IRIS GP PAYROLL
VERSION 2009.1

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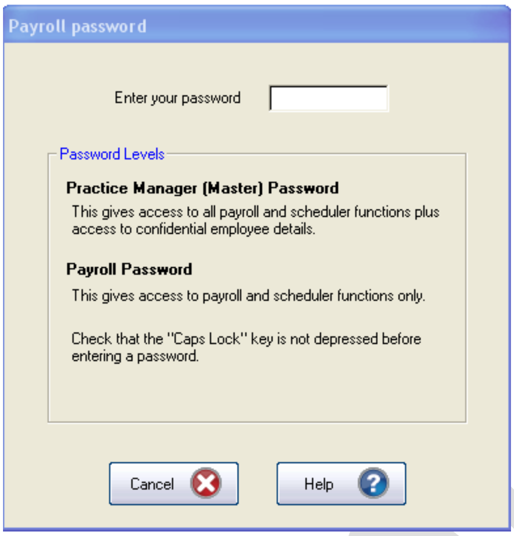
Logging On

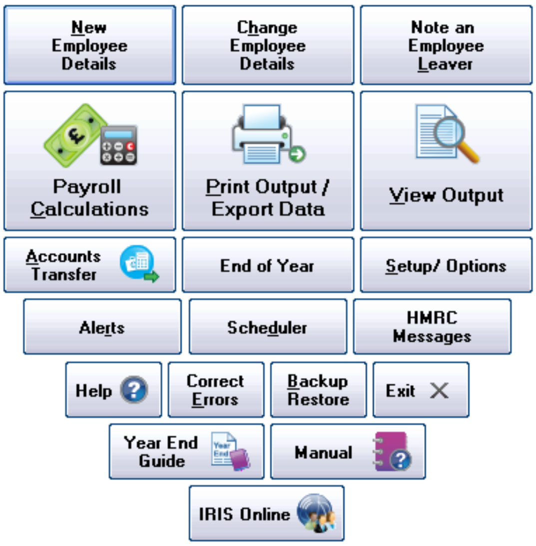
When you install the GP Payroll software you will be presented with an icon on your desktop that, when you double click on it, will open up the GP Payroll software.



You will be required to enter in the password, depending on the password you enter you will either has full access to the software or you will be able to access the payroll area and scheduler information, not the personal profile.

Hit enter to access the software.

You will be taken to the main screen where there are a number of buttons that you can click on the take you in to different areas of the software.

