# IRIS Payroll

Scottish Widows Pension

File creation

April 2020

IRIS. Look forward

# Contents

# Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Scottish Widows output file.  This file will inform Scottish Widows of workers to enrol and all of the contributions taken in the pay reference period.

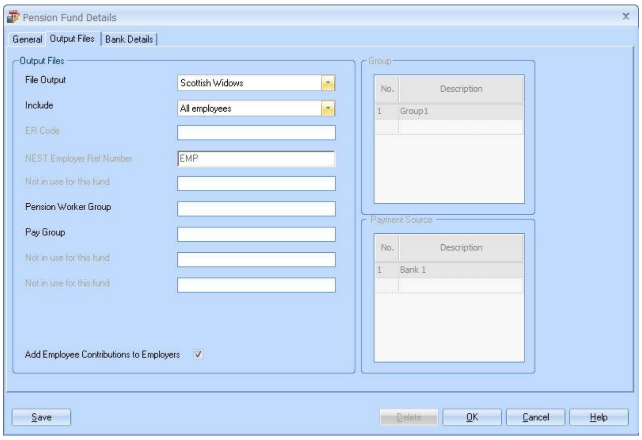
The guide covers:

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

# Scottish Widows configuration

Scottish Widows require you to supply a Pension Provider Worker Group and Pay Group for each employee in the output file.  Scottish Widows expect these to be consistent with the payroll upload workflow notification.  If you have more than one Pay Group, you should create an identifier and categorise each Pay Group. For further information, please contact Scottish Widows.

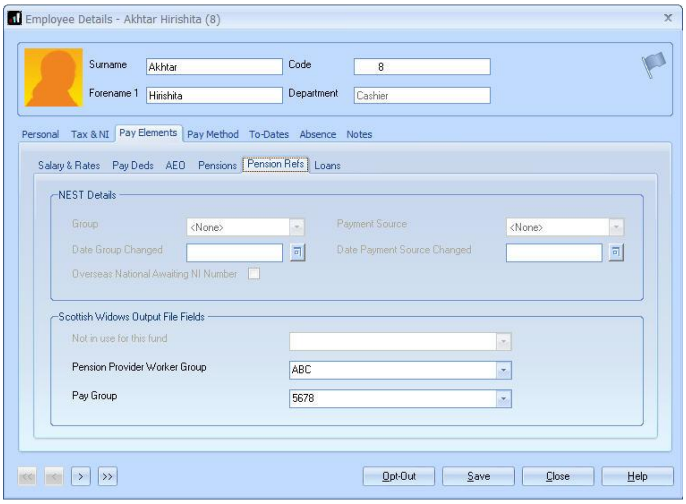
## Pension Fund configuration




1. From the **Pension** tab, click **Configure Pension Fund**
2. Select the Scottish Widows pension fund and click **Edit**
3. Choose the **Output Files** tab
4. In the **File Output** field, select **Scottish Widows**
5. In the **Include** field, select **All employees** (unless you have been told a different option by Scottish Widows)
6. Enter the **Pension Provider Worker Group** in the field
7. In the **Pay Group** field, enter the Pay Group you want to be applied to the employee's details when an employee is automatically enrolled
8. If you have Salary Sacrifice pension deductions, tick **Add Employee Contributions to Employers**
   If your pension deductions are not Salary Sacrifice, the **Add Employee Contributions to Employers** box is disabled
9. Click **OK**

## Employee Details configuration

If you have more than one Pay Group configured, then you will need to select the appropriate one for the employee in **Employee Details**.




1. On the left-hand Selection Bar, double-click on the appropriate employee to open their **Employee Details**
2. Select the **Pay Elements** tab and then **Pension Refs**
3. In the **Pension Provider Worker Group** field, enter the appropriate details for the employee (if different than the one configured in the Pension Fund)

   If the **Pension Provider Worker Group** doesn't contain the appropriate option, you can create a new one by typing directly in the field and clicking **Save**. The new **Pension Provider Worker Group** option will be available to select in the drop-down field
4. In the **Pay Group** field, select the appropriate details for the employee

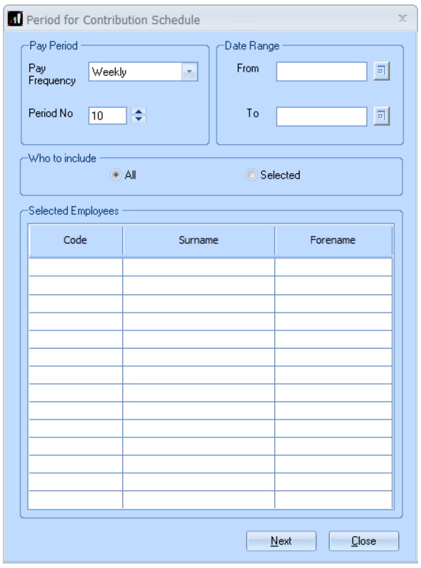
   If the **Pay Group** doesn't contain the appropriate option, you can create a new one by typing directly in the field and then clicking **Save**. The new **Pay Group** option will be available to select in the drop-down field
5. Click **Save** and then click **Close**

# Scottish Widows output file

The Scottish Widows output file contains information for new joiners and contributions taken. You should send an output file to Scottish Widows each period you have employees new to the pension scheme or had pension contributions taken.

