



# IRIS GP Payroll

Release Notes

Version 21.801.3

IRIS. Look forward

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## Release Notes

Welcome to your software update. This update of the software includes some new features and enhancements, together with any necessary legislative changes. 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: [www.iris.co.uk/contactus](http://www.iris.co.uk/contactus)

The minimum system requirements are on our website:

- **GP Payroll**

## GP Payroll Release 21.801.3

### Printing Reports

We have fixed the issue users were experiencing when printing reports and an error returned.

## GP Payroll Release 21.801

### Temporary Adjustments

We have now resolved the issue with temporary adjustments not displaying correctly when performing a payroll recalculation after previously calculating the payroll for a single employee.

### SD55 Report

Arranging employees into alphabetical order and selecting the **Print Output | Pension Summaries, SD55: Summary of employee payments** radio button now displays the correct report for the selected employee.

### Bank Export File

The error message displayed when creating a bank export file and running the payroll is now resolved.

### Payslips

When organised into alphabetical order, employees will now receive the correct payslip following a new payroll calculation.

## GP Payroll Release 21.800

### myePayWindow

#### myePayWindow Indicator

Following a new installation or reinstallation of the software, on **Setup/ Options | 2 - Passwords**, the **Use myePayWindow** indicator will no longer select by default.

#### Publish Date

To allow you to send a Publish Date to myePayWindow, on the **Print Output | Payslips, myePayWindow** frame, we have added a **Publish Date** label and date picker. Here you can

enter the date you require payslips to be available for employees to view in myePayWindow. myePayWindow records the information and only permits employees to view their payslips from this date. If left blank, the system will use the current date, and payslips will be available for employees to view immediately.

Select **Setup/ Options | 2 – Passwords, myePayWindow** field to enable the **Publish Date**.

## Publish Preview

When publishing any report, a **Publish Preview** screen will display showing a summary of the information before it is published.

## Other Improvements

An issue with publishing attempts failing due to employees having a leave date of 15 months or more from the current system date has been resolved.

## Employee Search and Filter Options

Following the increase of the employee limit in GP Payroll and to help with sorting and finding employees in the software, we have added additional functionality.

### Select Employees

A new **Select Employees** screen has been added to commonly used functions throughout the software. The new screen has options that will allow you to easily search for specific employees or groups of employees.

### Display

The **Display** dropdown allows you to specify the types of employees to include in your search. You can select from the following options:

- **All current employees** – lists all current employees (excluding partners)
- **All employees (inc. partners)** – lists all current employees and current year leavers (including partners)
- **All employees (exc. partners)** – lists all current employees and current year leavers (excluding partners)
- **All leavers** – lists all current year leavers
- **Normal staff (Type 1)** – lists current employees where **Type** is **1**
- **Staff with multiple roles (Type 2)** – lists current employees where **Type** is **2**
- **Relief staff (Type 3)** – lists current employees where **Type** is **3**
- **Doctor – registrar/trainee (Type 4)** – lists current employees where **Type** is **4**
- **Doctor – practice is pension provider (Type 5)** – lists current employees where **Type** is **5**

- **Doctor – HA is pension provider (Type 6)** – lists current employees where **Type** is **6**
- **Partners (Type 7)** - lists current employees where **Type** is **7**

The default **Display** setting depends on where you click the **Select Employees** button from.

## Search by

This feature allows you to search for an employee by the following criteria:

- <Blank> (this is the default option)
- Number
- Surname
- Forename
- NI Number

When selecting an option, the **For** field enables. From here, you can enter the data for who you are searching for; the employee grid will then populate with any employees found to be matching the search criteria.

**Note:** The **Search By** and **For** fields will search based on the **Display** option selected. For example: if **All Leavers** is selected from the **Display** dropdown and **Surname** from **Search By**, the system will search for any leavers whose surname contains a match with the entry in the **For** field.

## Reset

Clicking the **Reset** button restores the **Display** and **Search for** fields to the default settings and removes any text from the **For** field. This function also deselects any employees where the **Select** indicator is set in the employee grid.

## Employee Grid

The Employee Grid contains the following information:

- Number
- Surname
- Forename
- NI Number
- Select (contains an indicator that can be set or unset to specify if you want the employee included in the action you are selecting employees for)

Clicking on one of the column headings (except for **Select**) will sort the data in that order, either ascending or descending.