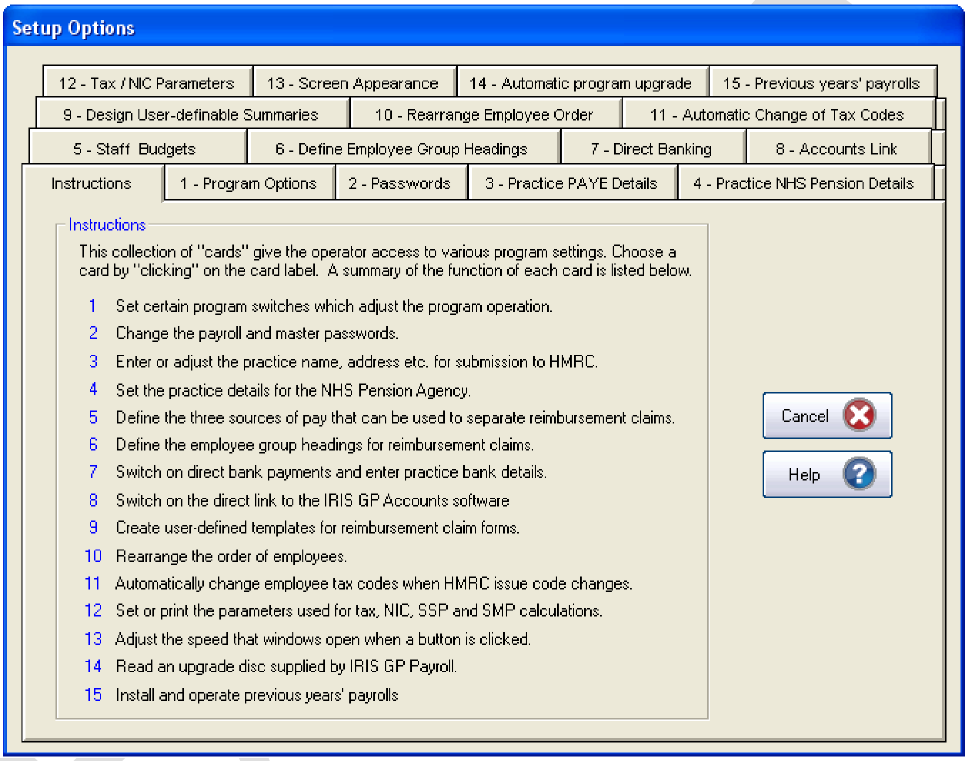


Program Set Up Options

There are various set up options that are avalible in GP Payroll, some that should be checked or adjusted before the package is ready to use and others that may only need to be accessed occasionally to set up or use a specific function.

To access the program set ups and option click on the Setup/Options button on the main screen.

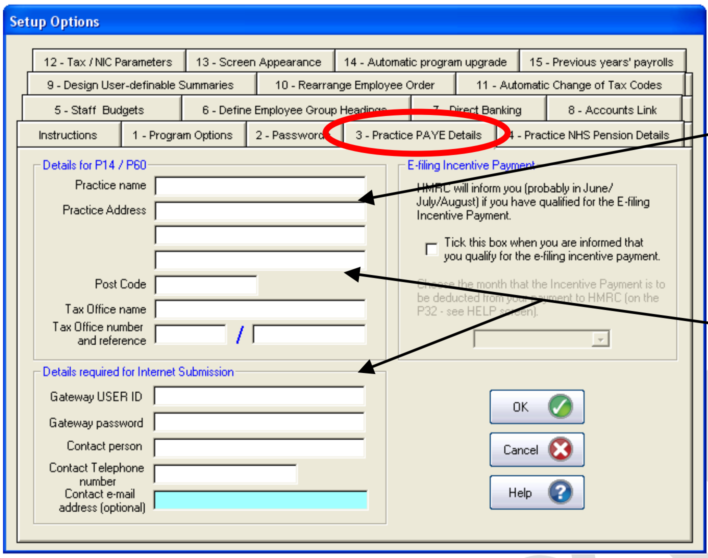
There are 15 tabs in the Setup/Options screen, as mentioned above you should check or adjust some of these options before we use the program and others you will use occasionally. There are also a few options that you will never change.



Entering PAYE Details

It is useful to complete the practices PAYE details when you initially start using GP Payroll as it allows you to use E-Filing. E-Filing is a way to submit information to the Inland Revenue electronically, information such as P45 for joiners and leavers and the End of Year filings, which is more efficient that submitting the detail on paper and will become compulsory in the near future.

From the main screen click on Setup/Options and go to tab 3:



Paper Filing:
If you will be submitting information manually by paper to the Inland Revenue, complete the Details for P14/P60 section on this screen

Electronic Filing
If you are submitting information using E-Filing then you are required to complete the Details for P14/P60 section and the Details Required for Internet Submission section on this screen (how to obtain the Gateway User ID is explained in the next chapter)

Note:

If you are entitled to the E-Filing Incentive payment check the tick box in the third section of this screen and choose the month you want the deduction to be taken from

Government Gateway

What is the Government Gateway?

You have the facility within Iris GP Payroll to communicate with the Inland Revenue and submit information, such as P45’s and End of Year returns, electronically through the Government Gateway.

When you send messages/submission to the Inland Revenue from your practice computer it doesn’t go directly to the Inland Revenue. It will go to the Government Gateway computer where it is passed to the relevant department; the Government Gateway is therefore like a sorting office.

When the department receives and accepts the message from the Gateway Computer, it will send a reply back to the Gateway Computer which will then be sent to the practice computer. If the practice computer is not connected to the internet it will be held until the connection is next made.

