IRIS Payroll Professional

Guide to creating Standard Life output files

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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

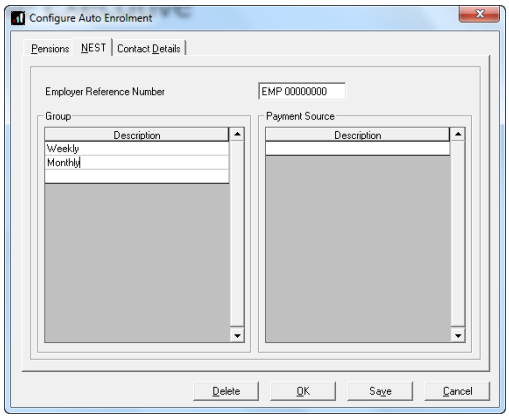
Multiple Pay Frequency Configuration

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.

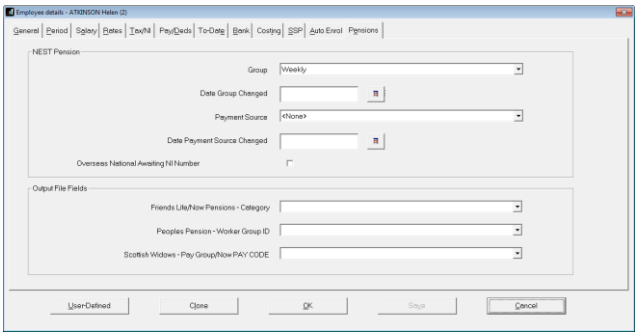
Site Code configuration

1. 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'**
3. In the **Group** section, create your site codes by typing directly into the **Description** field, for example 'Weekly' and 'Monthly'
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
4. In the **Group** field, choose the appropriate Group for each employee that is a member of the Standard Life scheme

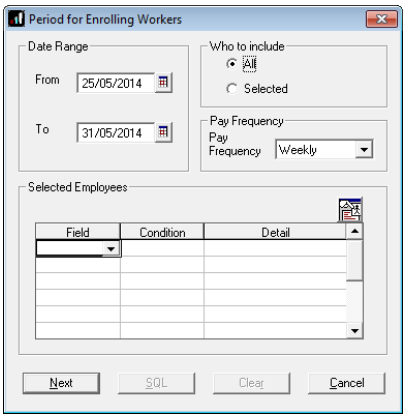


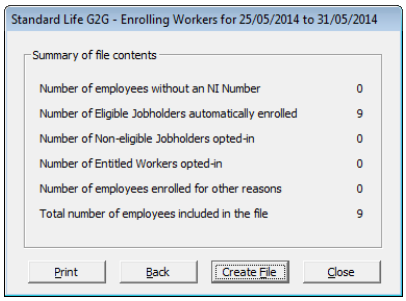
Standard Life G2G – Joiners file

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

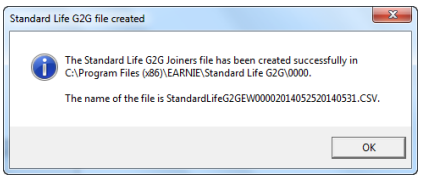
Create Standard Life G2G Joiners file:

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'**
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 **Standard Life G2G – 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 **Standard Life G2G Joiners** file



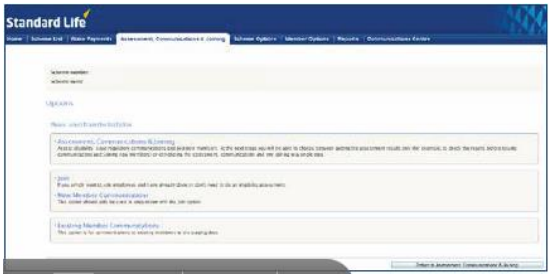


10. A message will advise the location where the **Standard Life G2G Joiners** file has been created

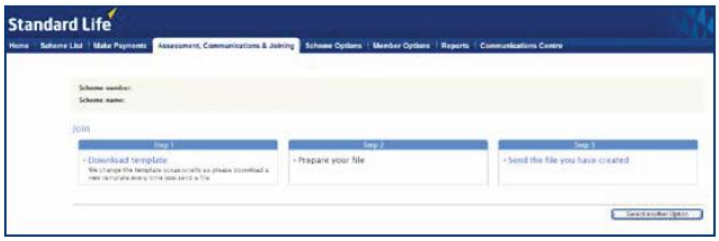


Upload Standard Life G2G Joiners file:

1. Login to your GPZ
2. On the **Home** page, select the **'Assessment, communications and joining'**
3. On the **Assessment, communications and joining** page, select the option **'Assessment, communications and joining'**
4. On the **Options** page, select **'Join'**

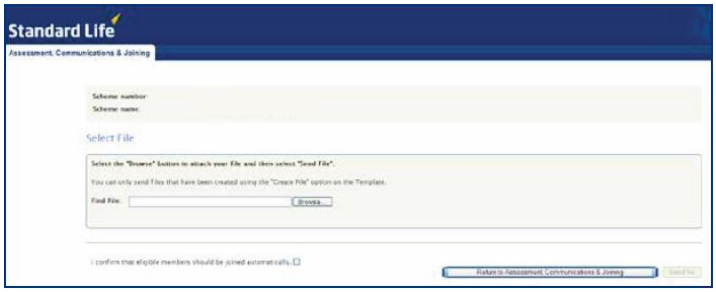


5. In the **Step 3** section, select **'Send the file you have created'**. There is no need to complete the other steps because your payroll has created the file for you



6. 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'**



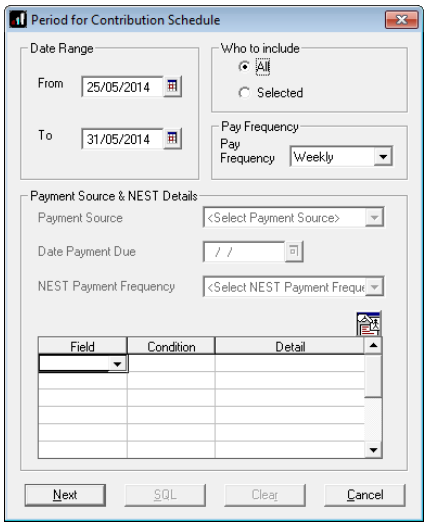
Click here for more help from Standard Life.