## Select

The **Select** column allows you to select/deselect employees, depending on whether you want them included in the action you are selecting employees for. The default setting for **Select** is conditional and is based on the area of the software you are accessing.

For instance, if you are selecting employees for **Payroll Calculation**, all employees will be selected by default. Whereas if you were selecting **Change Employee Details**, no employees would select by default as it is only possible to select on an individual basis for this function.

## Employee Details

The areas where you will see the new **Select Employees** button include:

- **Employee Details**
- **Note an Employee a Leaver**
- **Payroll Calculations**
- **Reports**

## Program Options

To allow you to specify if you want reports to list employees in Employee Number or Name order, under **Setup/ Options | 1 – Program Options**, in the **Design of Printed Output** frame, we have added the following new options:

- List employees on reports in 'Number' order (this is the default setting)
- List employees on reports in 'Name' order

## Now Pensions 1.3

When creating the NOW Pension v1.3 output file, if an employee has opted in, the ENROL DATE (Column M) and OPTIN (Column AA) will both be populated with the opt-in date.

## GP Payroll Summer 2021 Release 21.300

## MyePayWindow Module

IRIS is moving from the IRIS OpenPayslips facility to integration with the myePayWindow payroll self-services portal. Users must migrate over to myePayWindow by 31<sup>st</sup> August 2021, following which the payroll will automatically make the switch for any remaining users.

MyePayWindow is a secure document exchange platform that delivers payroll information to employers and employees, such as payslips, P60s, P45s and Pension letters, each payroll period. Employers and employees can view the published documents, in a secure online portal, using their own separate login details.

**Note:** Once you have switched to myePayWindow, this cannot be undone.

To facilitate this change, the following fields are added/removed or renamed once **myePayWindow Login Details** have been entered into the payroll software:

## Setup/ Options

Under **Setup/ Options | 2 – Passwords**, in the **Online Login Details** section we have added a new **Use myePayWindow** indicator. Once the initial link with myePayWindow has been initialised, this menu option will no longer be visible, otherwise it will be visible and can be deselected.

**Please Note:** When the **Use myePayWindow** indicator has been selected, the **Online Login Details** text will change to **myePayWindow Details**.

The following new buttons will also be visible under the **myePayWindow Details** section when the **Use myePayWindow** indicator is selected:

- **myePayWindow Error Log** button
- **myePayWindow Website Login** button
- **Save Details** button

For any new Practices, **Use myePayWindow** will be selected by default.

## Registration

On the initial attempt to publish, you will be asked for the registration login credentials. Enter your **Username** and **Password** and, if they are accepted, the system will then proceed to send the data to myePayWindow and a progress bar will be displayed. Once the selected report has been published successfully, a confirmation message will be displayed. If errors are identified, a message will confirm this where you can click **Yes** to view the errors.

**Please Note:** you are unable to perform any other function in payroll until the progress screen has finished.

## myePayWindows Errors Screen

The **myePayWindows Errors** screen will open when you click **Yes** from the errors have been identified message. Alternatively, from **Setup/ Options | 2 – Passwords**, on the **myePayWindow Details** frame, click the **myePayWindow Error Log** button.

The screen will show the **Error Source** and **Error Description**.

**Error Source** will show:

- Practice Name if it is an employer level error

- Employee Number and Name if it is an employee level error

The **Error Description** will show the error returned from myePayWindow. Once the error has been resolved, you can republish.

## OpenPayslips

References to OpenPayslips throughout the software have been changed to myePayWindow.

## Transfer to GP Accounts

Following the increase of the employee limit to 999 in GP Payroll, we have removed the restriction of 255 employees when creating the file for import to GP Accounts.

## Release Version Numbers

To standardise and align our products to make it clearer for support and users alike, we have changed the way we issue the release numbers for our desktop payroll products.