The Government Gateway computer not only sorts out the messages and electronic submissions, it also passes them on to the relevant departments and determines if the practice computer is registered to send the messages before they are passed on. It will only pass on the messages if it is entirely satisfied about the identity of the computer and operator.

Therefore you must register first to prepare the Gateway for you electronic submissions.

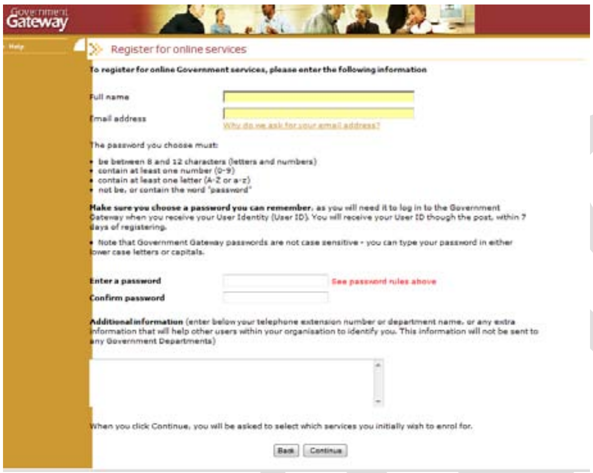
Registering with the Government Gateway

To inform the Gateway of your practice details you must register with them on online:

http://www.gateway.gov.uk

They will supply you with a USER ID which you will need to enter in the Details Required for Internet Submission section on the Practice PAYE Details tab.

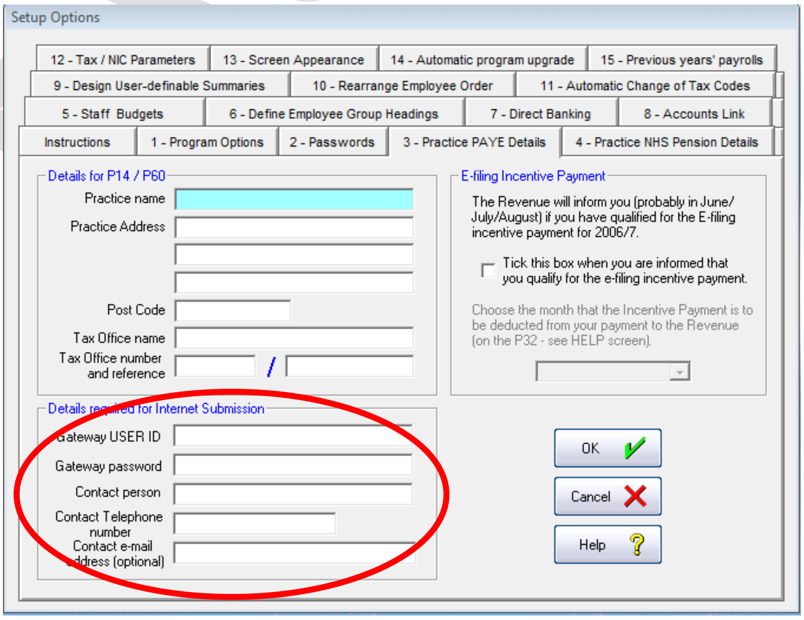
When you get to the above website click on Organisations and then click Register a User ID.



Enter in your details as requested and follow the steps until the registration is complete. You will receive a USER ID through the post within 7 days of registering.

Entering your Internet Submission Details

Once you get your USER ID through the post, log in to Iris, go to the Setup/Options area and select tab 3 – Practice PAYE Details. Enter in the Gateway User ID that has been provided, enter in your password which you created when you registered online and complete the contact details.