Standard Life G2G – Payments file

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

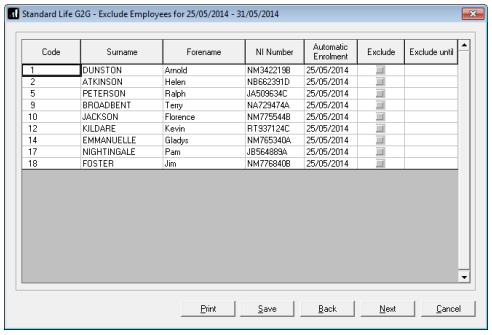
Create Standard Life G2G Payments file:

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'**
4. On the **Period for Contribution Schedule** 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, choose the payment frequency of employees you want to include in the output file
7. Click **'Next'**

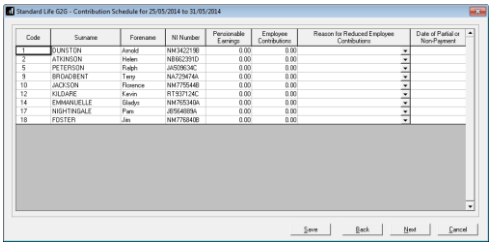


Your payroll has the ability to hold back contributions as per the Pensions Regulator's advice. However, Standard Life said they prefer this option isn't used.

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'**

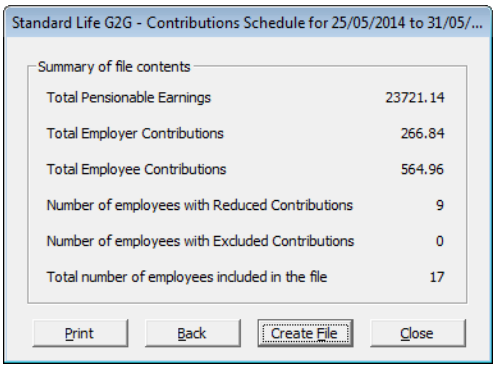


10. You must inform Standard Life of any employees that didn't have a pension contribution taken or made a reduced contribution.
    You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.
11. Click **'Next'**

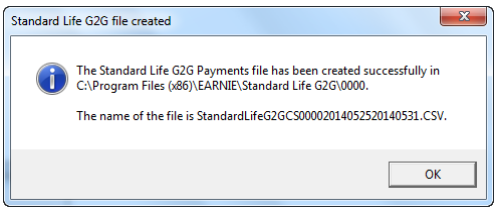


12. On the **Standard Life G2G – Contribution Schedule for…**screen, click **'Print'** to print a report of the employees that are included in the file.

13. Click **'Create File'** to create the **Standard Life G2G – Contribution Schedule** file

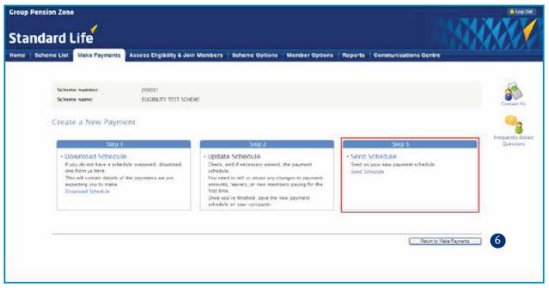


14. A message will advise the location where the **Standard Life G2G Payments** file has been created

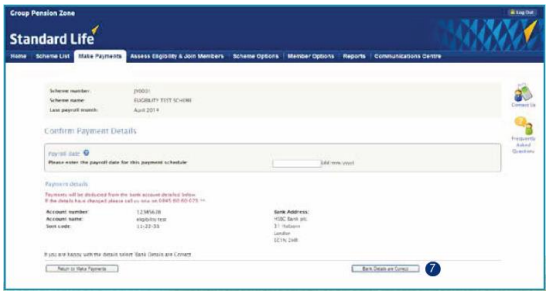


Upload Standard Life G2G Payments file:

1. Login to your GPZ
2. On the **Home** page, select the **'Make Payments'**
3. 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

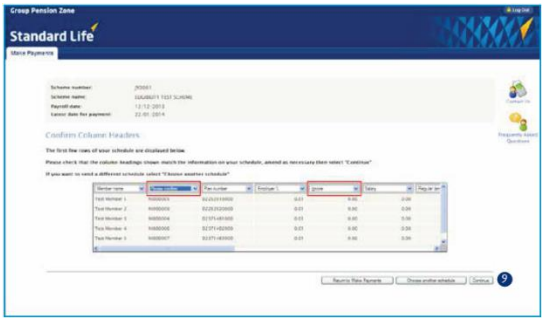


4. On the **Confirm Payment Details** screen, enter the pay period's **Payroll Date** for the file you're sending to Standard Life.
5. Check the displayed bank details are correct. If you are happy with the details, click **'Bank Details are Correct'**



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'**

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



Click here 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 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

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