

IRIS PAYE-Master

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

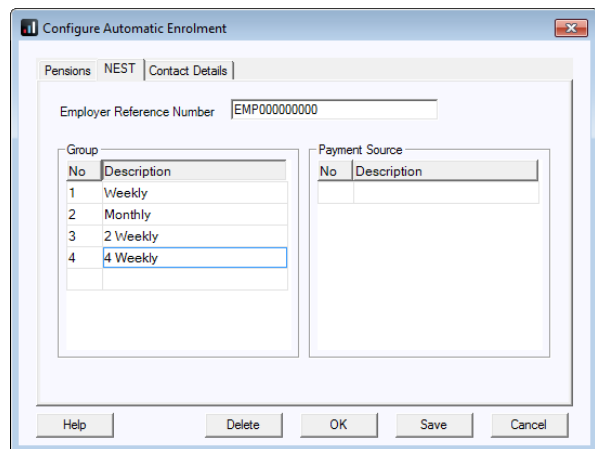
Standard Life Configuration

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.

Company Configuration:

1. Go to the **Pensions** menu, select '**Configure Auto Enrolment**'
2. On the **Configure Automatic Enrolment** screen, select '**NEST**' tab
3. In the **Employer Reference Number** field, enter a dummy number such as '**EMP000000000**'
4. In the **Group** section, create your site codes by typing directly into the **Description** field, for example 'Weekly' and 'Monthly'
5. Click '**OK**'

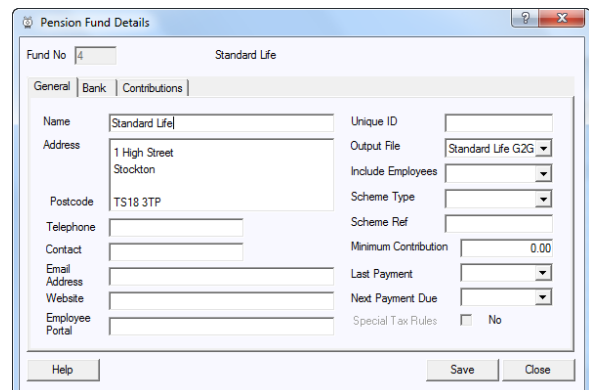


Pension Fund configuration

Please Note: You may have completed the Pension Fund configuration when you created the pension deductions.

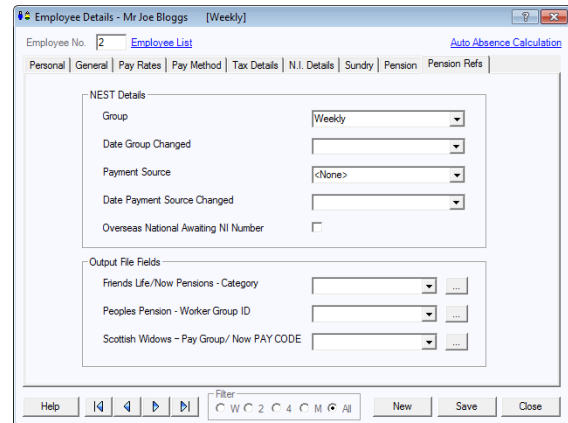
1. Go to the **Pensions** menu and select '**Configure Pension Fund Details**'
2. Select the Standard Life pension fund and click '**Edit**'
3. On the **General** tab, in the **Output File** dropdown field select '**Standard Life G2G**'

In the **Include Employees** field, select '**This fund only**' (unless you have been told a different option by Standard Life)
4. Click '**Save**' and then '**Close**'



Employee Configuration:

1. On the left-hand Selection Bar, select the appropriate employee to open their **Employee Details**
2. Select '**Pension Refs**' tab
3. Select the appropriate Site Code in the **Group** dropdown field for each employee that is a member of the Standard Life scheme
4. Click '**Save**' and then click '**Close**'

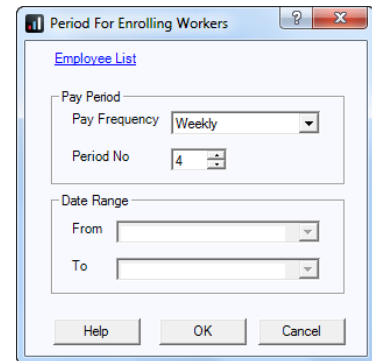


Joiners File

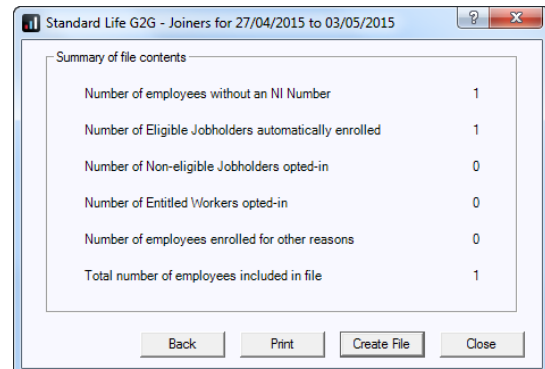
You should send a Joiners output file to Standard Life if you have any employees automatically enrolled or opted in the pay period.