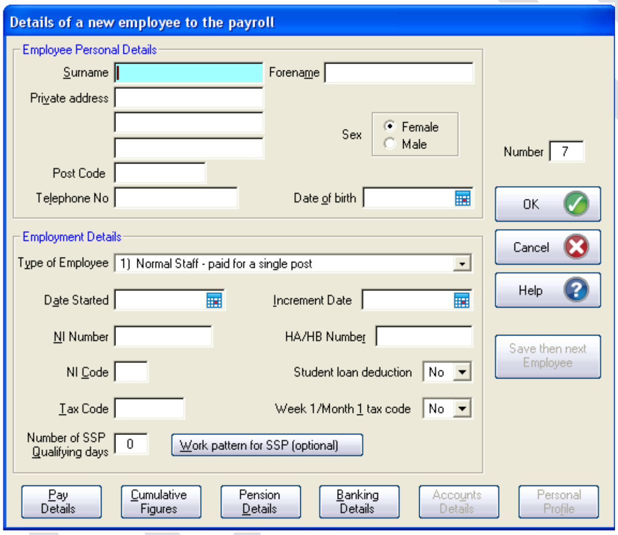
Entering Employees

There are three main steps to creating an employee: main employees details, salary details and cumulative or year to date figures (if they are new employees).

To beging entering a new employee click on the New Employee button on the main scree:

Entering Main Employee details:

Essential fields are name, NI code and Tax code. Other fields should be completed when info become avaliable. At the end of the year the file MUST have an NI number and DOB to be accepted by the Revenue



Employment details fields:

Type of employment	if they are normal staff, have more than one post etc...
Start Date	When employment started
Increment Date	The date of the employees next pay rise. This can be left blank but if it has a date in it, the employer will be noted on that month that a payrise is due and has not been entered.
NI Number	National Insurance Number
NI Code	Codes: A,B,C,D,E,F,G,J and L will be accepeted and have their normal meaning. It is NOT the last letter of their NI number and employees of GPs should be given a standard A code*
Student Loan Deduction	Only Y if/when get a Start Notice from Revenue or P45 will have Y in student loan. Deductions worked out automatically.

Tax Code	The tax code (if no P45, leave blank and can fill in when doing the Cumulitive Figures)
Week 1 / Month 1 tax code	Only Y if the Inland Revenue instructs you to use a Wk1 or Mth 1
Number of SSP Qualifying Days	This is the number of days (including part days) when the employee is avaliable to work. It is important that this is correct or the SSP calcualtion may be worng. If you intend to use the diary to note absences the system must know the number of days employees are expected to work. You can also specify the work pattern for SSP which is optional by clicking on the button.

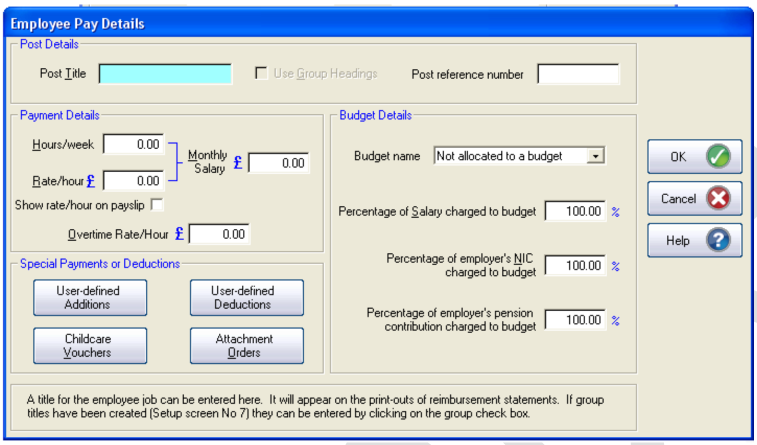
*unless they have a valid “certificate of election” then they should have B. Over pension age and they have a valid “certificate of age examption” then they should have C. Have joined the NHS pension scheme then they should have D, unless they have a “certifiacate of election” then they have E. If they are of pension age and have joined the NHS pension scheme then they have C.

