

IRIS Payroll

Guide to creating Aviva output file

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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 an output files for Aviva to enrol workers and inform them of the contributions taken.

The guide covers:

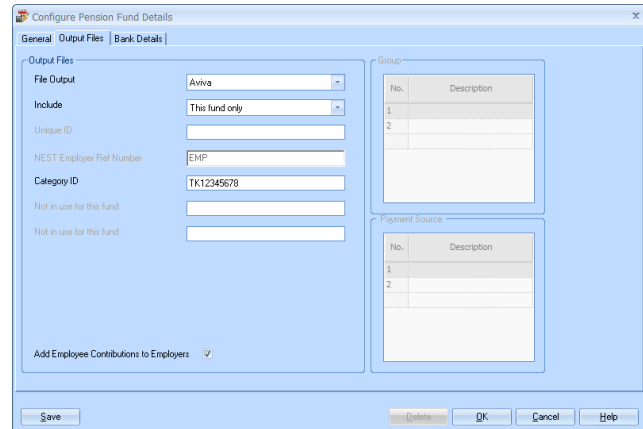
- Configuring output file information
- Creating an output file each period

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](#).

Pension Fund configuration

1. Go to the **Pension** tab and click **'Configure Pension Fund'**
2. Select the Aviva pension fund and click **'Edit'**
3. Select **'Output Files'** tab
4. In the **File Output** field, select **'Aviva'**
5. In the **Include Employees** field, select **'This fund only'** (unless you have been told a different option by Aviva)
6. In the **Category ID** field, enter your Category as supplied by Aviva
7. If you have Salary Sacrifice pension deductions, tick **'Add Employee Contributions to Employers'**



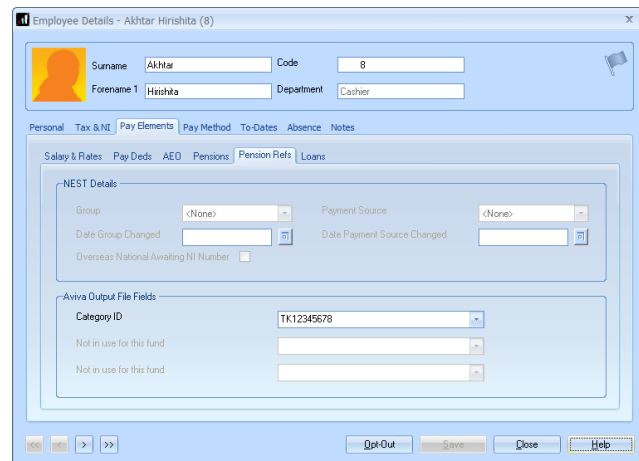
The screenshot shows the 'Configure Pension Fund Details' dialog box with the 'Output Files' tab selected. The 'File Output' dropdown is set to 'Aviva', 'Include' is 'This fund only', and 'Category ID' is 'TK12345678'. The 'Add Employee Contributions to Employers' checkbox is checked. There are two empty tables for 'Group' and 'Payment Source'.

If your pension deductions are not Salary Sacrifice, the **Add Employee Contributions to Employers** box is disabled

8. Click **'OK'**

Employee Details configuration

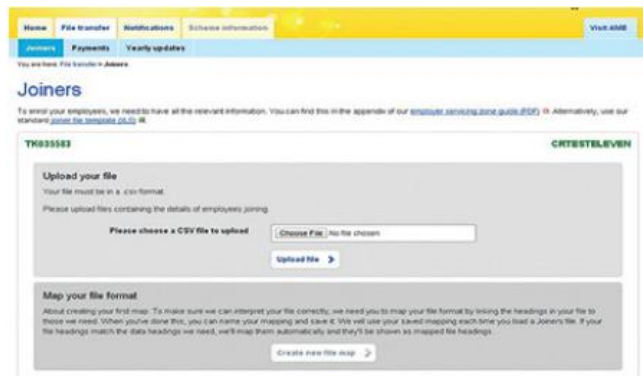
1. On the left-hand Selection Bar, double-click on the appropriate employee to open their **Employee Details**
2. Select the **'Pay Elements'** tab and the select **'Pension Refs'**
3. If the employee has a different **Category ID** than the one configured in the **Pension Fund**, select the employee's appropriate **Category ID**.



You can create a new **Category ID** by typing directly in the field and then click **'Save'**. This will now be available to select in the dropdown field.

