



Release Notes

IRIS Payroll

April 2017 & Patches



Dear Customer

Welcome to your software update for Tax Year 2017/2018. This update of the software includes some new features and enhancements as well as the legislative changes required. These notes provide information on all the improvements to the software; for detailed information on legislative changes, click [here](#). If you encounter any difficulties please visit: <http://www.iris.co.uk/contactus>

The minimum system requirements can be found on our website:

- [IRIS Payroll Business](#)
- [IRIS Bureau Payroll](#)

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Reports

The issue with the following reports missing off periods, after changing the pay frequency from monthly to any other pay frequency, has been resolved:

- P11 Working Sheet
- P60s
- Payroll Summary with YTD
- Company Costs
- Year to Date Summary

Pay Elements Analysis Report

The Pay Elements Analysis will now display the value paid for holidays.

Payroll Summary with Year to Dates

For companies with configured departments, the Payroll Summary with Year to Dates will now order by name or code.

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PAYE Legislation

Apprenticeship Levy

Funding for apprenticeships is changing and employers will be required to contribute to a new apprenticeship levy. The new Apprenticeship Levy has been introduced from the 2017/18 tax year. Details on the legislation changes can be found in the [Legislation Guide](#). Changes to the software to incorporate Apprenticeship Levy are detailed below.

If **Apprentice Levy** in **Company Details** is not set, Levy will not be calculated and values will not be populated into the new month end processing fields for Apprenticeship Levy; **Pay Bill, Allowance and Levy**.

Levy allowance can be split across multiple companies with the same PAYE Reference but the maximum allowance must not exceed £15,000. You will pay the levy if your pay bill exceeds £3million per tax year, pro-rated on a monthly basis.

In order for the necessary calculation to work for Levy Allowance, it is essential that Month End Processing is performed.

If you are moving a company mid-tax year onto IRIS Payroll, you must enter the **Pay Bill YTD** and the **Levy Paid YTD** in the **Apprenticeship Levy** screen.

Changes to the Software for Apprenticeship Levy

Company Details

To cater for the new Apprenticeship Levy Allowance, the following new fields have been added to the **Company Details | Company** tab under the section **Apprenticeship Levy**:

- **Apprenticeship Levy**
- **Apprenticeship Levy Allowance** – this field will only be enabled if Apprenticeship Levy is set

Month-end Summary screen

A new button has been added to the **Month End Summary** screen. This opens a new screen **Apprenticeship Levy** where you can view the **Pay Bill, Allowance and Levy Paid** data for each tax month. From this screen you can also view **Pay Bill YTD, Allowance YTD and Levy Paid YTD**.

If you started using IRIS Payroll part way through the tax year, transferring from another payroll system, you can enter the values on this screen.

Quick Calculator

A new tab, **App. Levy**, has been added to the **Quick Calculator**. This tab contains the following fields:

- **Month** – select from drop-down
- **Annual Allowance**
- **Pay Bill To Date**
- **Levy Already Paid**
- **Apprenticeship Levy Due**

Year-End Restart Process

When moving into the new tax year (2017/18 only) using the **Year-end Restart** process, you will receive a message asking you to confirm the value of **Apprenticeship Levy Allowance** being claimed. In future years, if the default allowance is set to the current maximum, it will be set to the maximum allowed in the new tax year.

During the **Year-end Restart** process:

- **Company Details | Apprentice Levy** will be set by default
- You must choose the maximum or minimum allowance for the 2017/2018 tax year or enter the value of allowance you require which cannot exceed £15,000

Apprenticeship Levy

The following reports have been amended to include the new **Apprenticeship Levy** and **Apprenticeship Levy Allowance** fields:

- **Company Details Report**
- **Month End Summary**
- **Tax/NI/Pension Report**
- **Employer Payment Summary (EPS)**
- **Company Costs Summary (Apprenticeship Levy only)**
- **Employers' Annual Return (Apprenticeship Levy only)**
- **P30 Summary (Apprenticeship Levy only)**

National Insurance

Following legislative changes, the payroll software will now accept KC National Insurance Number prefixes.

Tax, NI, SSP, SMP, SAP, SPP & ShPP

The rates for tax, NI and statutory payments have been updated for 2017/2018.

Tax Code Changes

In line with legislative changes, moving into the new tax year (2017/2018) will automatically uplift tax codes as required.

Student Loan Thresholds

The annual thresholds for 2017/18 are:

- Plan Type 1 - £17,775
- Plan Type 2 - £21,000

RTI

Earlier Year Update (EYU)

The EYU has been updated in line with schema changes. Some minor amendments have been made to field descriptions.

When sending an EYU for 2016/2017 onwards the following fields have been removed/added:

Removed

- ECON
- SCON
- PT to UAP
- UAP to UEL
- NI Rates D, E, L, I and K

Added

- Flexible Drawdown Group
 - Flexibly accessing pension rights
 - Pension death benefit indicator
 - Flexible drawdown taxable payment
 - Flexible drawdown non-taxable payment
- PT to UEL
- NI Rate H

Employer Payment Summary (EPS)

Following legislative changes, from the 2017/18 tax year, the EPS will now include **Apprenticeship Levy** values.

Full Payment Submission (FPS)

The FPS has been updated with legislative changes for the 2017/18 schema.

Car & Fuel Benefits

From 2017/2018 Tax Year, we have added the ability to process Car and Fuel Benefits through payroll. The relevant fields have been added to the FPS and new fields to cater for these changes have been added to the software for instance, from the **Company** menu a new **Configure Company Car Details** option is available.

Further information can be found in the following guides:

- **Car & Fuel Benefit in Payroll**
- **Legislation Guide**

NEST

If assumed pensionable pay is entered for the **NEST Contribution File**, the reason for the reduced earnings field 9 will be set to **3 Member is on family leave**.

Reports

Employment Allowance

Employment Allowance has been added to the following reports:

- **Company Costs Summary**
- **Tax/NI/Pension Report**

Earlier Year Update – Employee YTDs Report

The following fields has been added/removed from the Earlier Year Update – Employee YTDs Report:

- **NI Earnings 1d** has been removed
- **Flexible Drawdown Taxable Payment** has been added
- **Flexible Drawdown Non Taxable Payment** has been added
- **Flexibly Accessing Pension Rights** has been added
- **Pension Death Benefit** has been added

P60 Report

The P60 has been updated in line with legislative changes.

Month End Summary

If a **Student Loan Refund** has been processed, the **Month End Summary** will display the following message:

A Student Loan refund is included in this report which has reduced the Amount Due figure to pay to HMRC.

Getting Started Guide

The **Help | Getting Started** has been renamed **Getting Started Guide**. The drop down menu has been removed and the following information can now be found on the **Knowledge Base**:

- **Creating a Company**
- **Configuring your Payroll Calendar**
- **Configuring Pay Elements**
- **Creating an Employee**
- **Creating a Department**
- **Configuring Holidays**
- **Payroll Cycle**
- **Report Manager**

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 contributions, 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	gpsupport@iris.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	earniesupport@iris.co.uk