IRIS Payroll Professional

Guide to creating Aviva output file

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www.iris.co.uk/customer

Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Aviva output file. You can create output files for Aviva to enrol workers and inform them of the contributions taken.
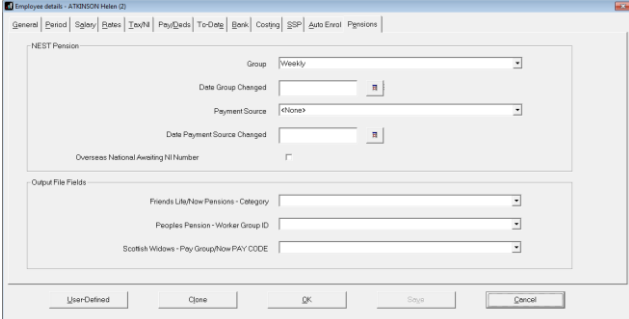
The guide covers:

- Configuring output file information
- Creating an output file each month

Aviva configuration

Aviva require a **Category** for each employee to identify which category number the employee is being enrolled in. These numbers are assigned by Aviva once you have created a pension scheme with them and start with either "TK" or "SP". The category number prefix indicates which type of pension scheme you have, for more information click [here](#).

Employee Details configuration

1. Go to the **Employee** menu and choose **'Select Employee'**

2. Choose the employee and click **'OK'**

3. Select the **'Pensions'** tab

4. In the **Friends Life/Now Pensions - Category** field, choose the appropriate Group for each employee that is a member of the Aviva scheme
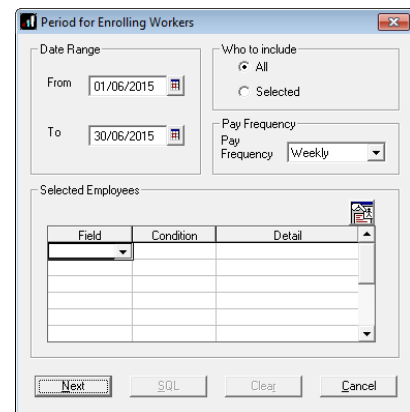

If the **Friends Life/Now Pensions - Category** doesn't contain any options, you can create a new one by typing directly in the field and then click **'Save'**. The new **Friends Life/Now Pensions - Category** option will be available to select in the dropdown field.
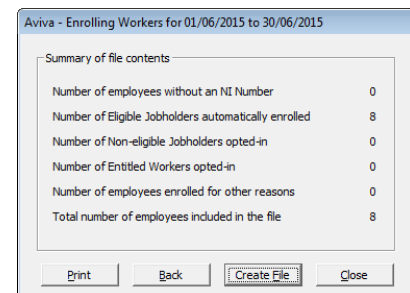
Aviva – Joiners file

You should send a Joiners file to Aviva if you have any employees automatically enrolled or opted in the pay period.
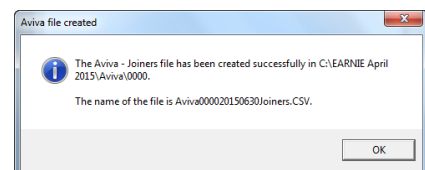
Create Aviva Joiners file:

1. Go to the **Pension** menu and select '**Create Pension File**'

2. On the **Select File to Create** screen, choose **'Aviva - Joiners'**

3. Click **'OK'**

4. On the **Period for Enrolling Workers** screen, enter the **'From'** and **'To'** dates for the date range to create the file.

5. In the **Who to include** section, accept the default of **'All'**

6. In the **'Pay Frequency'** field, to choose the payment frequency of employees you want to include in the output file

7. Click **'Next'**

8. On the **Aviva – Enrolling Workers for...**screen, click **'Print'** to print a report of the employees that are included in the file.

