



IRIS Bureau Payroll

Release Notes 2014-2015

01/09/2014



Dear Customer,

Welcome to your software update for 2014/2015. This update of the software includes some new features and enhancements. These notes provide information on all the improvements. If you encounter any difficulties please visit: www.iris.co.uk/contactsupport

The minimum system requirements can be found on our website:

- **IRIS Payroll Business**
- **IRIS Bureau Payroll**

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Summer Release Notes V2.11.*

IRIS OpenEnrol

IRIS OpenEnrol is a new module that has been added to the software. IRIS OpenEnrol is a new way to distribute pension communications to employees. Any letters that need to be sent to employees, in order to comply with legislation, are created automatically when you run payroll. They will then be published to the secure online IRIS OpenEnrol portal. Once employees have registered with the portal they are able to quickly view all of their letters in an easy to access, secure area. If an employee does not have an account but has an email address configured, they will receive a prompt to configure their account.

Note: To purchase the **IRIS OpenEnrol** module, please contact our sales team.

Automatic Enrolment Summary

The **Automatic Enrolment Summary** has been amended and will now include any changes to **Worker Status** occurring during payroll run. However, if you make a manual change to an employee's **Worker Status** in **Employee Details**, this will not be shown. If you have **Audit** enabled manual changes will be recorded here.

Opt-out

Following the installation of this update, if an **Opt-out** date is entered into **Employee Details | Pay Elements | Pension** a message will be displayed asking you to confirm you require the employee's pension deduction standard value for the associated **Pension Fund** to be set to zero.

Please Note: If your employee has other pension deductions assigned that are not associated to the Pension Fund, these will have to be set to zero manually.

Payroll – Auto Enrolment / IRIS OpenEnrol

When you recalculate the payroll, employees will now be re-assessed in relation to **Auto Enrolment** and **IRIS OpenEnrol**. For example, this could result in standard pension deductions being assigned or Auto Enrolment dates being unset.

Online Login Details

In the **Admin** section of the software, **OpenPayslips Login Details** has been renamed **Online Login Details**.

Employee Details

Transitional Period

A new tick-box, '**Transitional Period**' has been added to **Employee Details | Pay Elements | Pension**. This is to be used when an employee has the right to join a Defined Benefits or Hybrid Pension Scheme and you are applying a **Transitional Period**.

Please Note: The **Transitional Period** should be ticked prior to running the employee's first payroll under automatic enrolment. If you have the **IRIS OpenEnrol** module, this triggers Letter 1T as part of the legislative requirements.

Transitional Period has also been added to the available import/export fields. It has also been added to **Company | Global Changes | General**.

Member of Qualifying Scheme

Member of a Qualifying Scheme will now be automatically be ticked if the following apply:

- A **Pension Fund** has been selected in **Employee Details** and
- The **Pension Fund** has the **Qualifying Scheme** box ticked via **Pension | Configure Pension Fund | Add** or **Edit**

Pension Status Report

Transitional Period has been added to the **Pension Status Report**.

Configure Auto Enrolment

A new tab, **Contact Details**, has been added to **Pension | Configure Auto Enrolment**. This enables you to enter your contact details specific to pensions. It is essential to complete these fields if you are using IRIS OpenEnrol.

A new **Link to OpenEnrol** tick box has been added to the **Pension | Configure Automatic Enrolment** screen.

Further information regarding the above can be found in the **Pensions Guide**.

Contributions Ceased Date

Employees with a **Contributions Ceased Date** entered in **Employee Details | Pay Elements | Pensions** and have never been automatically enrolled will now be assessed. If they meet the qualifying criteria, they will be automatically enrolled.

Configure Pension Fund Details

The following fields have been added to the **Pensions | Configure Pension Fund Details | Add New/Edit**:

- **Email Address** – this allows you to specify an email address at the Pension Company for employees to send Pension queries to
- **Website** – here you can specify the Pension Company's website
- **Employee Portal** – enter here the Pension Company's Employee Portal, if applicable
- **Scheme Type** – select the scheme type from the drop-down list
- **Qualifying Scheme** – specify if the **Pension Type** is a **Qualifying Scheme**. If you tick this option, you will be asked if you want to set all employees in this fund as a **Member of a Qualifying Scheme**.

