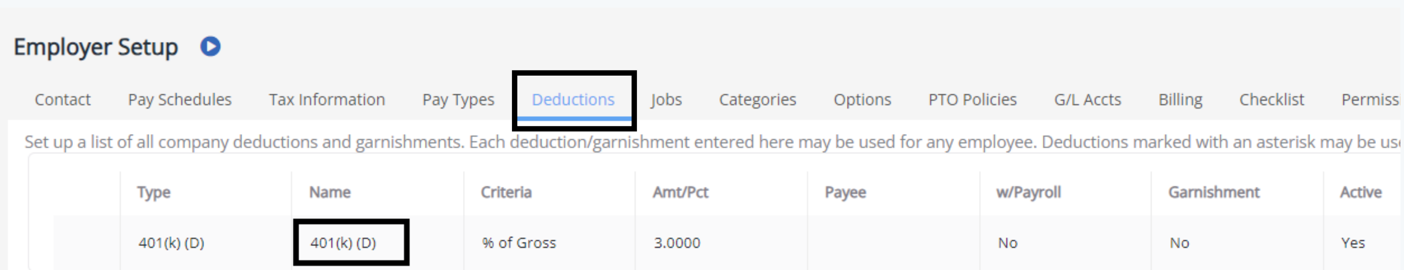
How do I Add or Modify a Payroll Deduction Item? (continued)

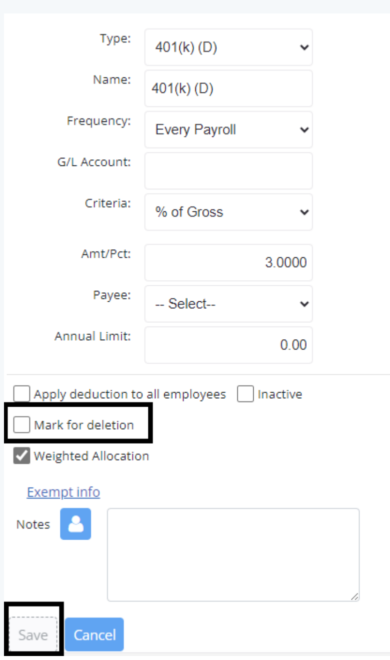
5. After clicking **Save**, the **Deduction item** will be sent to your Payroll Analyst for review and approval. Once it has been approved, the yellow pending icon will disappear, and it will be available for use.



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.

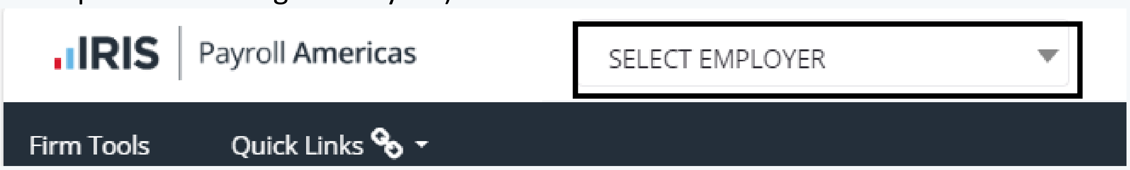


7. You can make adjustments to the Deduction Item on this screen.
If you wish to delete it, check the **Mark for deletion** check box.
Once complete, click **Save** at the bottom to send the modifications to your Payroll Analyst for approval.

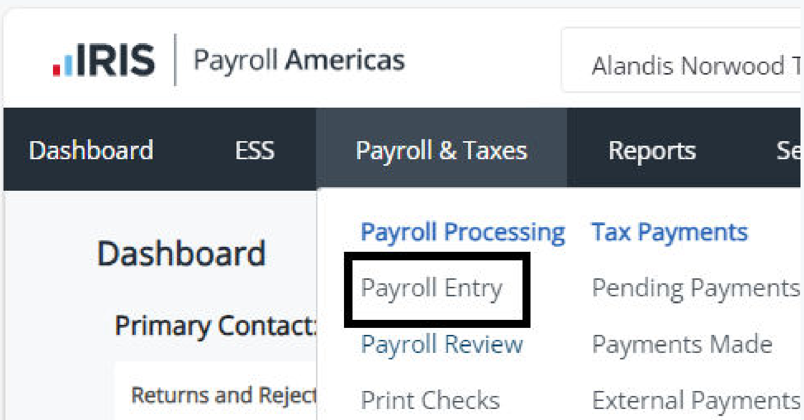


How do I Process a Payroll?