For example:

21.60 (21 = tax year, 6 = Tax month, 0 = patch)

21.61 (21 = tax year, 6 = Tax month, 1 = patch)

21.111 (21 = tax year, 11 = Tax month, 1 = patch)

## Example

Planned Release	Tax Calendar Month	Patch 1	Patch 2
September 2021	21.60	21.61	21.62
October 2021	21.70	21.71	21.72
November 2021	21.80	21.81	21.82
December 2021	21.90	21.91	21.92
January 2022	21.100	21.101	21.102
February 2022	21.110	21.111	21.112
March 2022	21.120	21.121	21.122
April 2022	22.10	22.11	22.12
May 2022	22.20	22.21	22.22
June 2022	22.30	22.31	22.32
July 2022	22.40	22.41	22.42
August 2022	22.50	22.51	22.52

## GP Payroll April 2021 Patch Release 2021.102

### Furlough Extension

The software/spreadsheet has been updated to incorporate the extension of the CJRS until 30<sup>th</sup> September 2021.

Please see the **COVID-19 – Furlough Job Retention Scheme Changes and Important Dates Guide** for further information.

## GP Payroll April 2021 Patch Release 2021.1.\*

### Default Student Loan

Previously, when a new employee had more than one student loan selected in the Starter Checklist, the software assigned the lowest number by plan type. We have updated the software and it will now assign the number based on the lowest annual threshold of the selected loans.

### Calculating Average Earnings for SMP

The issue with calculating average earnings for SMP, where no output was being produced, has been resolved.

### NEST CS File

An issue which occurred in unusual circumstances, where changing the Group, Date Group Changed, Payment Source and Date Payment Source Changed, resulting in the NEST CS file displaying zero values has been fixed.

### Full Payment Submission (FPS)

An issue where messages were being displayed stating an FPS had already been submitted has been resolved.

# GP Payroll April 2021 Release 2021.1

## PAYE Legislation

### Student Loan Thresholds

The annual thresholds have been updated in line with legislation for 2021/2022.

- Plan Type 1 increased from £19,390 to £19,895
- Plan Type 2 increased from £26,575 to £27,295
- Plan Type 4 is new for April 2021 and has a threshold of £25,000
- Postgraduate Student Loans remains at £21,000

### Tax Code Changes

In line with legislative changes, moving into the new tax year (2021/2022) will automatically uplift tax codes, if required.

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

The rates for tax, NI and statutory payments have been updated for 2021/2022.

### Minimum Wage

Minimum wages rates have been updated in line with legislation for 2021/2022.

### AE Parameters

The AE Parameters have been updated in line with legislation for 2021/2022.

### P60s

We have updated the P60s for year-end 2020/2021 and to include Statutory Parental Bereavement Pay (SPBP).

## Updates to NMW/NLW for 2021/22

### System Parameters

HMRC have revised the **National Minimum Wage (NMW)** and the **National Living Wage (NLW)** age brackets and rates for the tax year 2021/2022. Following these changes, we have updated the software to perform checks using the new parameters. The table below details the NMW/NLW ages and rates for April 2020, and the amended figures for April 2021.

National Minimum & Living Wage – Age	Rate from April 20	National Minimum & Living Wage – Age	Rate from April 21
25 and over	£8.72	23 and over	£8.91
21–24	£8.20	21–22	£8.36
18–20	£6.45	18–20	£6.56
16–17	£4.55	16–17	£4.62
Apprentice Rate	£4.15	Apprentice Rate	£4.30

**Note:** The system does not make automatic rate changes for employees. It only checks the rates and ages are the correct parameters for the tax year. It is your responsibility to change them. Before updating the software, if you have entered your own rates on the **Setup/ Options | 12 – Tax/NI Parameters | National Minimum And Living Wage Rates | Add New Rates** screen with a date later than 1 April 2021, the system will not overwrite these figures, you will need to change them manually.

### Reports

We have updated all reports in line with the new NMW and NLW parameters.

### Starter Checklist

#### New Starter Checklist

On **Employee Details | Starter Details**, when selecting either **New Starter or Expat**, we have added a **Student Loan/Postgraduate Loan** button and screen. This update follows the introduction of **Student Loan Plan Type 04** and is in line with updates made by HMRC to the Starter Checklist. The addition of the **Student Loan/Postgraduate Loan** button allows you to assign the correct student loan plan(s) for your employees. The button automatically enables when selecting either the **New Starter** or **Expat Details** screen.

