

IRIS Payroll

Standard Life Pension File
Creation

April 2020

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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:

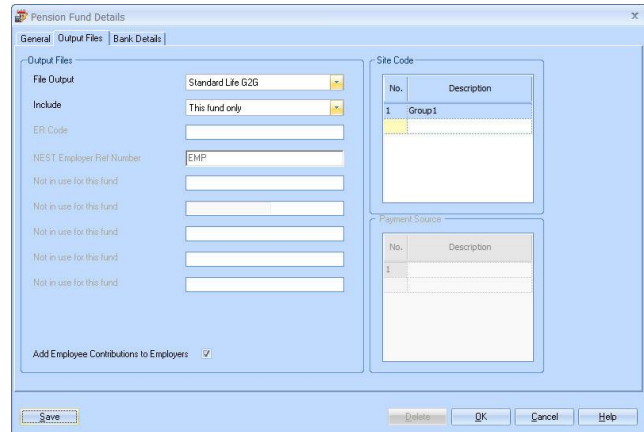
- Configuring output file information
- Creating an output file each period

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. From the **Pension** tab, click **Configure Pension Fund**
2. Select the Standard Life pension fund and click **Edit**
3. Select the **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' field is set to 'Standard Life G2G' and the 'Include' field is set to 'This fund only'. The 'Add Employee Contributions to Employers' checkbox is checked. There are two tables: 'Site Code' and 'Payment Source'. The 'Site Code' table has one row with '1' in the 'No.' column and 'Group1' in the 'Description' column. The 'Payment Source' table has one row with '1' in the 'No.' column and an empty 'Description' column.

No.	Description
1	Group1

No.	Description
1	

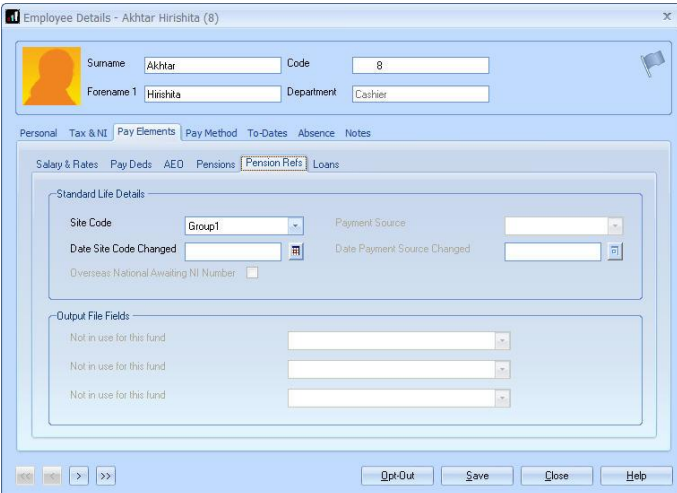
If your pension deductions are not Salary Sacrifice, the **Add Employee Contributions to Employers** box is disabled

8. Click **OK**

Employee Details configuration

If you have multiple pay frequencies, then you will need to select the appropriate **Site Code** 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 **Site Code** drop-down field, select the appropriate details for the employee
4. Click **Save** and then **Close**



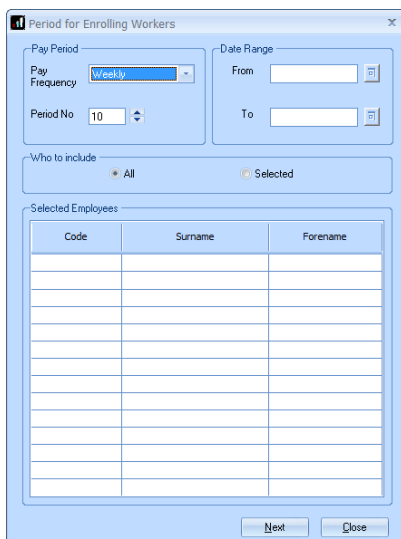
The screenshot shows the 'Employee Details - Akhtar Hirishita (8)' window. The 'Pension Refs' tab is active, displaying the 'Standard Life Details' section. The 'Site Code' is set to 'Group1'. Below this, there are three 'Output File Fields', each with a dropdown menu and the text 'Not in use for this fund'. The window also has a 'Personal' tab and a 'Pay Elements' tab. The 'Pay Elements' tab is selected, and the 'Pension Refs' sub-tab is active. The 'Save' and 'Close' buttons are visible at the bottom right.

Standard Life G2G – Joiners file

You should send a Joiners file to Standard Life if you have any employees automatically enrolled or opted in the pay period.

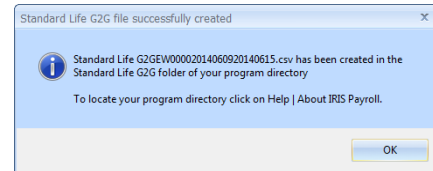
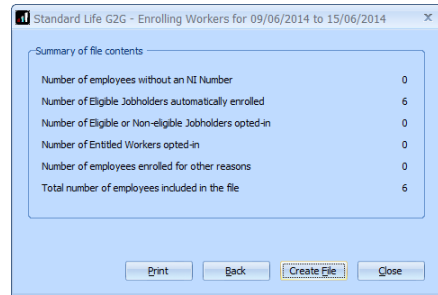
Create Standard Life G2G Joiners file

1. From the **Pension** menu, select **Create Pension File**
2. On the **Select file to create** screen, choose **Standard Life G2G Joiners**
3. Click **Next**
4. On the **Period for Enrolling Workers** 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**



The screenshot shows the 'Period for Enrolling Workers' window. The 'Pay Period' is set to 'Weekly'. The 'Date Range' is set to 'From' and 'To'. The 'Period No' is set to '10'. The 'Who to include' section is set to 'All'. Below this is a table for 'Selected Employees' with columns for 'Code', 'Surname', and 'Forename'. The table is currently empty. The 'Next' and 'Close' buttons are visible at the bottom right.