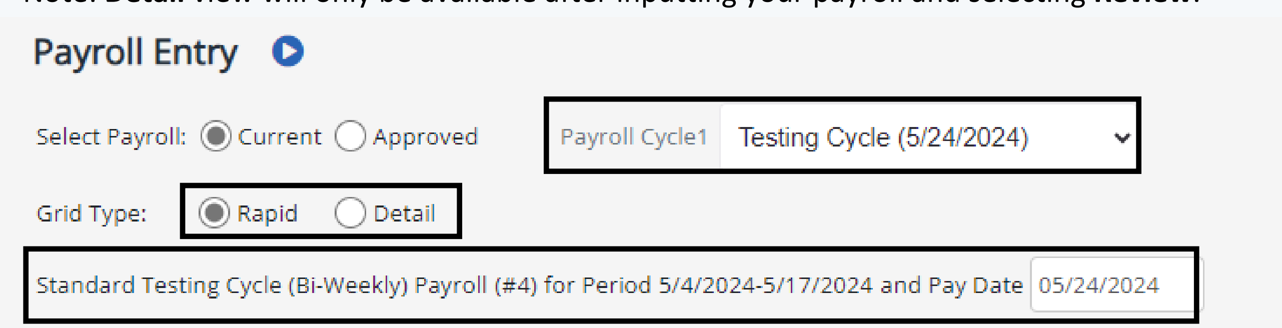
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



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



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**.



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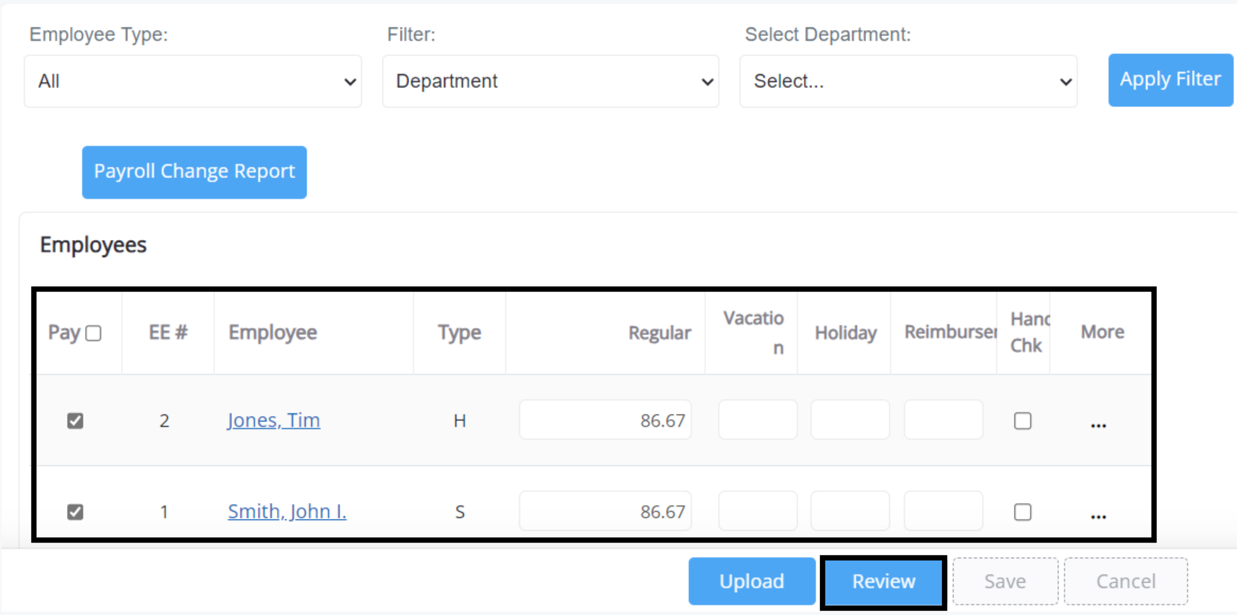
How do I Process a Payroll? (continued)

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.



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**

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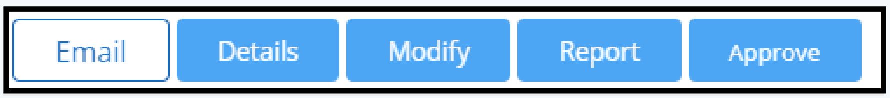
How do I Process a Payroll? (continued)

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.