Create Standard Life G2G Joiners file:

1. Go to the **Pensions** 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, select the '**Pay Frequency**' and '**Period No**' you processed the payroll for and had employees automatically enrolled or opted in
5. Click '**OK**'

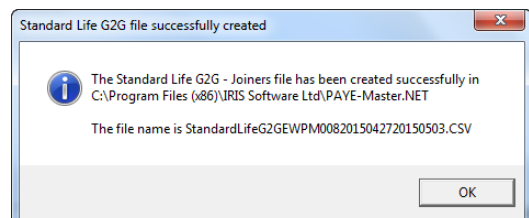


6. On the **Standard Life G2G - Joiners for...** screen, click '**Print**' to print a report of the employees that are included in the file.
7. Click '**Create File**' to create **Standard Life G2G** file



Summary of file contents	
Number of employees without an NI Number	1
Number of Eligible Jobholders automatically enrolled	1
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 file	1

8. On the **Save As** screen, choose the location where the **Standard Life G2G Joiners** file will be created and then click '**Save**'
9. A message will advise the location where the **Standard Life Joiners** file has been created

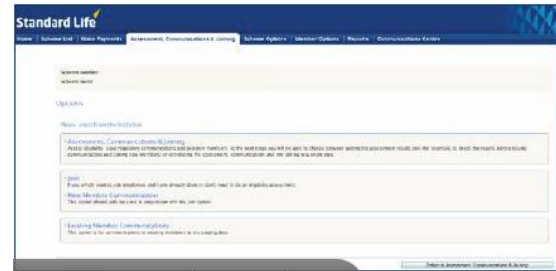


The Standard Life G2G - Joiners file has been created successfully in
C:\Program Files (x86)\IRIS Software Ltd\PAYE-Master.NET

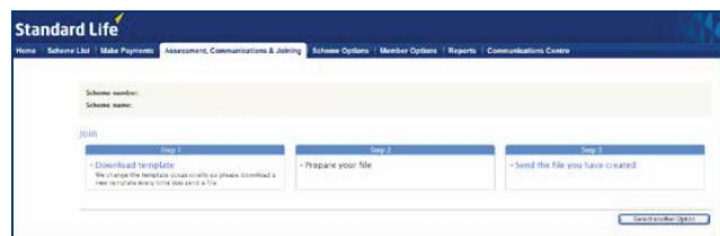
The file name is StandardLifeG2GEWPM0082015042720150503.CSV

Upload Standard Life G2G Joiners file:

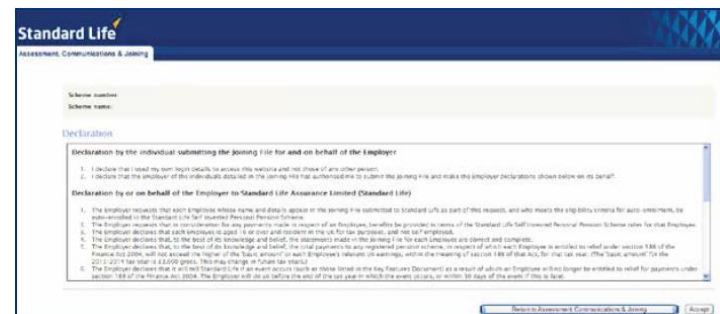
1. Login to your GPZ
2. On the **Home** page, select the '**Assessment, communications and joining**'
3. On the **Assessment, communications and joining** page, select the option '**Assessment, communications and joining**'
4. On the **Options** page, select '**Join**'



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**'



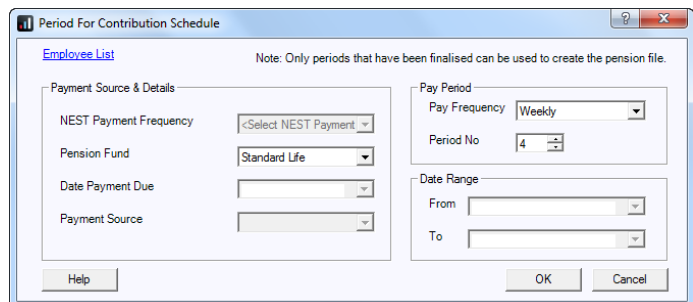
Click [here](#) for more information about uploading a file to Standard Life.

Payments file:

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

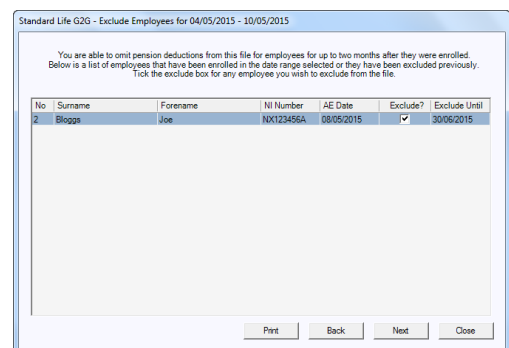
Create Standard Life G2G Payments file

1. Go to the **Pensions** 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, the **NEST Payment Frequency** field is disabled
5. In the **Pension Fund** field, choose your Standard Life fund
6. **Date Payment Due** and **Payment Source** fields are disabled
7. Choose the **Pay Frequency** and **Period No** you processed the payroll for and had employees and/or employer pension contributions taken. Only periods that have been finalised can be used to create the pension file.
Date Range fields will be disabled.
8. Click '**OK**'



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.

