

IRIS Payroll Professional

Guide to creating Standard Life output files

25/08/2015



IRIS

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Introduction

This guide will give you an overview of how to configure your payroll to include information required in Standard Life's output files. You can create output files for Standard Life to enrol workers and inform them of the contributions taken.

The guide covers:

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

Multiple Pay Frequency Configuration

You only need to complete the **Multiple Pay Frequency Configuration** if your company has more than one pay frequency, for example weekly paid employees and monthly paid employees. For companies that have multiple pay frequencies, Standard Life require a **Site Code** in the output file for each employee.

If you only have one pay frequency, for example all employees are paid monthly, you don't need to complete this configuration.

Site Code configuration

- Go to the Pension menu, select 'Configure Auto Enrolment', and select the 'NEST' tab
- 2. In the **Employer Reference Number** field, enter a dummy number such as **'EMP000000000'**
- In the Group section, create your site codes by typing directly into the Description field, for example 'Weekly' and 'Monthly'
- Configure Auto Enrolment

 Pensions
 NEST

 Contact Details

 Employer Reference Number

 Employer Reference Number

 Description

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4. Click **'OK'**

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
- In the Group field, choose the appropriate Group for each employee that is a member of the Standard Life scheme

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Group	Investiy	-
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Payment Source	(None)	-
Date Payment Source Changed	Π	
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Output File Fields		
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Peoples Pension - Worker Group ID	[•
Scotlish Widows - Pay Group/Now PAY CODE		•



Standard Life G2G – Joiners file

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

Create Standard Life G2G Joiners file:

- 1. Go to the Pension menu and select 'Create Pension File'
- 2. On the Select File to Create screen, choose 'Standard Life G2G Joiners'
- 3. Click **'OK'**
- 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'
- In the 'Pay Frequency' field, to choose the payment frequency of employees you want to include in the output file
- 7. Click 'Next'
- On the Standard Life G2G Enrolling Workers for...screen, click 'Print' to print a report of the employees that are included in the file.
- Click 'Create File' to create the Standard Life G2G Joiners file
- A message will advise the location where the Standard
 Life G2G Joiners file has been created

Period for Enrolling Work	ers 🔀
Date Range From 25/05/2014	Who to include
To 31/05/2014 🕅	Pay Frequency Frequency Weekly
- Selected Employees	
Field Condi	tion Detail 🔺
<u>N</u> ext <u>SQL</u>	Clear <u>C</u> ancel
Standard Life G2G - Enrolling	9 Workers for 25/05/2014 to 31/05/2014

Summary of file contents	
Number of employees without an NI Number	0
Number of Eligible Jobholders automatically enrolled	9
Number of Non-eligible Jobholders opted-in	0
Number of Entitled Workers opted-in	0
Number of employees enrolled for other reasons	0
Total number of employees included in the file	9
Print Back Create File	<u>C</u> lose

Standard Li	fe G2G file created
0	The Standard Life G2G Joiners file has been created successfully in C\Program Files (x86)\EARNIE\Standard Life G2G\0000. The name of the file is StandardLifeG2GEW00002014052520140531.CSV.
	ОК

Upload Standard Life G2G Joiners file:

- 1. Login to your GPZ
- 2. On the Home page, select the 'Assessment, communications and joining'

Standard Life

- On the Assessment, communications and joining page, select the option 'Assessment, communications and joining'
- 4. On the **Options** page, select 'Join'

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- In the Step 3 section, select 'Send the file you have created'. There is no need to complete the other steps because your payroll has created the file for you
- Read the **Declaration** on screen. When you're happy to continue, click the **'Accept'** button
- 7. On the Select file screen, click 'Browse' and go to the location where your payroll created the Standard Life G2G Joiners output file. When you have selected the file, click 'Send file'

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Click here for more help from Standard Life.

Standard Life G2G – Payments file

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

Create Standard Life G2G Payments file:

- 1. Go to the Pension menu and select 'Create Pension File'
- 2. On the Select File to Create screen, choose 'Standard Life G2G Payments'
- 3. Click **'OK'**
- On the Period for Contribution Schedule screen, enter the 'From' and 'To' dates for the date range to create the file.
- In the Who to include section, accept the default of 'All'
- 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, Standard Life said they prefer this option isn't used.

- 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'

Code	Surname	Forename	NI Number	Enrolment	Exclude	Exclude until
1	DUNSTON	Arnold	NM3422198	25/05/2014	11	
2	ATKINSON	Helen	NB662391D	25/05/2014		
5	PETERSON	Ralph	JA509634C	25/05/2014	11	
9	BROADBENT	Terry	NA729474A	25/05/2014	10	
10	JACKSON	Florence	NM7755448	25/05/2014		
12	KILDARE	Kevin	RT937124C	25/05/2014	11	
14	EMMANUELLE	Gladys	NM765340A	25/05/2014	10	
17	NIGHTINGALE	Pam	JB564889A	25/05/2014		
18	FOSTER	Jim	NM7768408	25/05/2014	10	

Period for Contribution Schedule

From 25/05/2014 II

31/05/2014 🔳

Payment Source & NEST Details

NEST Payment Frequency

Conditi

Payment Source

Date Payment Due

Next

Who to include

C Selected

Pay Frequency Weekly

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<Select NEST Payment Freque

Detail

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Cancel

Pay Frequency

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Date Range

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 You must inform Standard Life 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'



- On the Standard Life G2G 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 Standard LifeG2G Contribution Schedule file
- A message will advise the location where the Standard Life G2G Payments file has been created

Upload Standard Life G2G Payments file:

- 1. Login to your GPZ
- 2. On the Home page, select the 'Make Payments'
- In the Step 3 section, select 'Send Schedule'. There is no need to complete the other steps because your payroll has created the file for you
- On the Confirm Payment Details screen, enter the pay period's Payroll Date for the file you're sending to Standard Life.
- Check the displayed bank details are correct.
 If you are happy with the details, click 'Bank
 Details are Correct'

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Confirm Paym	ent Details		
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Account exmons Account same: Sent code	12365678 slogicity fear 11-22-35	Samit Address: Hito Danis pri: 11 Habann London C(14) 2018	

6. Browse to the location where your payroll created the **Standard Life G2G Payments** output file. When you have selected the file, click **'Send Schedule'**

Standard Life G2G - Contributions Schedule for 25/05	j/2014 to 31/05/.
Summary of file contents	
Total Pensionable Earnings	23721.14
Total Employer Contributions	266.84
Total Employee Contributions	564.96
Number of employees with Reduced Contributions	9
Number of employees with Excluded Contributions	0
Total number of employees included in the file	17
Print Back Create File	<u>C</u> lose

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 On the Confirm Column Headers screen, check the column headers match the file you want to upload and the click 'Continue'

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Click <u>here</u> for more help from Standard Life.



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	Tel:	0300 200 3200			
Fax:	0844 366 7828	Tel:	0300 200 3211 (new business)			
Email:	helpdesk@ir-efile.gov.uk					

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls			
Tel: 0844 815 5700	Tel: 0844 815 5677			
Email: sales@iris.co.uk	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



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