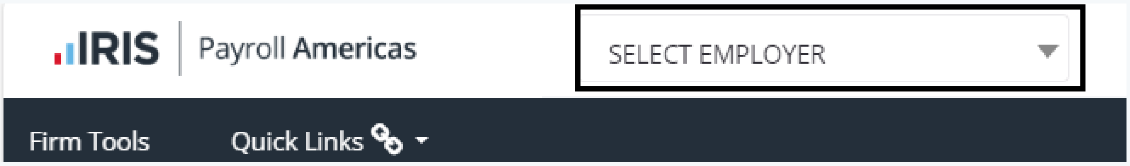
Click on the **Email** button to send PDF copies of the **Payroll Register Report** and **Change Report** to the Payroll Administrator and Secondary Payroll Administrator on file in the **Employer Setup**.

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

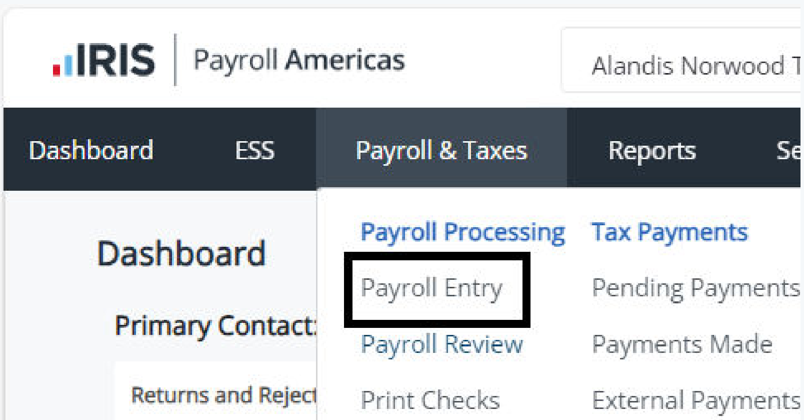


How do I Create an On-demand Payroll?

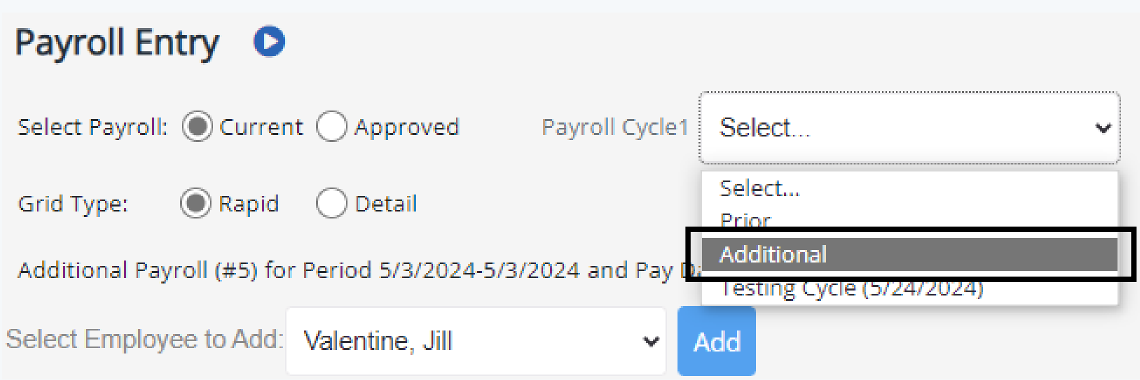
1. Select the **Employer** from the drop-down list at the top of the screen (only applicable if you have multiple clients using IRIS Payroll).



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



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



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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.