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

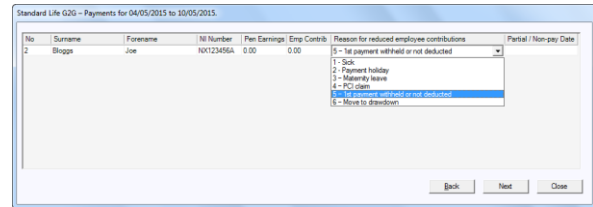


No	Surname	Forename	NI Number	AE Date	Exclude?	Exclude Until
2	Bloggs	Joe	NI123456A	08/05/2015	<input checked="" type="checkbox"/>	30/06/2015

11. You must inform Standard Life of any employees that didn't have a pension contribution taken or made a reduced contribution.

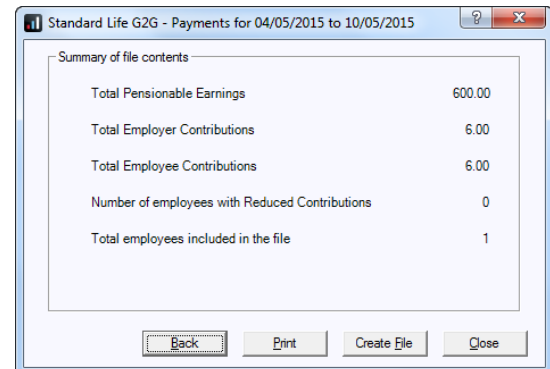
You can change the **Reason for Reduced**

Employee Contributions if you want to by clicking in the field and selecting another option.

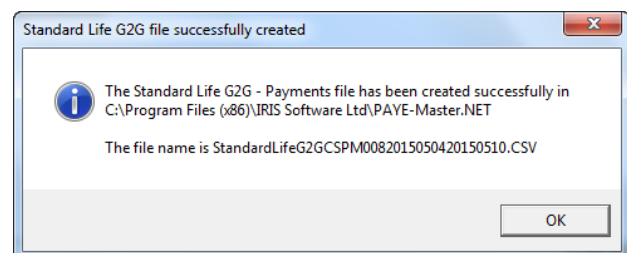


12. Click 'Next'

1. On the **Standard Life G2G - Payments for...**screen, click 'Print' to print a report of the employees that are included in the file.
2. Click 'Create File' to create the **Standard Life G2G Payments** file

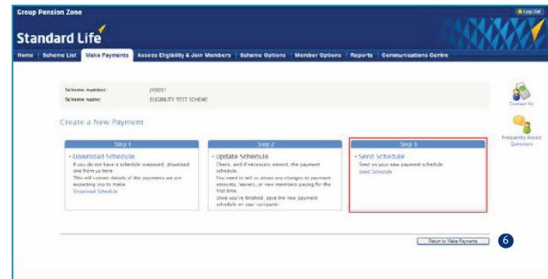


13. On the **Save As** screen, choose the location where the **Standard Life G2G Payments** file will be created and then click 'Save'
14. A message will confirm the location where the **NEST Contribution Schedule** file has been created

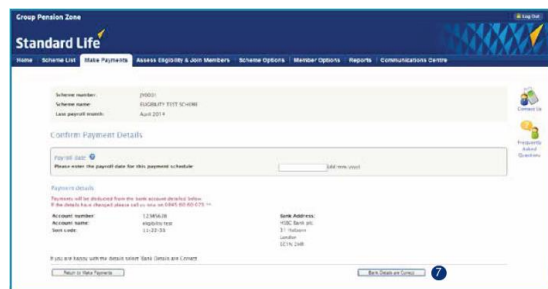


Upload Standard Life G2G Payments file:

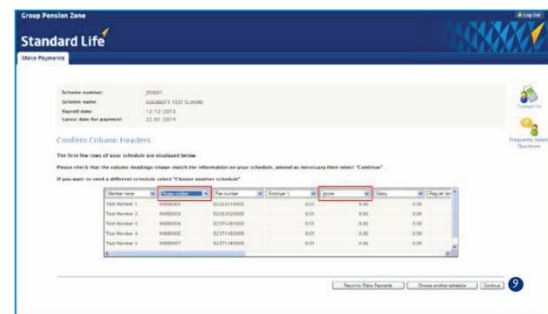
1. Login to your GPZ
2. On the **Home** page, select the **'Make Payments'**
3. In the **Step 3** section, select **'Send Schedule'**.
There is no need to complete the other steps because your payroll has created the file for you



- 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**'



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 then click **'Continue'**



Click [here](#) 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
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