Entering Salary Details

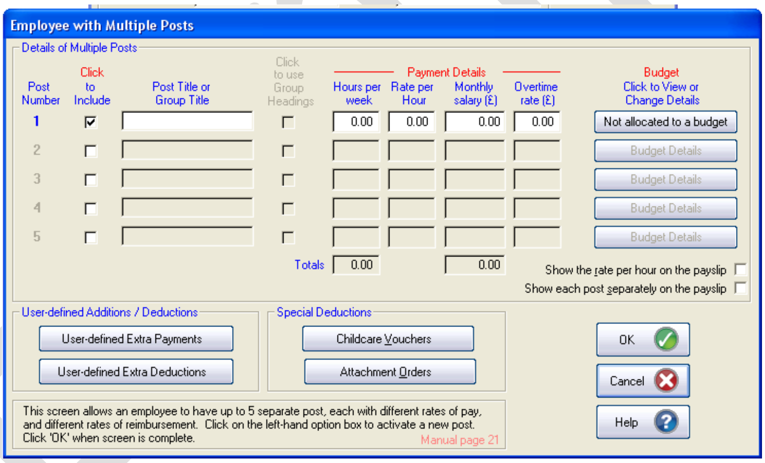
Click on the pay details button to enter details :

Depending on what type of employee you have selected, the box will be different

Staff with one post:



Staff with multiple posts:



Post Details

Post title: Job title but not neccessary when have one post

Post Ref Number: Employees ref number

Payment Details:

Three fields are interrelated, once you enter two the thrid will complete. The salary is calculated: monthly salary =(weekly hours X hourly rate). Some practices may use different, if so true montly salary should be entered.

Tick box to show on payslip and overtime rate entered if applicable.

Budget Details

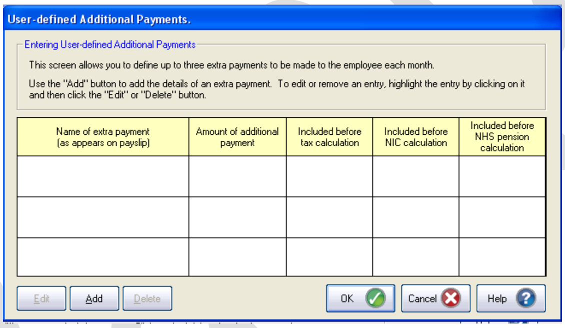
Allows payments to be charged to one of ten budgets that you may have set up.

When you have entered in all of the information you can click OK and the pay details button will have a small yellow tick next to it indicating that these details have been saved:

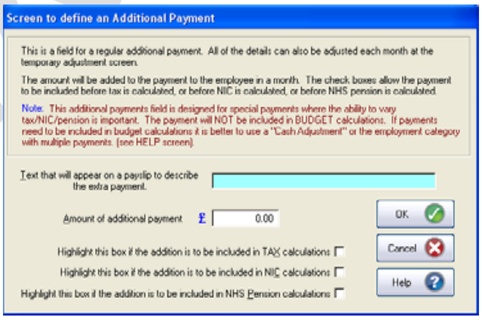
Special Payments or Deductions

This area allows you to include up to three user defined additions and/or user defined deductions per employee. Any information added in this area will appear in the temportary adjustment screen ever single month, however if you need to amend the details for a single payment you can do in the trmporary adjustment screen.

Click on either the addtions or deductions button in the employees pay set up screen:



Click on the add button to add a new addition/deduction:

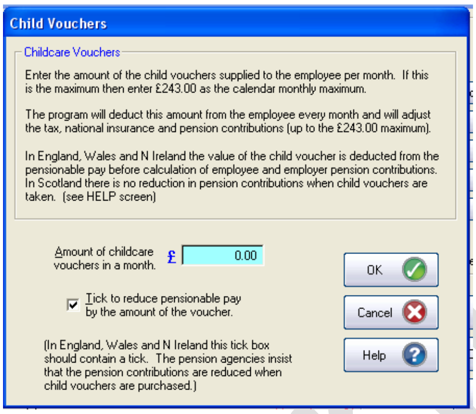


Enter in the name of the addition/deduction and the amount and specify if it is subject to TAX, NI and Pension deductions by ticking the boxes accordingly.

When you have entered in all of the relevant information click the OK button.