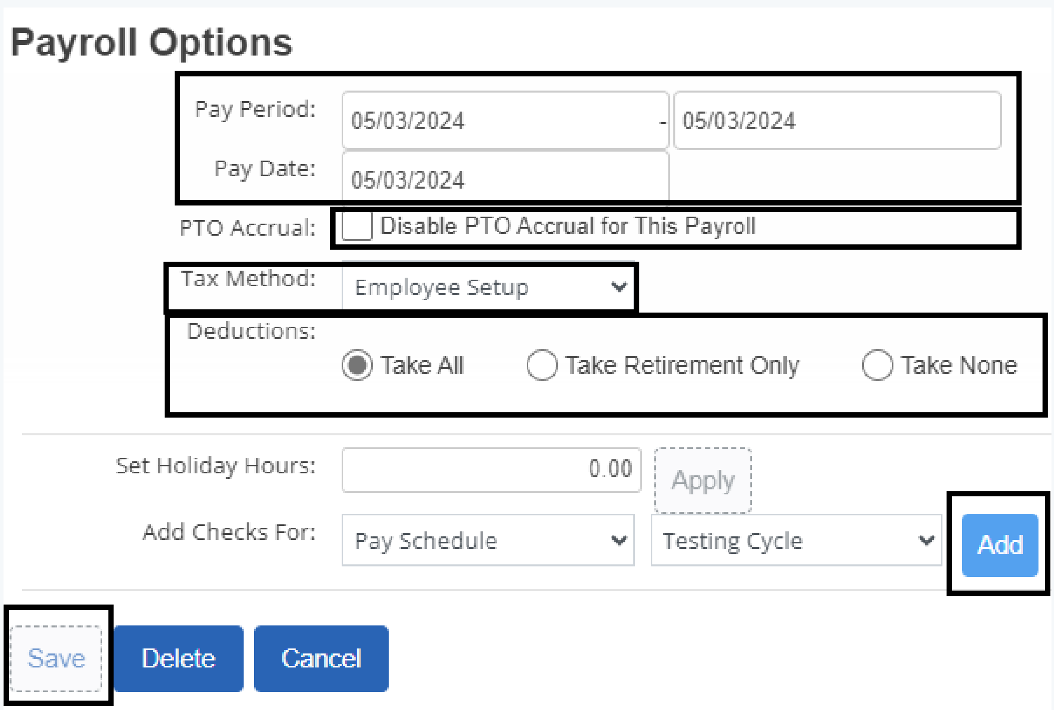
Specify whether or not to **Disable PTO Accrual for this Payroll**.

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.



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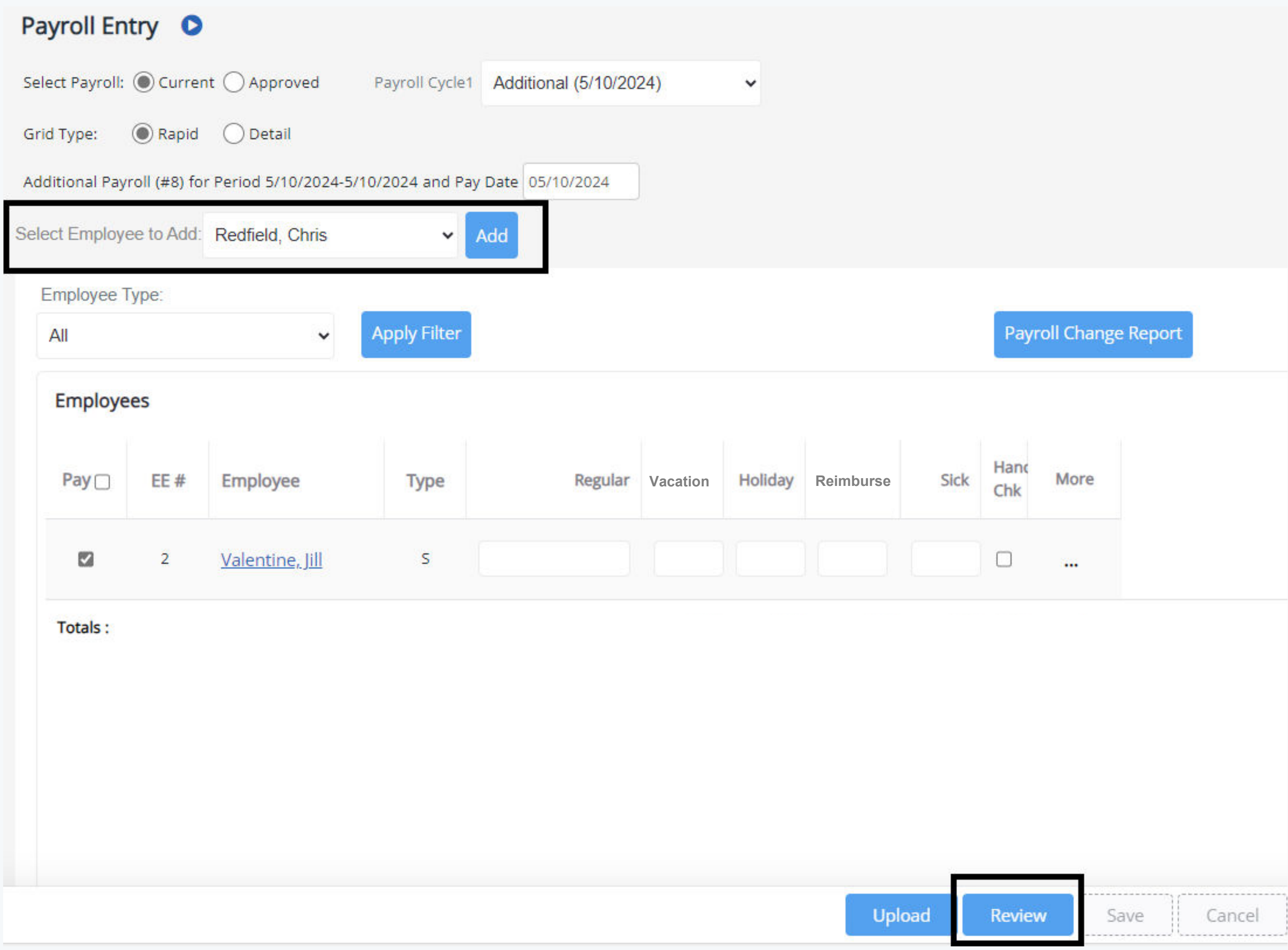
How do I Create an On-demand Payroll? (continued)