Note: Member of a Qualifying Scheme should be selected, if applicable, prior to running the payroll for the first time under Auto Enrolment.

Note: If you have a **NEST Pension Fund**, the **Qualifying Scheme** will be ticked automatically and employees will have **Member of a Qualifying Scheme** ticked.

Direct Earnings Attachment

Direct Earnings Attachment (DEA) has been renamed **Direct Earnings Attachment – Percentage**.

A new **Direct Earnings Attachment - Value (£)** has been added to the **Payments & Deductions | Configure Attachment of Earnings Orders | Add New/Edit | Type** to allow you to specify a fixed amount rather than using the tables/percentage method.

The **Direct Earnings Attachments** will no longer include a carry over where either a partial deduction or no deduction is made. However, you can enter a shortfall manually if there was an instance where you had not deducted the **Direct Earnings Attachment** when it should have been.

Direct Earnings Attachment Reports

Direct Earnings Attachment – Value (£) has been added to **AEO & Loan Summary By Employee** and **AEO & Loan Summary By Agency**.

Payroll Summary

The **Payroll Summary** now includes information for employees that have been advanced and **Payroll Summary with Year To Dates** will now include advance and leaver information.

IRIS OpenPayslips/P60s

Reports

A new report has been added specifically for use with the IRIS OpenPayslips module.

Unpublished

The option to print payslips and P60s for employees with no email address, which therefore cannot be published, has been added to the software.

The option 'Print unpublished payslips' has been added to the Report Preview screen, Payslip Options | Additional Options section

A **Print Filter** option has been added to the toolbar when printing P60s. **Print Filter** will give you the following options from a dropdown menu:

- All Employees
- Employees with email address
- Employees with no email address

To purchase the **IRIS OpenPayslips/P60s** module, contact our **Sales Department**.

Paying Expenses

A change has been made to the **Pay Preview** screen; net payments and Nlable only payments will now be displayed as **Payments** rather than negative **Deductions**.

Other Payments has been added under the **Pay Year-to-date** section of the **Pay Preview** screen.

Finalise Remaining Periods

A tick box, '**Finalise all remaining periods**' has been added to the **Pay Period Set Up Wizard** screen. This function will automatically finalise all periods for the selected pay frequency up to the end of the tax year.

Earlier Year Update

A new report has been added to the software, **Employee YTDs** report. This report is available for selection from **Report Manager | Employee Reports**.

Please Note: You must print this report **prior** to adjusting an employee's year to-date figures in **Employee Details**.

Configure Auto Enrolment

Default Pension Deduction

You can now amend the **Pension Payments & Deductions Value** on the **Configure Automatic Enrolment | Pension** screen. To amend, click '**Edit Values**', make the change and then click '**Save**' then '**OK**'.

Pension Fund

In **Configure Auto Enrolment | Pensions**, the field **Pension Fund** has been renamed **Default Pension Fund**.

Support Tab

A new button '**Support**' has been added to the **Help** tab, **Support Tools** section. This button will provide a dropdown menu to assist you with any queries you may have. The **Remote Assistance** button has been moved from **Support Tools** to the **Support** dropdown menu.