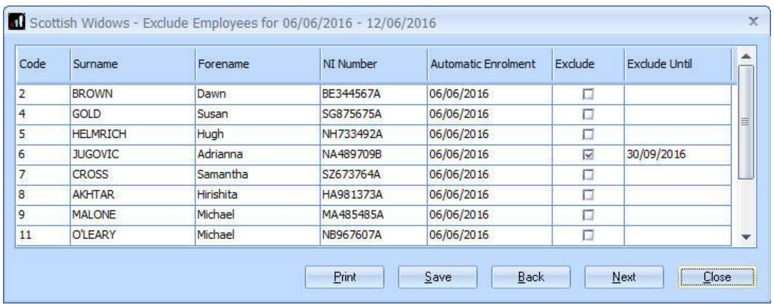
## Create Scottish Widows V3 output file

1. From the **Pension** tab, click **Create Pension File**
2. On the **Select file to create** screen, choose **Scottish Widows V3**
3. Click **Next**
4. On the **Period for Contribution Schedule** screen, choose the **Pay Frequency** and **Period No** you processed the payroll for and had employees enrolled or pension contributions taken
5. In the **Who to include** section, accept the default of **All**
6. Click **Next**




Your payroll can withhold contributions if the pension provider doesn't want to receive the funds until the end of the opt-out window. This is available when creating the pension output files.

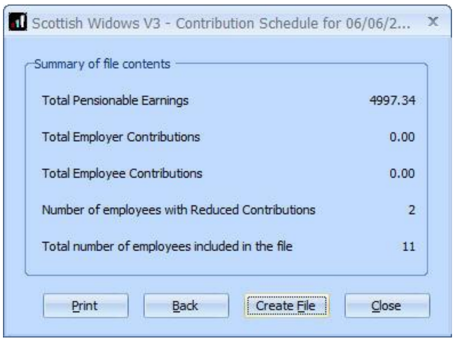
7. Tick the box in the **Exclude** column to remove the worker from the contributions file. This will withhold the worker's contributions until the date entered in the **Exclude Until** column




You must check with Scottish Widows if you are permitted this option

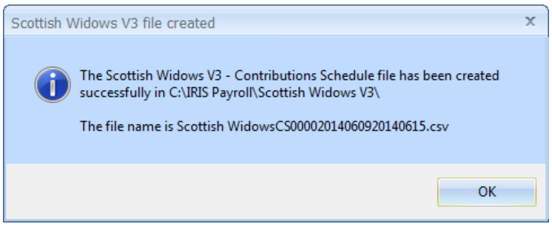
8. Click **Next**

9. On the **Scottish Widows V3...**screen, click **Print** to print a report of the employees that are included in the file



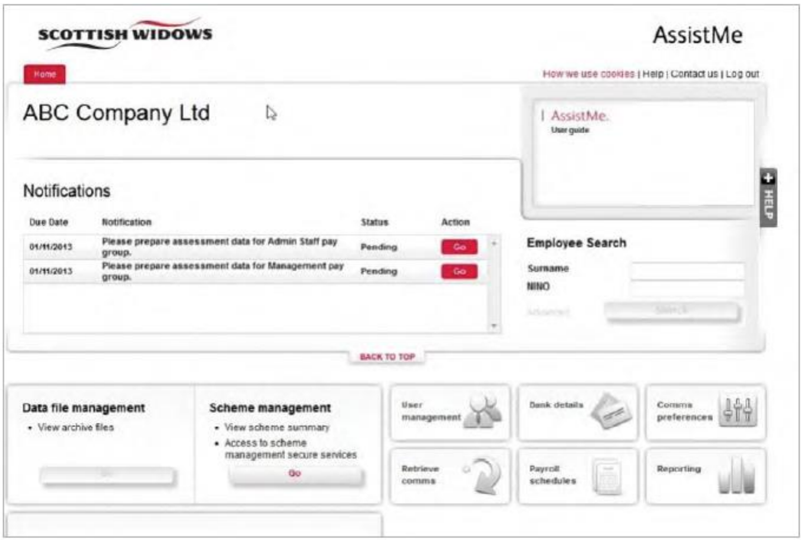

10. Click **Create File** to create the **Scottish Widows V3** file

11. A message will advise the location where the **Scottish Widows V3** file has been created



## Upload Scottish Widows V3 file

If you have chosen Scottish Widows to assess your employees and send the pension communications to them, you must ensure the **Configure Pension Fund Details** | **Output Files** | **Include** is set to **All employees**.




1. Log into AssistMe
2. On the main screen, in the **Notifications** section, next to the **Please upload full data for [pay group name] pay group**, click the **Go** button
3. Select **Process data file** and browse to the location in your payroll where the **Scottish Widows V3** output file was created and click **Upload**

For more information about uploading a **Scottish Widows V3** output file, please contact Scottish Widows.

## 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<br>Fax: 0844 366 7828<br>Email: helpdesk@ir-efile.gov.uk | Tel: 0300 200 3200<br>Tel: 0300 200 3211 (new business) |

### Contact Sales (including stationery sales)

| For IRIS Payrolls | For Earnie Payrolls |
|---|---|
| Tel: 0344 815 5700<br>Email: sales@iris.co.uk | Tel: 0344 815 5677<br>Email: earniesales@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 |