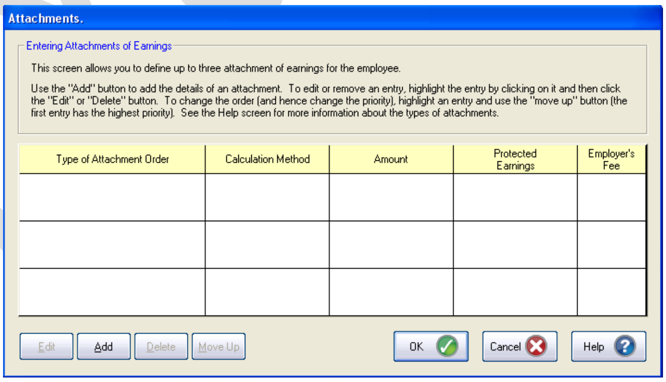
Childcare Vouchers

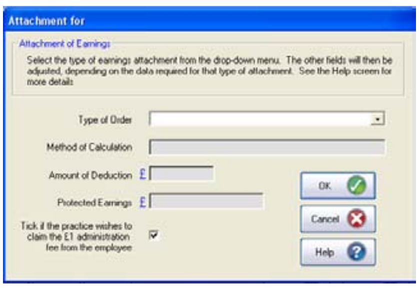
Childcare vouchers can be supplied under certain conditions. The value of the monthly amount should be entered. The amount will be deducted from the employee; however they will save on TAX, NIC to a maximum of £243. It will be deducted and will show on the payslip.



Attachement Orders

Allows you to enter up to three attachements to earnings. Click to Add button to enter details such as child support, community charge etc... The details of the charge will be provided to the practice from the courts. There is a £1 optional charge that the practice can withhold for admin costs.



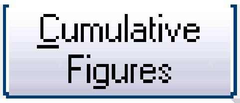


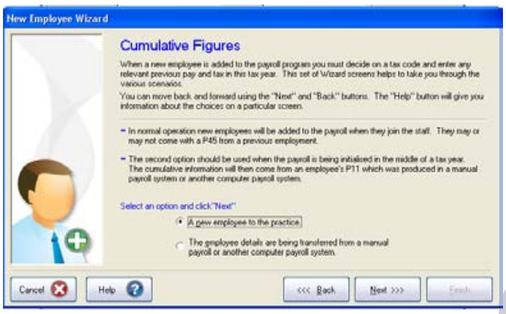
Entering Cumulative Figures

With P45

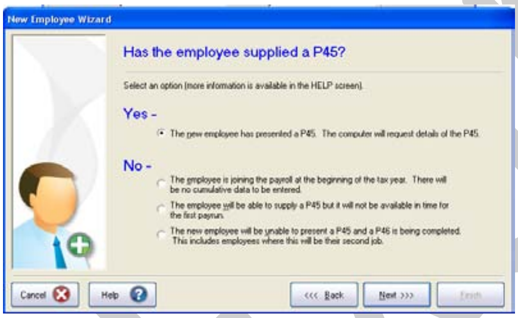
A wizard has been added to simply the process of entering the cumultive figures. On each screen you will be required to make certain entries which will define the other screens that are presented. You can use the Next and Back button to navigate throught the Wizard.

Click on the Cumultive Figures button to start the Wizard.



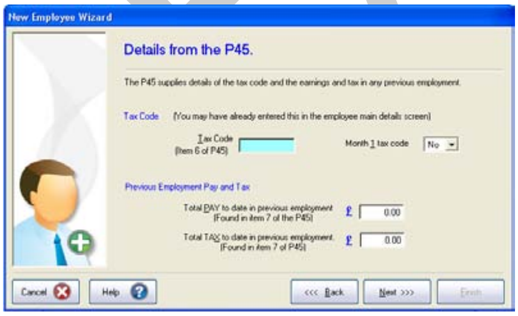


Select one of the two options "A new employee to the practice" or "The employee details are being transfered from a manual payroll or another computer payroll system.



If you selected in step one that they are a new employee, in step two you will have to confirm whether or not you have received their P45.

Select either Yes or one of the three options from No.



If you selected Yes in step 2 you will have to provide the details from the P45 including the Tax code, if the employee is on Month/Week 1 Tax Code and the previous employment Pay and Tax details.

The program has the facility to transmit part 3 of the P45 to the Inland Revenue.

Pages 20 – 75 removed

(Example only)