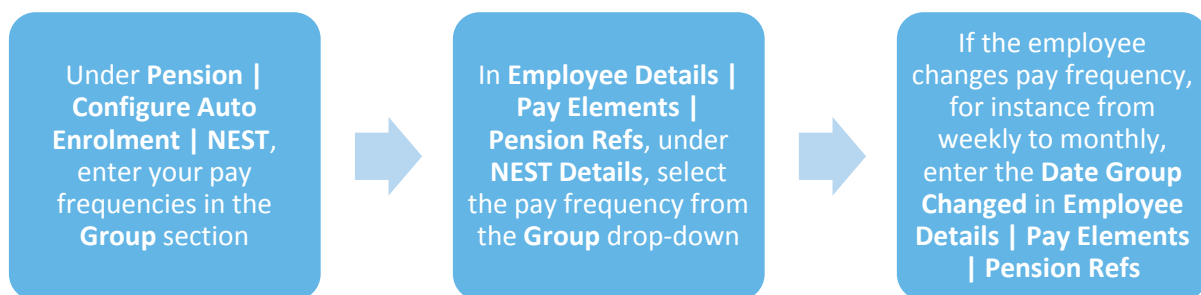
- **Call Wait Times** – view our call waiting times
- **Check Version** – check you are using the latest release, download the latest release and view release notes
- **Document Library** – a link to our document library containing useful guides and information regarding your software
- **Email Support** – send an email to our experienced support representatives
- **HMRC Updates** – keep up to date with HMRC news and changes
- **Knowledge Base** – answers to common questions
- **Remote Assistance** – allows our support representative to connect to your desktop if required

Pension Output Files

Under Pension | Create Pension File we have added the following formats:

- **Now Pensions v1.1**
- **Scottish Widows Version 3**
- **Standard Life G2G Joiners**
- **Standard Life G2G Payments**

If you have multiple pay frequencies for a Company and you are using the **Standard Life G2G Pension Output Files** the following steps need to be taken:



Please Note: The Standard Life G2G file only requires a **Reason for Reduced Employee Contribution** if there is a zero contribution.

Please Note: If you experience problems uploading your output file, we recommend you check the file version with your pension provider

On Hold/Advanced

Changes have been made to simplify the process if you have no employees to pay in a period. If the system recognises that there are no employees found to pay in the period and you need to move the **Payroll Calendar** to the next period, a message will be displayed asking if you want to update the **Payroll Calendar**. If you click **'Yes'** to the message, the **Payroll Calendar** will be moved to the next period for the pay frequency.

Employer Payment Summary

The option to submit an EPS when there are no employees in the Company has been added to the software. This allows you to submit an EPS detailing CIS Suffered when there are no PAYE employees to report.

Auto Enrolment Summary for Period

A new report, **Auto Enrolment Summary for Period**, has been added to **Print Pension Reports**. This report can be printed each period to see which employees have been auto enrolled in the selected period and which employees haven't together with the reason why.

Reasons not Automatically Enrolled will be detailed as one of the following:-

- **Earnings too low** – this will be shown for any employees whose earnings are below the Automatic Enrolment trigger threshold or below the Qualifying Earnings lower threshold
- **Aged 16-21**
- **State Pensionable Age**
- **Age 75+**
- **Deferred** - displays all employees with a **Deferral Date**

Report Changes

Pension Status Report

The **Pension Status Report** will now display the **Pension Fund** as detailed in **Employee Details | Pay Elements | Pensions | Pension Fund**.

Pension Fund Employees Report

Changes have been made to the **Pension Fund Employees Report** allowing you to filter the report by Department.

Moving an employee

New fields have been added to the software to allow you to transfer employees from one company to another, where the PAYE reference is the same, without having to include starter/leaver details on the FPS.

A new tab **System Settings** has been added to the **Application menu | Options** button. Here you can choose **Display Send Leave Date? On the issue P45 screen**. With this option ticked, **Send Leave Date** will be displayed on the **Issue P45 for....** screen. If you want the setting to be copied to all companies, click **Apply to All Companies** and then **Yes** to the message, then **OK**.

Previous Employee Code has been added to **Starter Details | New Starter** screen for you to enter the employee code from the original company.

These fields should **ONLY** be used when transferring an employee to another company with the same PAYE reference or if you are moving from another payroll system to IRIS software and are using different employee codes.

Notional Salary

A **Notional** field has been added to **Employee Details | Pay Elements | Salary & Rates** tab which can be used to calculate employers' pension contributions when an employee is on unpaid or part-payment family leave and the employer still contributes to pension based on normal pay. A new tick box has also been added to the **Enter Variations | Statutory Payments** tab, '**Use Notional Pay for employer's pension**'. With this box ticked, the software will use the **Notional** amount when calculating the Employer's pension contribution instead of **Pensionable Pay**.