After choosing **Student Loan/Postgraduate Loan**, a new screen will display. Any changes made to the **Student Loan/Postgraduate Loan Details** screen in **Starter Details** will be reflected in the **Employee Details | Student Loan/Postgraduate Loan** screen, including setting the **Student Loan Indicator** and **Plan Type**. However, changes made in **Employee Details | Student Loan/Postgraduate Student Loan Details** screen will not update the same fields in **Starter Details**. This is to ensure that the options you have entered in the **Starter Details** screen remain and match the Starter Checklist completed by the employee.

**Note:** the new **Student Loan/Postgraduate Loan** button/screen will be visible immediately after updating the software. However, **Plan Type 04** will only display for tax year 2021/2022 onwards.

## Starting Declaration

We have updated Statements **A**, **B** and **C** in line with HMRC requirements. The new statements are as follows:

- **Statement A:** “Do not choose this statement if you’re in receipt of a State, Works or Private Pension. Choose this statement if the following applies. This is my first job since 6 April and since the 6 April I’ve not received payments from any of the following:
  - Jobseeker’s Allowance
  - Employment and Support Allowance
  - Incapacity Benefit”
- **Statement B:** “Do not choose this statement if you’re in receipt of a State, Works or Private Pension. Choose this statement if the following applies. Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following:
  - Jobseeker’s Allowance
  - Employment and Support Allowance
  - Incapacity Benefit”
- **Statement C:** “Choose this statement if:
  - you have another job and/or
  - you’re in receipt of a State, Works or Private Pension”

Following these changes, we have renamed the following fields:

- The **Starter Checklist not completed** tick box is now **Starter Checklist is not completed by this employee**
- In the **Starter Details Wizard | New Starter** screen, **Employee Status** is now **Transfer from Another Payroll System**
- The **Previous Employee Code** label is now **Previous Employee Code/RTI Pay ID**



## New Student Loan Plan Type 04 Scotland

### Employee Details Student Loan Plan Type

Following the introduction of **Student Loan Plan Type 04 Scotland** which has a threshold of £25,000 and a 9% deduction rate for tax year 2021/2022 onwards, on **Employee Details | Student Loan/Postgraduate Loan**, we have replaced the **Plan Type** drop-down and added a **Select the Plan Type(s)** label, with the following new tick boxes:

- a. **Plan 1**
- b. **Plan 2**
- c. **Plan 4**

Setting the **Student Loan** drop-down to **No** will disable the **Plan Type** fields, by default. Selecting **Yes** will enable the fields. The software uses the Plan with the lowest numerical figure to calculate the payroll when you choose more than one plan type. For example, if ticking **Plans 2** and **4**, the system will use **Plan 2** for the calculation.

### Import/Export

We have added **Student Loan Plan Type 04** to the **Import/ Export** fields.

### Tax/NI Parameters

On **Setup/ Options | 12 - Tax/NI Parameters | Student Loan/Postgraduate Student Loan Rates and Thresholds**, under **Student Loan Thresholds and Rates**, we have added a new row labelled, **Student Loan Plan Type 4**. New fields for **Annual Threshold** and **Repayment Rate** have also been added.

### Government Rates and Parameters Summary

On the Government Rates and Parameters Summary, we have added the following rows to the **Student Loan** section of the report:

- **Student Loan Plan Type 4:**
  - **Annual Threshold**
  - **Repayment Percentage**

## Payroll Calculations

Although the threshold differs when calculating **Student Loan Plan Type 4**, there is no change to the rate or method when calculating student loan deduction.

### Example

#### Plan Type 4 (using 2021/2022 monthly thresholds)

Student Loan Plan Type	4
Nlable Pay	2,500
Annual Threshold	25,000
Monthly Threshold	2083.33
Deduction Rate	9%
Student Loan Deduction	$2,500 - 2,083.33 * 9\% = \text{£}37$ (rounded down to nearest £)

### RTI

RTI submissions have been updated to include all **Student Loan Plan** types. The **FPS Student Loan Year to-date** value will be a combination of **Plan Type 01, 02** and **04** deductions where all, or either, have existed in the current year.