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

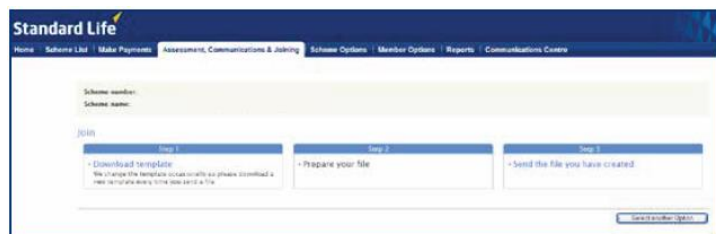


Upload Standard Life G2G Joiners file

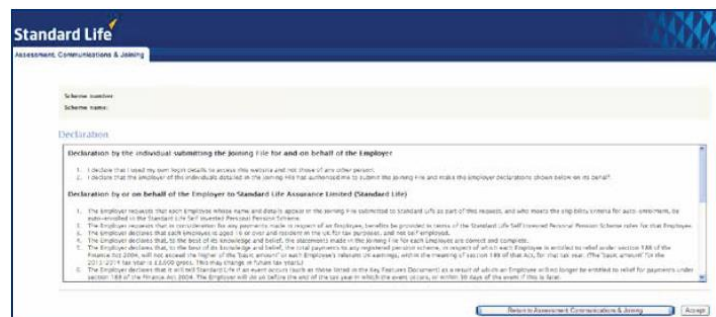
1. Log into your GPZ
2. On the **Home** page, select the **Assessment, communications and joining**
3. On the **Assessment, communications and joining** page, select the option **Assessment, communications and joining**
4. On the **Options** page, select **Join**



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**



Click [here](#) for more information about uploading a file to Standard Life.

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

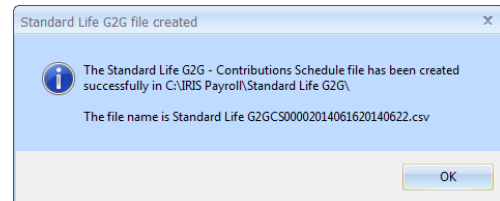
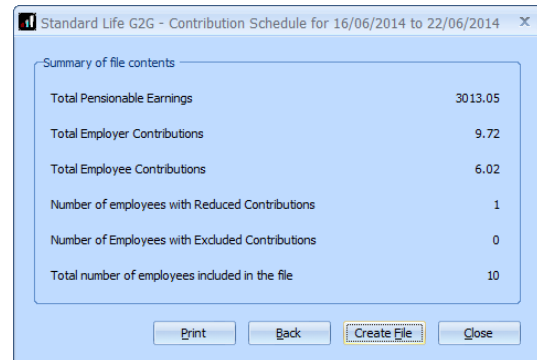
1. From the **Pension** menu, select **Create Pension File**
2. On the **Select file to create** screen, choose **Standard Life G2G Payments**
3. Click **Next**
4. On the **Period for Contribution Schedule** screen, choose the **Pay Frequency** and **Pay Period** you processed the payroll for and want to create the Standard Life file
5. In the **Who to include** section, accept the default of **All**
6. Click **Next**

Your payroll can withhold 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 remove an employee from the file. This will withhold 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.

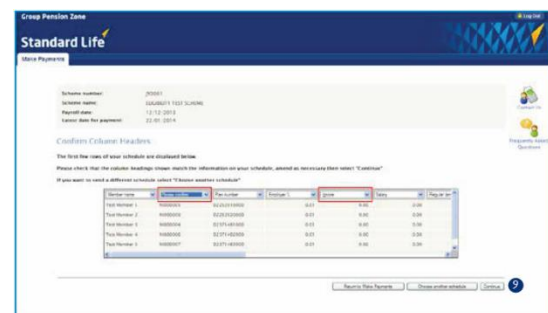
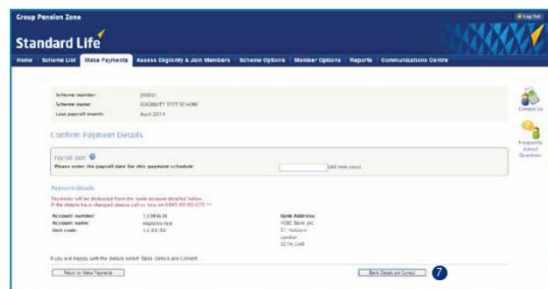
10. Click **Next**
- You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option

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



Upload Standard Life G2G Payments file

1. Log into 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 then click **Continue**



Click **here** for more information about uploading a file to Standard Life.

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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