To use this function:

- If necessary, enter the **Notional** amount in **Employee Details | Pay Elements | Salary & Rates** tab.
- In **Pay Variations** for the employee, under the Pay section, tick the box '**Use Notional Pay for employer's pension**'

Please Note: Once the box is ticked, it will remain ticked for subsequent payrolls for the employee until it is un-ticked. You need to have the Pension module enabled and the pension deduction assigned.

Import/Export

Following the introduction of Workplace Pension Reform, the following fields have been added to these areas of the software:

Import Data:

- Contributions Ceased
- Pension Fund
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID

Please Note: Pension Funds will need to be configured prior to importing

Export Data

- Contributions Ceased
- Pension Fund
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID
- Staging Date

Global Changes

- Automatic Enrolment Date
- Contributions Ceased
- Date Group Changed
- Date Payment Source Changed
- Deferral Date
- Opt-in/Join Date
- Opt-out Reference
- Pension Fund
- Pension Information Provided
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID
- Staging Date

Annual Scheme Indicator

The option to process an employee's payroll annually has been added to the software. It is reported to HMRC via the FPS. This method of calculation will use the annual thresholds for tax, NI and pension in two different ways:

Annual Scheme

The **Annual Scheme** is used when:

- All employees in the company are to be paid once in the tax year, in the same period
- The employer is only required to pay HMRC annually

To use an **Annual Scheme**, in **Company Details | Company** tick the **Annual Scheme** box. A message will be displayed asking you to confirm that all employees in this company will be paid annually, in a single tax month, and that you are only required to make payments to HMRC annually.

Please Note:

- If you are using the **Annual Scheme** indicator, you will need to calculate average earnings and enter statutory payments manually
- If employees have already been paid in the current tax year you will not be able to set the **Annual Scheme** indicator
- You will need to **Select the next Pay Date** for the annual payment in **Company | Payroll Calendar** for the appropriate pay frequency

Pay Annually

Pay Annually is used mainly for pension payments. Please note:

- Payments can be made to employees in different pay periods, for instance some employees in April and some in July
- Payments to HMRC can be made more than once a year
- You can place employees on hold until they require payment

To set an employee as **Pay Annually** go to **Employee Details | Tax & NI** tab and select **Pay Annually**.

Please Note: When using either **Pay Annually** or **Annual Scheme**, if an employee has a week 1/month 1 tax code, the standard tax code will be used, not the week 1/month 1

Please Note: When using **Pay Annually** or **Annual Scheme** we recommend you enter statutory payments calculations/payments manually

Pension Summary for Period

A new report, **Pension Summary for Period** is also available in **Report Manager | Pension**. This report will show:

- Employee
- NI Number
- Notional Pay
- Pensionable Earnings
- Qualifying Earnings

To purchase the **Pension** module, contact our **Sales Department**.

Full Payment Submission

PAYE Ref

PAYE Ref has been added to **Print Summary** when submitting your FPS.

Zero Pay

Full Payment Submissions will now include employees who have been processed with zero pay.

Auto Update

We have added the ability to send messages to customers via the auto update process, allowing you to receive useful information without delay. Any messages will be available each time you log into the software.

You can choose to enable auto download messages by ticking the box in **Admin** under **File | Messages from IRIS**.

From **Help | Messages from IRIS** in IRIS Payroll, you can also view or delete old messages by highlighting the relevant **Message Type** and selecting '**View Message**', '**Delete Message**' or '**Delete All Messages**'.

Subtract Basic Rate Tax

In **Pension | Configure Pensions | Add/Edit**, the option to tick the box **Subtract Base Rate Tax** is now available for **Automatic Enrolment (Stakeholder)** pensions.

Default Printer

A new section, **Report Settings**, has been added to the **Report Manager**. This allows you to specify:

- Printer Name
- Paper Source
- Sort Order

The **Paper Source** drop down will display the available printer trays for the selected printer in **Printer Name**. If the chosen **Paper Source** is no longer available for the selected printer, the **Paper Source** will be set to default.

Pension Status Report

The following changes have been made to the **Pension Status Report**:

- Leavers will no longer be included on the report
- A new page has been added that will list employees that will include employee excluded from Automatic Enrolment, working outside the UK and no in any pension scheme. This page will be printed if **Fund** is set to '**All**' in **Report Options**

NEST Contributions Schedule – Withholding pension deductions

Employees who have been excluded on the **NEST – Exclude Employees for...** screen will now be included in the pension file created but with zero values.

Details of the **Number of Employees with excluded contributions** will be displayed on the **NEST – Contribution Schedule Confirmation** screen.

Full Payment Submission

The FPS has been changed to only include leavers and employees with payment after leaving in the next FPS sent for the pay frequency the employee is set too.

Aviva Joiners Category ID

Aviva Joiners Category ID will now be set to **Friends Life/Now Pensions Category ID**.

Configure Client Reports (IRIS Bureau Payroll only)

The **Email Address** field in **Reports | Configure Client Reports** has been extended.

Configure Pension Fund

The following tick boxes have been added to **Pension | Configure Pension Fund | Edit/Add New, Output Files** section:

- **Add Employee contributions to Employers**

'**Add Employee contributions to Employers**' is to be used for certain salary sacrifice pensions where configuration on the pension provider website is set for employer contributions only. If configuration is set this way, the pension provider expects the employee contributions to be zero.

With **Add Employee contributions to Employers** ticked, when you create the output file, the employee contribution can be added to the employer contribution resulting in the employee contribution being set to zero in the output file.

Restoring Leavers

HMRC now allow you to restore a leaver, in the current year, and continue to pay the employee where the leaving date has already been submitted via an FPS. This function would generally be used in the scenario where you have made the wrong employee a leaver and already submitted the FPS.

When you restore a leaver, a message will be displayed giving you the options to:

- Continue paying the employee or make an adjustment to their final pay or
- Make an additional payment to the employee after they have left

Bespoke Pension Files

The facility has been added to allow the creation of bespoke pension files.

If you have a bespoke pension file, this will be accessed via **Pension | Create Pension File | Select file to create.**

For further information please contact our sales team.

NEST Contribution Schedule

The **NEST - Contribution Schedule** version 5 will be installed automatically when the update is installed.

NEST now permit the **NEST - Contribution Schedule** to include employees paid in the **Date Range** selected but who have a **Leaving Date** prior to the start of the **Date Range**.

Pension FAQs

A new button has been added to the **Pension** tab called **Pension FAQs**. This will link you to the IRIS website offering you advice with regards to frequently asked questions.

IRIS OpenBooks Export

If you have the **IAS Integration Module, Employment Allowance** has been added to the OpenBooks export file.

Theme Options

Under **Application menu | Options | System Settings**, a new feature has been added, **Theme Options**. This allows you to choose from the following settings:

- Classic
- Dark
- Silver

April 2014 Patch Release Notes – Version 2.10.76

Pension Output Files

The overflow error that was occurring when creating a **Pension Output File** has been resolved.

NEST Contribution Schedule

The issue with the worker count in the NEST Contribution Schedule Trailer has been rectified.

NEST Enrolling Workers

An issue with commas missing from the NEST Enrolling Workers file has now been resolved.

NEST Payment Source & Group

Nest Payment Source and Group now allows the input in lowercase.

April 2014 Patch Release Notes – Version 2.10.75

FPS Late Reporting

When submitting an FPS on the pay date, the FPS Late Reporting message will no longer appear

P60

The issue has been resolved where the 'R' for a tax rebate was not showing on the following P60s:

- E-P60
- P60 Plain Paper
- Duplicate Plain Paper Laser P60

The issue where Plain Paper P60 and OpenPayslips P60s were printing out for all leavers, including previous tax years, has now been resolved

OpenPayslips/P60s

The error "Cannot connect to the IRIS Web Service" when publishing weekly P60s has now resolved

Email Address Validation

The problem with a sub-domain email address has been rectified

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Direct Earnings Attachment

Following the **Welfare Reform Act 2012**, you may be asked to take deductions directly from an employee's earnings by DWP Debt Management. A new **Direct Earnings Attachment (DEA)** has been added to the software under the **Attachment of Earnings** type list. These will be calculated in the background as a percentage using the relevant tables.

A **Direct Earnings Attachment** will not be deducted if the employee is only receiving one of the following:

- SMP
- OSPP
- ASPP
- SAP

Restore Leaver from Previous Year

The facility to restore a leaver from a previous tax year is now available. You can **only** use this function if you need to make a **Payment after Leaving**. The **Payment after Leaving** flag will be included in the next FPS and the payroll calculation for the individual will be based on OT week 1/month 1 tax code basis.

Normal Hours Worked Per Week

For the 2014/15 tax year, HMRC are introducing changes to the bandwidths for **Normal Hours Worked Per Week** including a new option. The bands from tax year 2014/15 are as follows:

- **A – Up to 15.99 hrs**
- **B – 16.00–23.99 hrs**
- **C – 24.00–29.99 hrs**
- **D – 30.00 hrs or more**
- **E – Other**

When you create a new employee in 2014/15, **Normal Hours Worked Per Week** will default to **E – Other**.

The bands will be updated when you move into the 2014/15 tax year. However, if you have employees whose **Normal Hours Worked Per Week** in the 2013/14 tax year fell between 24.00 and 29.99 hours, you need to manually amend the band via **Employee Details | Personal** and choose **C – 24.00 – 29.99 hrs**.

Reason for Late Reporting

On the **Full Payment Submission** screen under the section **Submission**, we have added **Reason for Late Reporting**. This is an optional field allowing you to decide if the FPS is late, and if so, what reason to select.

The reasons available for late submission are as follows:

- **None** (selected by default)
- **A – Notional Payment: Payment to Expat by third party to overseas employer**
- **B – Notional Payment: Employment related security**
- **C – Notional Payment: Other**
- **D – Payment subject to Class1 NICs but P11D/P9D for tax**
- **E – Micro Employer using temporary “on or before” relaxation**
- **F – No working sheet required; Impractical to report**
- **G – Reasonable excuse**
- **H – Correction to earlier submission**

If the late reporting applies to an individual as opposed to the whole submission, you will need to submit the FPS for the relevant employee only.

Please Note: From April 2014, failure to submit your FPS on or before the payroll date can result in fines from HMRC. If you are submitting an FPS after the payroll date, or maybe didn't include a leave date for an employee who left in the previous period, a **Reason for Late Reporting** must be sent to prevent any fines.

Student Loan

The **Student Loan** threshold is increasing to £16,910.

Starter Declaration

The default statement for **Starting Declaration | P46 not completed** will now be **Statement C** for **FPS** reporting purposes.

RTI BACS

A new RTI BACS report; **Clydesdale/Yorkshire/Co-op bank (RTI)** has been added to the software. To select this report go to the **Reports | Report Manager | BACS/Payments**. This new layout will include the RTI random number.

Earlier Year Update (EYU)

A new **Sundry** screen has been added to the **Earlier Year Update** facility allowing you to report to HMRC on the following:

- **Pension:** Gross pension deductions; net pension deductions and Trivial Commutation Payment
- **Benefits:** Benefits taxed in payroll

Employer Payment Summary (EPS)

HMRC now allow you to submit an EPS in the current month where:

- **No Employees paid in Current Month**

The following fields on the EPS have been added or renamed:

- **No employees paid (no Tax & NIC Liability)** to **No Employees paid in Current Month**
- **No Tax & NIC Payment is due to HMRC this month** to **No Employees paid in Current Month**
- **No Employees will be paid in Future Months** added to the EPS confirmation screen and EPS confirmation report
- **Are you a service company?** to **Are you a Service Company and have operated the Intermediaries legislation (sometimes known as IR35) or the Managed Service Companies legislation?**

The EPS can now include Company Bank Details; HMRC will use this information if a refund is due. To include this information tick the option **Use in EPS** via **Company | Company Details | Bank Details**.

SSP Recovery & NIC Holiday

In line with HMRC changes, from the 2014/15 tax year **SSP Recovery** and **NIC Holiday** have been removed. SSP should still be recorded and paid through the payroll.

P60 Plain Paper

The **P60 Plain Paper** and the **Duplicate Plain Paper P60** layouts have been updated in line with HMRC specifications.

Publish P60s

If you have the **OpenPayslips** module you will now have the opportunity to publish **E-P60s**. For further information contact our sales team or get details from our website at

<http://www.iris.co.uk/cloud-solutions/iris-openpayslips/>

Company Details

The field **Company Tax Reference** in the **Tax Reference** section of **Company Details** has been renamed **Corporation Tax Reference**.

Email Address

The **Email** field in **Employee Details | Personal** has been extended.

Employment Allowance

The option to claim **Employment Allowance** has been added

- The **Employment Allowance** indicator allows employers to claim up to £2000 for all businesses, charities and Community Amateur Sports Clubs which is to be offset against their Class 1 Secondary NICs
- **Employment Allowance** is per business, not PAYE Reference
- The money is not claimed from HMRC, it is simply not paid over to HMRC with your normal liability at the end of the month
- If you believe you are eligible, tick the box **Employment Allowance** in **Company | Company Details | HMRC**
- The selection will remain in place and does not need to be resubmitted at each new Tax Year
- The Year End Restart process will reset the **Employment Allowance**
- If you select this option you **must** send an EPS to inform HMRC even if the other EPS values are zero

You may need to redo month end processing if you make changes using Rollback to a month and have already processed further months.

For example:

- Process month end for month 1, 2 and 3 and reach the £2000 allowance
- Using Rollback pay an employee in month 2 that you originally missed
- Redo month end for month 2 but this then takes the **Employment Allowance** over £2000
- You will need to redo month end processing for month 3 to recalculate **Employment Allowance**
- Payments to HMRC will need to be adjusted accordingly

The **Employment Allowance** field should only be edited if you start using the software mid-year and have received some or all of your **Employment Allowance**. This field should show the amount remaining for the tax year

RTI Notifications

The ability to print **RTI Notifications** received from HMRC has been added to the software.

Getting Started Tab

The guides that were located under the **Getting Started** tab are now accessed via the **Help** tab.

Conversion

Following the introduction of **RTI** and **Workplace Pension Reform**, new fields have been added to the conversion program.

Correcting a Leaving Date on an FPS

If you submit an incorrect **Leaving Date** for an employee on an FPS you can correct this by restoring the employee and re-issuing the P45 with the correct leave date. HMRC will use the original leave date submitted for their records, not the amended date.

1. Highlight the relevant employee
2. Click **Restore Leaver**
3. Click **OK**
4. Then select **P45 Leaver**
5. Enter correct leave date
6. Click **OK**

Pension Changes

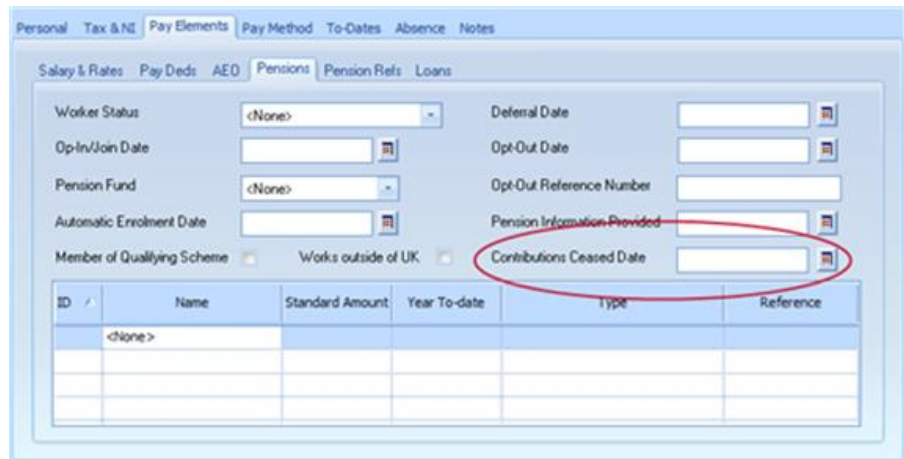
The following fields have been renamed:

- In **Pension | Configure Auto Enrolment | Pension**
 - **Deferral Period** has been renamed **Postponement Period**
 - **No deferral** has been renamed **No postponement**
- In **Employee Details | Pay Elements | Pensions**
 - **Postponement Date** has been renamed **Deferral Date**
 - **Opt-in Date** has been renamed **Opt-in/Join Date**
 - **NEST** tab has been renamed **Pension Refs**

Reports have been amended to reflect the renamed fields.