## Statutory Payments

### Statutory Maternity Pay

When navigating to the **Payroll Calculations | Statutory | Allocate Statutory Maternity Pay (SMP) | Setup | Step 1(a) - The Average Salary for SMP** screen, completing the required fields and selecting **Next**, you will now see a warning message if the software detects that your employee does not qualify for SMP.

**Note:** the warning message is for your information only, you can choose to ignore the message and proceed with paying your employee **SMP** regardless of whether they qualify if you have reason to do so.

## Statutory Paternity Pay

On the **Payroll Calculations | Statutory | Allocate Statutory Paternity Pay (SPP) | Step 2 – Average Salary for SSP** screen, we have added a **Select the SPP type** label with two tick boxes, one for **Birth** and the other for **Adoption**. Based on your selection, the software decides whether the employee is eligible for **SPP**. A warning message will display if the employee does not qualify.

The text in the **Wizard for Statutory Paternity Pay, Step 2 – Average Salary for SSP** screen has been updated to:

“In order to calculate SPP, the employee's average monthly salary is required. In this screen, when you enter the date the baby is due the system can calculate the average MONTHLY salary which is used to calculate the average WEEKLY salary used in the SPP calculation.

If no pay details are detected in the relevant months (for example if you have only recently started to use IRIS GP Payroll) or if you have used the Re-arrange Employee Order facility in the software recently then you will need to calculate the average earnings figure manually. Visit [www.gov.uk/government/collections/statutory-pay](http://www.gov.uk/government/collections/statutory-pay) for further guidance with this.

Select the type of SPP you are paying (birth or adoption) - this information is used when the system performs a check to ensure the employee has worked for the practice long enough to qualify for the payment. This check only serves as guidance for you - if you have good reason to ignore the start date warning you can do so and continue processing SPP.”

## Statutory Adoption Pay

When navigating to **Payroll Calculations | Statutory | Allocate Statutory Adoption Pay (SAP) | Setup**, clicking **Next** on **Step 2 – Design of SAP period** and **Step 2(a) – The Average Salary for SAP** screens, the software performs a check to identify whether your employee meets the SAP criteria. You will see a warning message if your employee does not qualify.

## Statutory Parental Bereavement Pay

From **Payroll Calculations | Statutory | Allocate Statutory Parental Bereavement Pay (SPBP) | Setup**, and selecting **Next** on the **Wizard for Statutory Parental Bereavement Pay | Step 2 – The Average Salary for SPBP** screen, you will now see a warning message if your employee does not qualify for **SPBP**. This new feature allows for the software to cross-reference an employee's employment start date with the **SPBP** eligibility criteria, which in turn, speeds up the payroll process.

## SPPA i-Connect

### Employee Details

The SPPA has introduced a new reporting policy which aims to replace NSR forms and allow users to upload their monthly reports via **i-Connect** first, then submit them. Following this, we have updated the software to enable you to create and send CSV files. **Note:** These changes only affect Scottish practices.

**Please Note:** SPPA originally planned to launch the i-Connect function in April 2021. This has now been delayed, so until you are advised otherwise by SPPA, you should continue reporting to SPPA using NSR files and not use the new i-Connect options in GP Payroll

On **Employee | Pension Details | Type of Employment**, we have added the following option to the drop-down, **a. 15 – Optants member of an alternative superannuation scheme**).

We have also changed the labelling of the existing **Type of Employment** options to the following:

- a. 01 – Officer (not medical/dental)
- b. 02 – Officer (manual, not medical/dental)
- c. 03 – Mental Health Officer (not medical/dental)
- d. 04 – Mental Health Officer (female nurse, physiotherapist)
- e. 05 – Mental Health Officer (manual, not medical/dental)
- f. 06 – Female nurse, physiotherapist, midwife, health visitor
- g. 07 – Hospital Medical/Dental Officer, Trainee Medical Practitioner
- h. 08 – Mental Health Officer (medical/dental)
- i. 09 – General Medical Practitioner, Assistant General Practitioner
- j. 10 – General Dental Practitioner, Assistant General Dental Practitioner
- k. 11 – Maximum Part Time Consultant (10 sessions)
- l. 12 – Mental Health Officer (maximum part time consultant, 10 sessions)
- m. 13 – Part Time Consultant (up to 9 sessions)
- n. 14 – Mental Health Officer (part time consultant, up to 9 sessions)
- o. 16 – Medical Assistant Practitioners
- p. 17 – Dental Assistance Practitioners

### Pension Summaries Screen

To enable you to create an i-Connect data file, under the **Print Output | Pension Summaries | NHS Pension Summaries** frame, we have added a **Monthly i-Connect data file** field. **Note:** This new field only applies when your **Pension Agency** is set to Scotland.