9. Click **'Create File'** to create the **Aviva Joiners** file

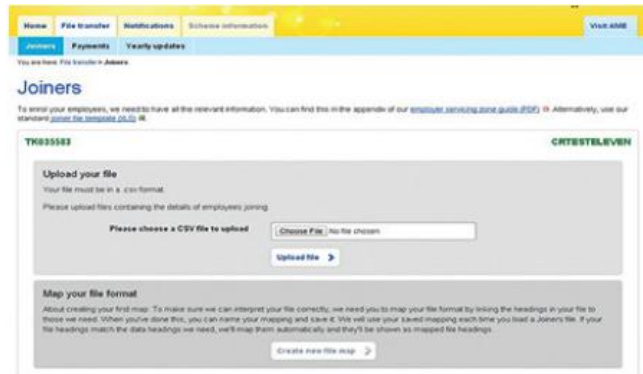10. A message will advise the location where the **Aviva - Joiners** file has been created

Upload a Joiners file:

1. Login to your Aviva account on the **Employer servicing zone home page**

2. If you have more than one pension scheme with Aviva, select the scheme you want to upload the output file for

3. In the **File transfer** section, select **'Joiners'**

4. In the **Upload your file** section, in the **Please choose a CSV file to upload**, click **'Choose file'** and go to the location where your payroll created the **Aviva** output file.
The output file from the payroll is in the format required by Aviva, so you shouldn't need to map your file.

5. Click **'Upload file'** button

Click here for more information about uploading a file to Aviva.

When uploading the file to Aviva, errors may occur if you have inaccurate employee data.

Aviva – Payments file

You should send a Payments file to Aviva each period you have paid your employees.

Create Aviva Payments file:

1. Go to the **Pension** menu and select '**Create Pension File**'

2. On the **Select File to Create** screen, choose **'Aviva - Payments'**

3. Click **'OK'**

4. On the **Period for Contribution Schedule** screen, enter the **'From'** and **'To'** dates for the date range to create the file. Aviva expect the payments file on a monthly basis.

5. In the **Who to include** section, accept the default of **'All'**

6. In the **Pay Frequency** field, choose the payment frequency of employees you want to include in the output file

7. Click **'Next'**

Your payroll has the ability to hold back contributions as per the Pensions Regulator's advice. However, Aviva said they prefer this option isn't used.

8. Tick the box in the '**Exclude**' column to exclude an employee from the file. This will hold back the employee's contributions until the date entered in the **Exclude until** column.
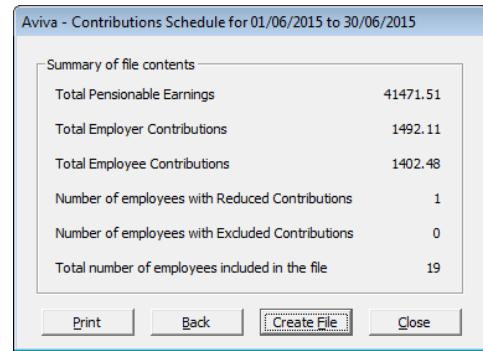
9. Click **'Next'**

10. You must inform Aviva of any employees that didn't have a pension contribution taken or made a reduced contribution.
You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.
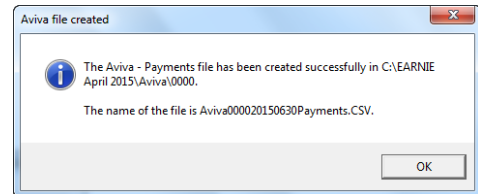
11. Click **'Next'**

12. On the **Aviva – Contribution Schedule for...**screen, click **'Print'** to print a report of the employees that are included in the file.

13. Click **'Create File'** to create the **Aviva – Contribution Schedule** file

14. A message will advise the location where the **Aviva Payments** file has been created

Upload a Payments file:

1. Login to your Aviva account on the **Employer servicing zone home page**

2. If you have more than one pension scheme with Aviva, select the scheme you want to upload the output file for

3. In the **File transfer** section, select **'Payments'** and follow the on screen instructions

4. The first time you upload a Payments file to Aviva, you will need to map the column headings in the file to Aviva data headings.
This file mapping will be remembered for all subsequent Payments file uploads.

Click here for more information about uploading a file to Aviva.

Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary calculations, produce files in the right format for your pension provider* and generate the necessary employee communications.

IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

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
Tel: 0844 815 5700 Email: sales@iris.co.uk	Tel: 0844 815 5677 Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk