



# **Standard Life Pension File Creation**

**IRIS Payroll**

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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:

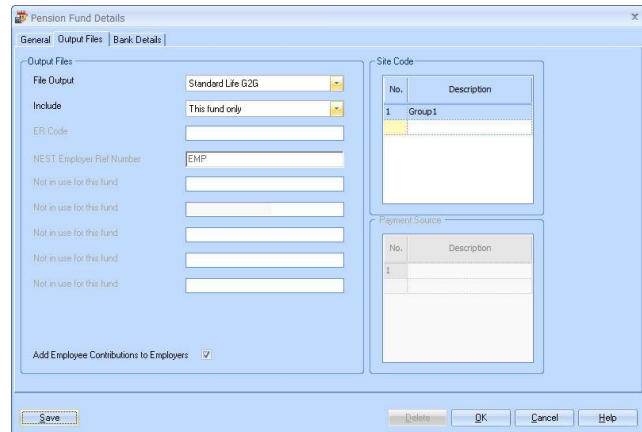
- Configuring output file information
- Creating an output file each period

## Standard Life configuration

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

1. Go to the **Pension** tab and click **Configure Pension Fund**
2. Select the Standard Life pension fund and click **Edit**
3. Select **Output Files** tab
4. In the **File Output** field, select **Standard Life G2G**
5. In the **Include** field, select '**This fund only**' (unless you have been told a different option by Standard Life)
6. If you have multiple pay frequencies, enter **Site Code** in the field
7. If you have Salary Sacrifice pension deductions, tick **Add Employee Contributions to Employers**



The screenshot shows the 'Pension Fund Details' dialog box with the 'Output Files' tab selected. The 'File Output' dropdown is set to 'Standard Life G2G' and the 'Include' dropdown is set to 'This fund only'. The 'NEST Employer Ref Number' is 'EMP'. The 'Site Code' table has one row: '1 Group1'. The 'Add Employee Contributions to Employers' checkbox is checked. The 'Payment Source' table is empty.

No.	Description
1	Group1

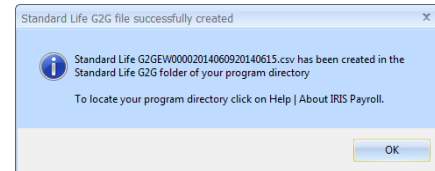
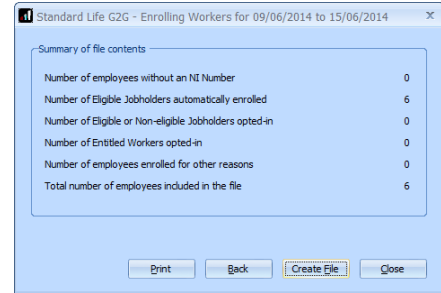
No.	Description
1	

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

8. Click **OK**



7. On the **Standard Life G2G – Enrolling Workers for...** screen, click **Print** to print a report of the employees that are included in the file.
8. Click **Create File** to create the **Standard Life G2G Joiners** file
9. A message will advise the location where the **Standard Life G2G Joiners** file has been created

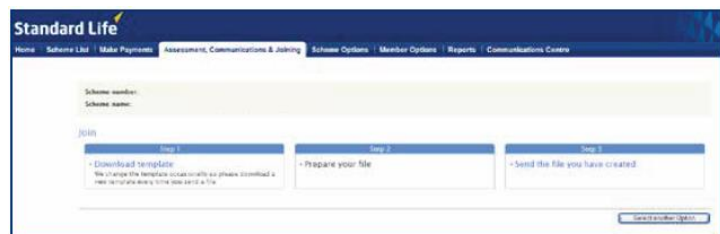


## Upload Standard Life G2G Joiners file

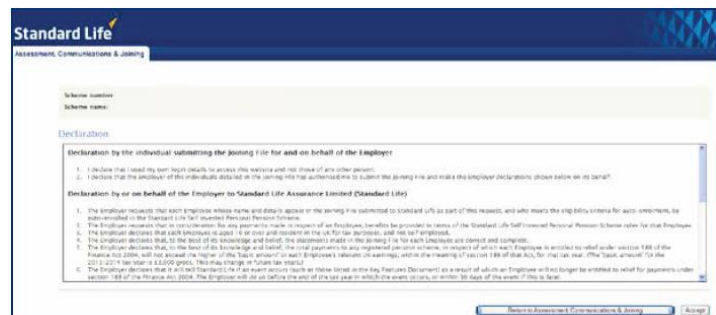
1. Login to your GPZ
2. On the **Home** page, select the **Assessment, communications and joining**
3. On the **Assessment, communications and joining** page, select the option **Assessment, communications and joining**
4. On the **Options** page, select **Join**



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**



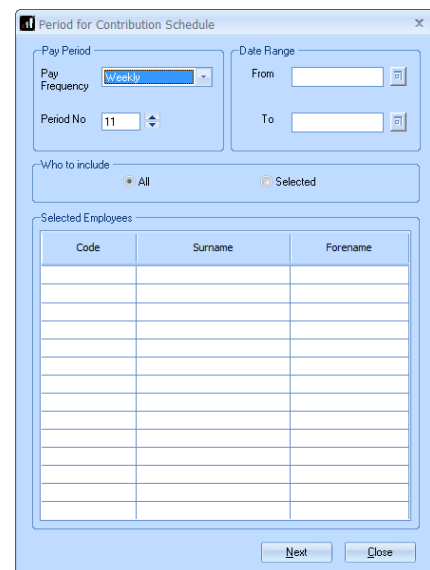
Please contact Standard Life for more information about uploading a Standard Life G2G Joiners file.

## Standard Life G2G – Payments file

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

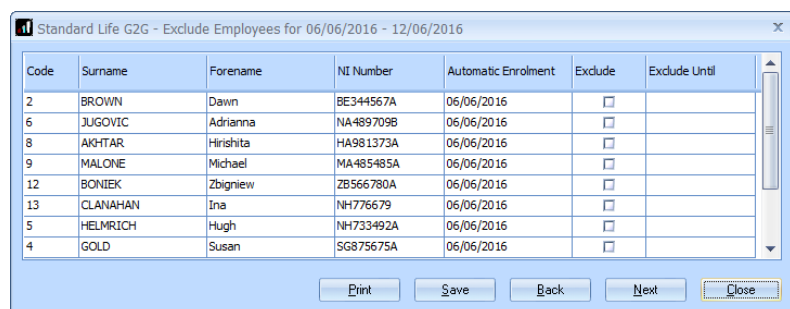
### Create Standard Life G2G Payments file

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**

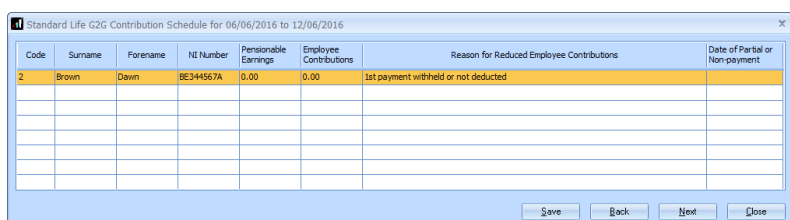


Your payroll has the ability to hold back contributions as per the Pensions Regulator's advice. However, Standard Life said they strongly prefer this option isn't used.

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



Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude Until
2	BROWN	Dawn	BE344567A	06/06/2016	<input type="checkbox"/>	
6	JUGOVIC	Adrianna	NA489709B	06/06/2016	<input type="checkbox"/>	
8	AKHTAR	Hirishita	HA981373A	06/06/2016	<input type="checkbox"/>	
9	MALONE	Michael	MA485485A	06/06/2016	<input type="checkbox"/>	
12	BONIEK	Zbigniew	ZB566780A	06/06/2016	<input type="checkbox"/>	
13	CLANAHAN	Ina	NH776679	06/06/2016	<input type="checkbox"/>	
5	HELMRICH	Hugh	NH733492A	06/06/2016	<input type="checkbox"/>	
4	GOLD	Susan	SG875675A	06/06/2016	<input type="checkbox"/>	

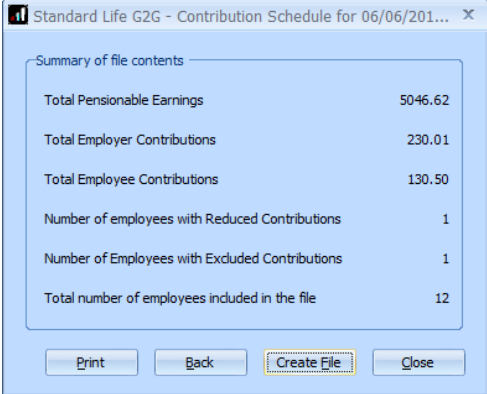


Code	Surname	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions	Date of Partial or Non-payment
2	Brown	Dawn	BE344567A	0.00	0.00	1st payment withheld or not deducted	

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



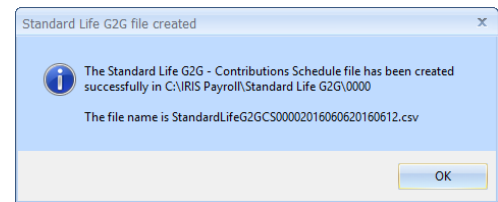
10. Click **Next**
11. On the **Standard Life G2G – Contribution Schedule for...** screen, click **Print** to print a report of the employees that are included in the file
12. Click **Create File** to create the **Standard Life G2G – Contribution Schedule** file



Summary of file contents	
Total Pensionable Earnings	5046.62
Total Employer Contributions	230.01
Total Employee Contributions	130.50
Number of employees with Reduced Contributions	1
Number of Employees with Excluded Contributions	1
Total number of employees included in the file	12

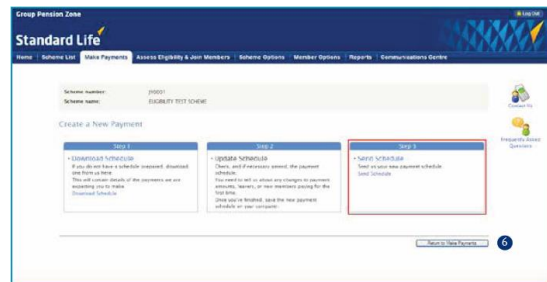
Buttons: Print, Back, Create File, Close

13. A message will advise the location where the **Standard Life G2G Payments** file has been created

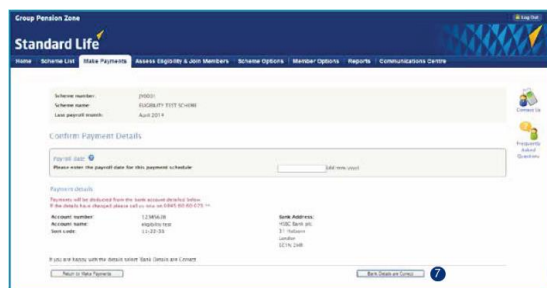


## Upload Standard Life G2G Payments file

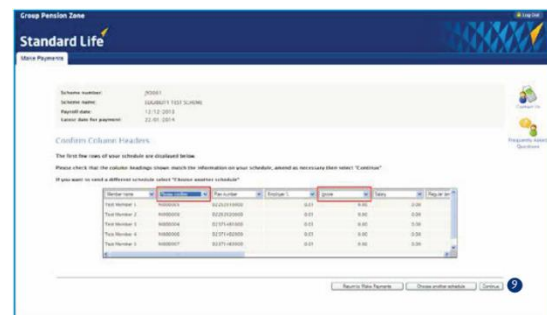
1. Login to your GPZ
2. On the **Home** page, select the **Make Payments**
3. In the **Step 3** section, select **Send Schedule**.  
There is no need to complete the other steps because your payroll has created the file for you



4. On the **Confirm Payment Details** screen, enter the pay period's **Payroll Date** for the file you're sending to Standard Life.
5. 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 the click **Continue**



Please contact Standard Life for more information about uploading a Standard Life G2G Payments file.

## 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