## SPPA i-Connect Options Screen

Upon selecting **Print Output | Pension Summaries | Monthly i-Connect**, a new **SPPA I-Connect** options screen will display asking you whether you want to create the CSV file or print a report. Other features on this screen include:

- **Select an option** frame with the following:
  - **Summary of Contributions Received** field
  - **Select the month that you want to create the file or print the report for** drop-down) this field lists months April – March
  - **Prepare a file in CSV format for upload to i-Connect**
  - **Print a copy of the form for your records** field
- **Number of Employees** frame with the following fields:
  - **All employees**
  - **Choose employees**

## SPPA Wizard Launch Screen

When navigating to the **SPPA I-Connect** options screen and selecting the **Prepare a file in CSV format for upload to i-Connect** field, a **Wizard to create monthly data file for upload to i-Connect** screen will launch after you click **Ok**.

## Select Leavers Screen

To pick employees who have left the pension scheme/employment, click through to the **SPPA Wizard for i-Connect** screen, choose **Next** and a new **Select Leavers** screen will display. The screen contains a grid with three columns, including **Employee Name**, **Date of Leaving Scheme** and **Reason for Leaving**. The **Employee Name** and **Reason for Leaving** columns are drop-downs, allowing you to select the correct option. When selecting the **Reason for Leaving** column, you will see the following options:

- **01 – Opt Out – Personal Financial Reasons**
- **02 – Opt Out – Contribution Increases**
- **03 – Opt Out – Joined Another Scheme**
- **04 – Opt Out – Changes to the Scheme**
- **05 – Opt Out – Other**
- **06 – Non-Occupational Injury**
- **07 – Non-Occupational Illness**
- **08 – Occupational Injury**
- **09 – Occupational Illness**
- **15 – Dismissal**
- **16 – Redundancy Voluntary**
- **17 – Death in Service**
- **19 – Retirement – Age**
- **20 – Ill Health – Termination of Paid Sick Leave**

- 21 – Ineligibility Due to Age or Maximum Service
- 22 – New Employment with NHS Scotland
- 23 – New Employment with NHS out with Scotland
- 26 – Ill Health
- 27 – Other
- 28 – Tapered Protection End Date
- 29 – Maternity Pay (EPA) Change to Non-Superannuable Employment
- 30 – Authorised Unpaid Leave
- 31 – Arrears of Pay Prior to Current Financial Year
- 32 – Retainer Scheme Arrangement
- 34 – Voluntary Early Retirement + Actuarial Reduction
- 35 – Retirement – Efficiency of the Service
- 40 – Voluntary Resignation – Lateral Move
- 41 – Voluntary Resignation – Lack of Opportunities
- 42 – Voluntary Resignation – Other
- 43 – Voluntary Resignation – Promotion
- 44 – End of Fixed Term Contract
- 45 – Pregnancy
- 46 – Dismissal Capability
- 47 – Redundancy Compulsory
- 48 – Retirement Other

The **Select Leavers** screen also includes a tick box with an **Include leavers from previous periods in file** label.

### Position of File Screen

On the **SPPA Wizard | Select Leavers** screen, click **Next** to navigate through to the **Position of File for upload to i-Connect** screen. This new screen enables you to choose where to save the CSV file.

### Success Screen

The **Success Screen** is the final screen displayed in the SPPA Wizard when creating the i-Connect data file.

### Create CSV file

We have created a **CSV file** to match the format provided by i-Connect.