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.



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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.

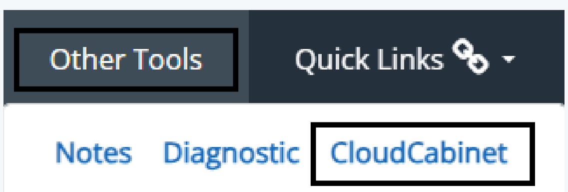
Click on the **Email** button to send PDF copies of the **Payroll Register Report** and **Change Report** to the Payroll Administrator and Secondary Payroll Administrator on file in the **Employer Setup**.

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

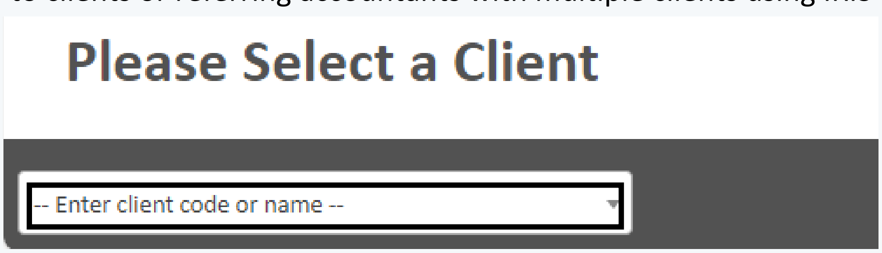
How do I View / Download Payroll Reports After a Payroll Processes?

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).



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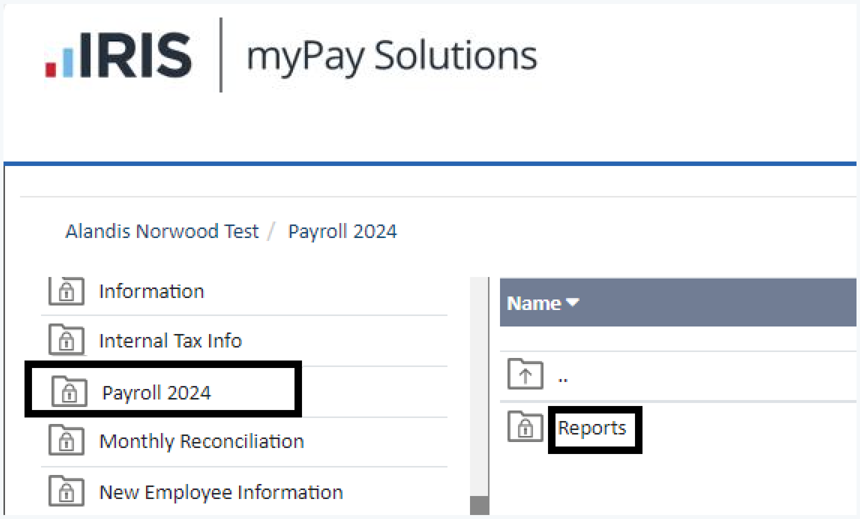
How do I View / Download Payroll Reports After a Payroll Processes? (continued)

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.