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

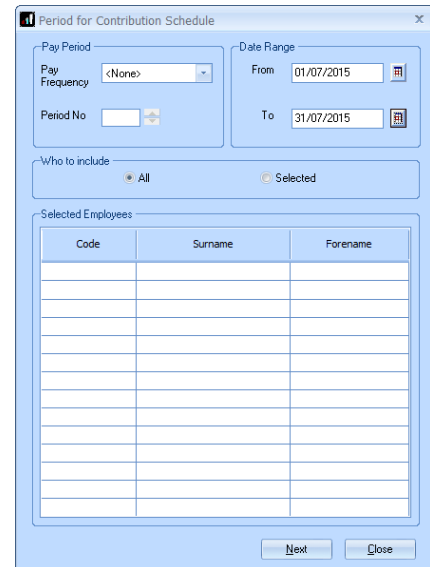


Click [here](#) for more information about uploading a file to Aviva.

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

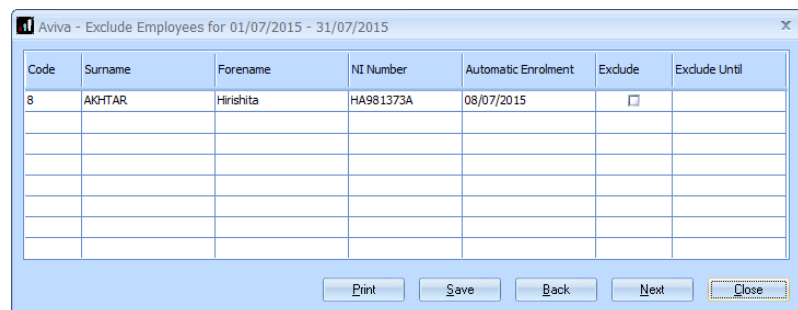
Create a Payments file:

1. Go to the **Pension** menu and select '**Create Pension File**'
2. On the **Select file to create** screen, choose **Aviva Payments**
3. Click '**Next**'
4. To choose the employees to include in the Payments file, on the **Period for Contribution Schedule** screen:
 - Monthly only - choose the '**Pay Frequency**' and '**Pay Period**' you processed the payroll for
 - Combined/other pay frequencies – enter the **Date Range** for one month. This is the month the processed payrolls fall within
5. In the **Who to include** section, accept the default of '**All**'
6. Click '**Next**'

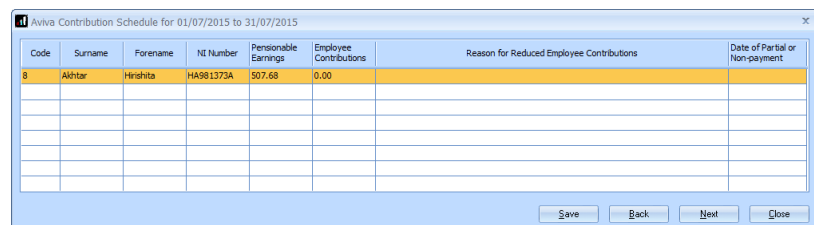


Your payroll has the ability to hold back contributions until the end of the opt-out window. Any employees' contributions withheld will not be included in the output file to Aviva.

7. 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.



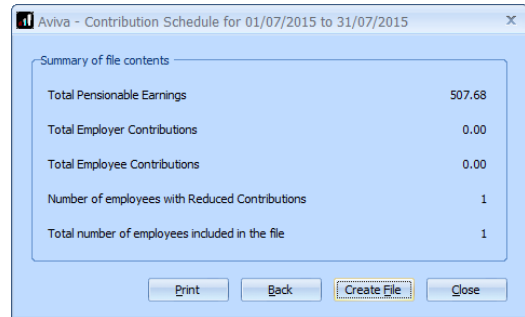
8. Click '**Next**'
9. You must inform Aviva of any employees that didn't have a pension contribution taken or made a reduced contribution.



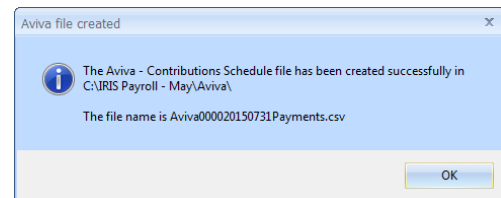
You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.

10. Click '**Next**'

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



13. 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	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