

IRIS Payroll

Guide to creating Standard Life output files

27/08/2015



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Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Standard Life output file. You can create an 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

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Standard Life configuration

If your company has more than one pay frequency, for example weekly paid employees and monthly paid employees, Standard Life require a **Site Code** in the output file for each employee.

Pension Fund configuration

- Go to the Pension tab and click 'Configure Pension Fund'
- Select the Scottish Widows pension fund and click 'Edit'
- 3. Select 'Output Files' tab
- In the File Output field, select
 'Standard Life G2G'
- 5. In the Include Employees field, select 'This fund only' (unless you have been told a different option by Standard Life)

file Output	Standard Life 626				
			No.	Description	
nclude	This fund only	1			
		2			
VEST Employer Ref Number	EMP				
	Office				
		L			
		Pa		IICE	
			No.	Description	
		2			
dd Employee Contributions to En	monare 🔽				

- 6. If you have multiple pay frequencies, enter 'Site Code' in the field
- If you have Salary Sacrifice pension deductions, tick 'Add Employee Contributions to Employers'

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

8. Click **'OK'**

Employee Details configuration

If you have multiple pay frequencies, then you will need to select the appropriate **Site Code** for the employee in **Employee Details**.

- On the left-hand Selection Bar, double-click on the appropriate employee to open their Employee Details
- Select the 'Pay Elements' tab and then select 'Pension Refs'
- In the Site Code dropdown field, select the appropriate details for the employee
- 4. Click 'Save' and then click 'Close'

🖞 Employee Details - Akhtar Hirishita (8) - Rollback in Progress 🛛 🗴
Surrame Akhlar Code 8 Forename1 Hisisika Department Coshier
Personal Tax & NI Pay Elements Pay Method To-Dates Absence Notes
Salary & Rates Pay Deds AED Pensions Pension Refs Loans
Standard Life Details
Site Code Weekly Payment Source (None)
Date Site Code Changed
Overseas National Awaiting NI Number 📃
Output File Fields
Not in use for this fund
Not in use for this fund
Not in use for this fund
Image: Second



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:

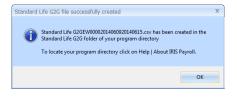
- 1. Go to the Pension menu and select 'Create Pension File'
- 2. On the Select file to create screen, choose Standard Life G2G Joiners
- 3. Click 'Next'
- 4. On the Period for Enrolling Workers screen, choose the 'Pay Frequency' and 'Pay Period' you processed the payroll for and want to create the Standard Life file
- 5. In the Who to include section, accept the default of 'All'
- 6. Click 'Next'

Period for Enroll		Date Rang	e
Pay Frequency	kly 🔹	From	•
Period No 10	•	То	
-Who to include	• All	© Sel	ected
Code	Surnan	ne	Forename

- 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

Standard Life G2G - Enrolling Workers for 09/06/2014 to 15/06/2014		x
Summary of file contents		
Number of employees without an NI Number	0	
Number of Eligible Jobholders automatically enrolled	6	
Number of Eligible or 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	6	
Print Back Create Ele Qo	se	

 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'

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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	And Appendix Antonio and Appendix Appen		And Angenetic Research Conversion of Linking Conversion of Li	An expension from the second of the second o

- 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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Assessment C	ammunications & Joining
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	Select File
	Select the "Bourse" bottom in attack your file and then select "lead file".
	You can only send files that have been created using the "Create Hild" option on the Template.
	Find File.
) confirm that eligible resembers should be coned euromatically.

Click <u>here</u> for more information about uploading a file to Standard Life.

You can change the **Reason for Reduced Employee Contributions** if you want to by

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 'Next'
- 4. On the **Period for Contribution Schedule** screen. choose the 'Pay Frequency' and 'Pay Period' you processed the payroll for and want to create the Standard Life file
- 5. In the **Who to include** section, accept the default of 'All'
- 6. Click 'Next'

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

- **10.** 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.
- 11. Click 'Next'
- 12. You must inform Standard Life of any employees that didn't have a pension contribution taken or made a reduced contribution.

clicking in the field and selecting another option.

Code	Surname	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions	Date of Partia Non-payment
7	Cross	Samantha	SZ673764A	480.77	0.00	1st payment withheld or not deducted	

Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude Until
1	DUTTON	Кауе	NH897237A	16/06/2014		



Surna

From

To

Selected

Forename

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Reriod for Contribution Schedule

Period No 11 🖨

الم 💿

Pay Period

Pay Frequency

Who to include

elected Employ

Code





- 13. Click 'Next'
- 14. On the Standard Life G2G Contribution Schedule for...screen, click 'Print' to print a report of the employees that are included in the file.
- 15. 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
- Standard Life G2G Contribution Schedule for 16/06/2014 to 22/06/2014
 ×

 Summary of file contents
 Total Pensionable Earnings
 3013.05

 Total Employer Contributions
 9.72

 Total Employee Contributions
 6.02

 Number of employees with Reduced Contributions
 1

 Number of Employees with Excluded Contributions
 0

 Total number of employees included in the file
 10

Standard	Life G2G file created	x
j	The Standard Life G2G - Contributions Schedule file has been created successfully in C-\IRIS Payroll\Standard Life G2G\ The file name is Standard Life G2GCS00002014061620140622.csv	
	ОК	

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'



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

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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'

Schore sum	-	,000										
Scherke name Payroll-date			12-2018									
Latence date for	· payment		01.0014									
Confirm Cr	dumn Heads	112										
	Slumm Heads		disalizant below									
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Click <u>here</u> for more information about uploading a file to 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	
1	Tel:	0300 200 3600	Tel:	0300 200 3200
1	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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