## Monthly Data Report

To allow you to input leaver information before printing the report, on **Print Output | Pension Summaries | Monthly i-Connect data file | Print a Copy of the form for your records**, we have added an **i-Connect monthly data report** screen. The screen contains a grid similar to the **Select Leavers** screen with **Employee Name, Date of Leaving Scheme** and **Reason for Leaving** columns. The **Employee Name** and **Reason for Leaving Scheme** drop-downs automatically populate for employees included in the NHS Pension Scheme and who have any of the following dates falling within the 1<sup>st</sup> – last calendar date of the chosen month:

- a. Leaving Date
- b. Opt Out Date
- c. Ceased Contributions Date

The **Date of Leaving Scheme** is a date-picker field. The monthly data report screen also features an **Include leavers from previous periods in report** tick box.

If choosing the **All Employees** option in the **SPPA i-Connect Options** screen, you will be able to select any employee who is set to **Include in NHS Pension Scheme**. Likewise, ticking the **Choose Employees** option allows you to select any of the employees you have highlighted.

## Year End Transfer

We have updated the software to allow i-Connect.CSV files created to be transferred and saved into the Payroll folder.

## RTI

### Send FPS for Previous Year

#### Earlier Year FPS Menu Item

It is now possible to send a Full Payment Submission (FPS) for a previous tax year and after 19th April in the current tax year. From 2020/2021 onwards, you can no longer send an Earlier Year Update (EYU) to correct any mistakes made in the previous tax year. To enable you to submit an Earlier Year FPS, on the **RTI Submissions** screen, we have added an **Earlier Year FPS** label and button.

**Note:** The **Send Earlier Year FPS** menu item will only be visible in the software from the 2020/2021 tax year and can only be used from 2021/2022 and subsequent tax years to correct data from the previous year.

#### Earlier Year Update

We have removed the EYU menu item from the tax year 2020/2021 onwards. You can only send an EYU for submissions up to Tax Year 2019/2020.

## Earlier Year FPS – Select Employee

When navigating to **RTI Submissions | Earlier Year FPS**, a new screen, **Earlier Year FPS – Select Employee** will display. There are three new frames within the screen, including:

- **Select Tax Year**
- **Select Employee**
- **Add Employee**

The **Select Tax Year** frame contains a drop-down with a list of tax years you can choose from to submit your **Earlier Year FPS**. The drop-down enables by default.

The **Select Employee** frame includes a drop-down which lists every employee on the system for the tax year selected, including leavers. The drop-down enables when you have chosen a tax year from the **Select Tax Year** option.

The final frame, **Add Employee** has a **New Employee** button. When clicked, an **Earlier Year FPS Employee Details** screen will display. This button enables when choosing a tax year from the **Select Tax Year** drop-down.

The purpose of this screen is to allow you to send an Earlier Year FPS where a company is new to GP Payroll and has no knowledge of employees that left whilst on another payroll.

## Sending an Earlier Year FPS for a New Starter

1. Go to **RTI Submissions | Earlier Year FPS | Earlier Year FPS – Select Employee**
2. Select **New Employee**
3. An **Earlier Year FPS Employee Details** screen will display
4. The screen contains a **Personal Details** frame with the following fields:
  - **FPS Pay ID** – you must enter the Pay ID used previously for this employee, if it is not known, enter a new, exclusive one and tick the **Pay ID Changed** box
  - **Pay ID Changed**
  - **NI Number**
  - **Date of Birth**
  - **Leaving Date**
  - **Sex**
  - **Pay Frequency**
  - **Pay Date**
  - **Surname**
  - **Forename**
  - **Other Name(s)**
  - **Private address**
  - **Postcode**
  - **Country**



5. Select **Next** to open the **Earlier Year FPS - Data Entry** screen. Enter and amend the data fields required for inclusion in the Earlier Year FPS
6. The screen contains a **Tax Details** frame with the following fields:

- **Tax Code**
- **W1/M1?**
- **Total Pay To-Date**
- **Total Tax Due To-Date**
- **Total Student Loan To-Date**
- **Total Postgraduate Loan To-Date**

The National Insurance Details frame includes:

- **NI Letter**
- **Pay for NIC To-date**
- **Total Employer's NI Contributions**
- **Total Employee NI Contributions**
- **Total Earnings at LEL**
- **Total Earnings above LEL to PT**
- **Total Earnings above PT to UEL**

The **Sundry Details** frame contains:

- **Gross Pension Deductions To-Date**
- **Net Pension Deductions To-Date**
- **Annual Pension Amount**