Contributions Ceased Date

A new field, **Contributions Ceased Date** has been added to **Employee Details | Pay Elements | Pensions**. This function has been added to accommodate instances where the ceased contributions indicator is required in the output file.



The screenshot shows the 'Pensions' configuration screen. The 'Contributions Ceased Date' field is circled in red. Other fields include Worker Status, Op-In/Join Date, Pension Fund, Automatic Enrolment Date, Member of Qualifying Scheme, Works outside of UK, Deferral Date, Opt-Out Date, Opt-Out Reference Number, and Pension Information Provided.

Deferral Date

When using a **Postponement Period**, **Deferral Dates** will be assigned to all employees at **Staging Date**, irrespective of **Worker Status**.

We have added a new postponement option, **Start of Second Pay Period**. This allows you to set the **Deferral Date** to be the first day of the pay reference period after the next pay reference period.

For example:

Start Date	Period Start Date	Period End Date	Deferral Setting	Deferral Date
20/12/2013	01/12/2013	31/12/2013	Start of next pay period	01/01/2014
20/12/2013	01/12/2013	31/12/2013	Start of next pay period + 1 pay period	01/02/2014

SCON Number

The field **SCON No.** has been added to two areas of the software:

- **Employee Details | Tax & NI | NI Information**
- **Pension | Configure Pension Fund** then **Add New** or **Edit**

A **SCON** number is mandatory for employees on NI Rate D, E or L for all Full Payment Submissions from 6th April 2014.

If the **SCON No.** field in the **Employee Details** screen is blank and one exists in **Configure Pension Fund Details**, this will be automatically included in the FPS.

Auto Enrolment Standard Pension Export Files

The following Auto Enrolment standard output pension export files have been added to the software:

- Aviva
- Friends Life
- Now Pensions
- Peoples Pension
- Scottish Widows

These funds appear in the **Configure Pension Fund Details | Output Files | File Output** dropdown. To select employees to include in the output file, click on the dropdown box and choose either **All Employees; This fund only** or **This fund + no fund**.

A new field **Unique ID** has also been added to **Pension | Configure Pension Fund Details**. This is initially for Peoples Pension and Now Pensions and will be supplied by the pension provider.

The following new fields have also been added to **Employee Details | Pay Elements | Pension Refs** allowing you to enter the relevant information, if required:

- **Friends Life/Now Pensions – Category**
- **Peoples Pension – Worker Group ID**
- **Scottish Widows – Pay Group**

System Requirements

To view the minimum system requirements please click [here](#).

Software available from IRIS

IRIS Payroll Basics

Free, RTI compliant payroll software for companies with fewer than 10 employees

IRIS Payroll Business

Intelligent, easy to use payroll software for smaller businesses

IRIS Payroll Professional

Flexible payroll software for medium sized businesses

IRIS Bureau Payroll

Intelligent management for multiple payrolls

KashFlow Payroll

Cloud-based UK payroll software – accessible from anywhere on PC, Mac or tablet

IRIS P11D

The easy way to complete employee expenses and benefits returns

IRIS HR Manager

The easy way to keep employee data up-to-date

IRIS OpenPayslips

A secure web based solution that allows your employees to access, and download their e-payslips via an online portal

Stationery order line

Tel: 0844 815 5656

HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: helpdesk@ir-e-file.gov.uk

HMRC employer helpline

Tel: 0300 200 3200

HMRC employer helpline (for new business)

Tel: 0300 200 3211

Support

Tel: 0844 815 5661 (option 5)

Fax: 0844 815 5665

Email: ipsupport@iris.co.uk