The Statutory Payment Details frame includes:

- **Total SMP To-Date**
- **Total SPP To-Date**
- **Total ShPP To-Date**
- **Total SAP To-Date**
- **Total SBP To-Date**

7. If required, from the **Earlier Year FPS - Data Entry** screen, select the **Multiple NICs** button and the **Earlier Year FPS - Multiple NI Rates** screen will display. Make the necessary amendments to the following fields:

- **NI Letter**
- **Total Earnings at LEL**
- **Total Earnings above UEL to PT**
- **Total Earnings above PT to UEL**
- **Total Employer's NIC**

- **Total Employee's NIC**
  - **Pay for NIC To-Date**
  - **Current NI Letter**
  - **Previous NI Letter**
  - **Oldest NI letter**
8. Click **Print** from the **Earlier Year FPS - Data Entry** screen if you require a hard copy of the information
  9. Then select **Next**
  10. The **Earlier Year FPS Confirmation Screen** allows you to see your Earlier Year FPS before submitting it to HMRC. **Note:** The National Insurance section will show up to four sets of data. If only one NI rate has been used in the year, only one set of data will display
  11. Again, click **Print** if you require a hard copy of the Earlier Year FPS report
  12. Choose **Send** to submit to HMRC

### Sending an Earlier Year FPS for an Existing Employee

1. Go to **RTI Submissions | Earlier Year FPS | Earlier Year FPS – Select Employee**
2. Click **Next**
3. An **Earlier Year FPS – Data Entry** screen will open
4. If required, from the **Earlier Year FPS - Data Entry** screen, select the **Multiple NICs** button and the **Earlier Year FPS – Multiple NI Rates** screen will display. Make the necessary amendments to the fields
5. Click **Print** from the **Earlier Year FPS - Data Entry** screen if you require a hard copy of the information
6. Then select **Next**
7. The **Earlier Year FPS Confirmation Screen** allows you to see your Earlier Year FPS before submitting it to HMRC. **Note:** The National Insurance section will show up to four sets of data. If only one NI rate has been used in the year, only one set of data will display
8. Again, click **Print** if you require a hard copy of the Earlier Year FPS report
9. Choose **Send** to submit to HMRC

### Pending

When navigating to **RTI Submission | Earlier Year FPS** and clicking **Next**, if you have either an outstanding Earlier Year FPS or a Normal FPS, the system will prompt you to complete the submission. **Note:** You will not be able to proceed with submitting the Earlier Year FPS until the pending FPS is completed or removed.

## Employer Payment Submission (EPS)

We have updated the **EPS** schema for submissions relating to tax year 2021/2022.

On the **Setup/ Options | 12 - Tax/NI Parameters | State Aid** screen, we have renamed the **Industrial** field to **Industrial/Other**.

## Full Payment Submission (FPS)

The **FPS** schema has been updated for tax year 2021/2022 in line with government legislation.

## Pensions

### NHS Pension Rates

The Pension Tiers for NHS England/Wales, Scotland and Northern Ireland are up to date with legislation for 2021/2022.

## Other Improvements

### Previous Employee Code Field

On **Employee | Starter Details** and **Import/Export**, we have increased the **Previous Employee Code** field length to 35 characters.

### Changes to Import/Export

#### New Fields for Import/Export

Under **Import/Export Data | Import Data** or **Export Data | Data Import Fields** or **Data Export Fields | Field Name** we have added a new field, **Total Employer NIC**.

#### Import/Export Smart Search

We have updated the **Field Name** functionality in the **Import** and **Export** options, allowing you to search for a field without scrolling down the list.

## Scottish Widows Contributions File Changes

The Scottish Widows Contributions file has been updated in line with their specification. The following fields have been added:

- **Employee pensionable salary for pay period**
- **Employee net regular contribution percentage**
- **Employer regular contribution percentage**

## 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	For IRIS Payroll Professional
Tel: 0344 815 5656	Tel: 0344 815 5676	Tel: 0345 057 3708
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk	Email: payrollsales@iris.co.uk

## Contact Support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS GP Payroll	0344 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5671	earniesupport@iris.co.uk
IRIS Payroll Professional (formerly Star)	01273 715300	payroll-support@iris.co.uk

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