



# IRIS Payroll

## Release Notes

01/09/2015



## Dear Customer,

Welcome to your software update for Tax Year 2015/2016. 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](http://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 2015 Release Notes V2.14.\*

### COMING SOON

#### NEST Integration

A process has been implemented for future use, enabling you to send pension files directly to NEST without the need to create a CSV file and upload it separately. NEST have indicated that they intend to make the service available from winter 2015, but this may be subject to change.

We have added the ability to configure settings for sending files together with warnings for incomplete submissions however you will should not configure this until NEST have confirmed their system is live.

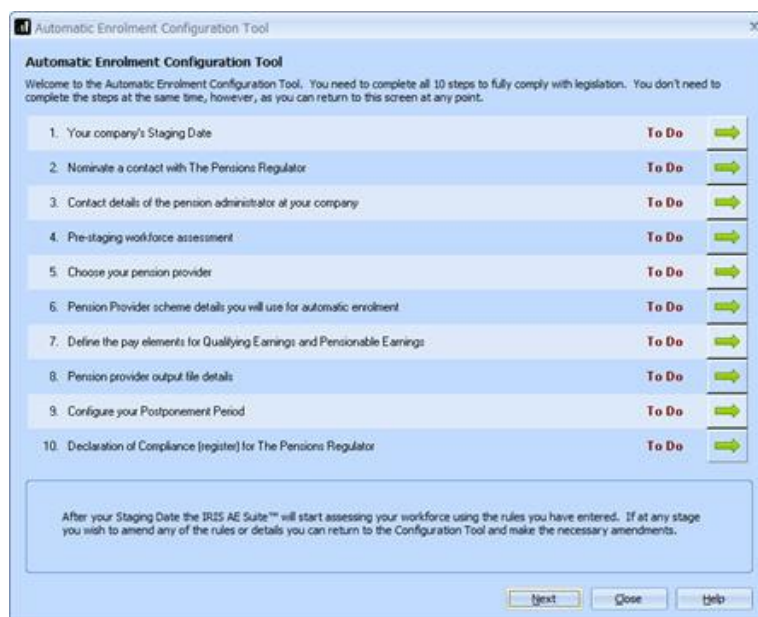
### WHAT'S NEW

#### Pensions

##### Auto Enrolment Configuration Tool

A new feature **Auto Enrol Config Tool** has been added to the product to make setting up your Auto Enrolment Scheme and settings more straightforward. If you have purchased the IRIS AE Suite™, after your Staging Date, the system will start assessing your workforce based on the data entered in the AE Configuration Tool. You can amend the details from the Automatic Enrolment Configuration Tool at any time.

The new '**Auto Enrol Config Tool**' has been added to the **Pension | Configuration** group. Selecting **Auto Enrol Config Tool** will launch the **Automatic Enrolment Configuration Tool Welcome screen**.



## How to use the Automatic Enrolment Configuration Tool

The **Auto Enrol Config Tool** gives you the opportunity to add/edit information at your convenience, you are not required to complete all steps in one go. To remind you a step has not been completed **'To do'** will be displayed in red next to that step. Some of the fields on the screens will already be populated if you have completed information via **Pension | Configure Auto Enrolment** and marked as **Complete**. When using the **Auto Enrol Config Tool** if you click **Previous**, **Next** or **Close**, changes will be automatically saved.

Some of the steps, once done, need you to click **Mark as Complete** in order for them to be finalised such as:

- Step 2 – Nominate a Contact with The Pensions Regulator
- Step 7 – Qualifying Earnings & Pensionable Earnings
- Step 9 – Postponement Period
- Step 10 – Declaration of Compliance

### 1. Your company's Staging date

This link takes you to the **Step 1 – Staging Date** screen, enter here your **Staging Date**, this is key to when Automatic Enrolment Duties apply to you.

### 2. Nominate a Contact with The Pensions Regulator

This link takes you to the **Step 2 – Nominate a Contact** screen. The Pensions Regulator requires a nominated contact for automatic enrolment for your company.

### 3. Contact details of the pension administrator at your company

This link takes you to the **Step 3 – Company Pension Scheme Administrator Details** screen. Enter here your contact who will be communicating with your pension provider, enrolling workers and processing opt-in / opt-out requests. These contact details will also be included in communications generated to employees via IRIS Open Enrol, part of the IRIS AE Suite™.

### 4. Approximate assessment of your workforce

This link takes you to the **Step 4 – Pre-staging Workforce Assessment** screen. From this screen you have opportunity to run a workforce assessment, prior to staging, to give an estimate of how many employees are likely to be automatically enrolled into a pension scheme at your staging date.

## 5. Choose your pension provider

This link takes you to the **Step 5 – Pension Scheme Providers** screen. From the drop-down menu select your pension provider. This field contains the ones we currently work with. The links on this screen give more information about the pension scheme providers.

## 6. Pension Provider scheme details you will use for automatic enrolment

This link takes you to the **Step 6 – Pension Provider Details** screen. Your pension provider can supply you with your pension scheme details. It is essential that this information is set up correctly as it will be used to calculate pension contributions and publish pension communications.

## 7. Define the pay elements for Qualifying Earnings and Pensionable Earnings

This link takes you to **Step 7 – Qualifying Earnings and Pensionable Earnings**. From this screen you can select pay elements that are included in Qualifying Earnings and Pensionable Earnings. A list of pay elements that are always included in Qualifying Earnings is shown here. If required, Pensionable Earnings are defined by your pension provider who can advise you what is classed as Pensionable Earnings for their scheme.

## 8. Pension Provider's output file details to upload to their website

This link takes you to **Step 8 – Pension Provider Output File Details**. This screen allows you to choose your output file format to be used when creating the output file for your pension provider. The **Include** option is generally set to **All Employees** in the pension scheme however this can be changed should your pension provider require different employees to be submitted in the output file.

## 9. Configure your Postponement Period

This link takes you to **Step 9 – Postponement Period**. This screen allows you to set up postponement periods for:

- **Staging Date/New Starters**

At Staging Date/employee's Start Date, all employees can be postponed for up to three months irrespective of their Worker Status

- **Eligible Jobholders**

A Postponement Period can apply to an employee on the date they become an eligible jobholder



## 10. Declaration of Compliance (register) for The Pensions Regulator

This link takes you to **Step 10 – Declaration of Compliance**. The Declaration of Compliance is a legal requirement from The Pensions Regulator. If you do not provide the information required, you could be subject to enforcement action and receive a fine. From this screen, click **Gather payroll information** button to produce a report detailing most of the information required for the Declaration of Compliance. Click **Complete Declaration of Compliance (registration)** to enter the necessary information.

**Please Note:** The Declaration of Compliance can only be completed a month after your Staging Date, and must be completed within 5 months of your Staging Date.

### Declaration of Compliance Report

Under Pension regulations, to comply with your duties, you are required to complete a **Declaration of Compliance**, within 5 months of your staging date, or you could be fined. We have therefore added a **Declaration of Compliance** report to assist you when completing the required information. This report can be either printed from the **Auto Enrol Config Tool or Pension | Print Pension Reports | Declaration of Compliance** (the report will need to be initially selected from **Reports | Report Manager | Pensions**). Prior to submitting the declaration, we recommend you carry out checks to ensure the data is accurate as information may have changed since your Staging Date.

**Please Note:** If you have more than one PAYE reference within a group of companies, you must combine the data, for all companies, when completing the Declaration of Compliance on The Pensions Regulator website.

### Postponement

On the **Pension | Configure Automatic Enrolment | Pensions** screen, a new section, **Postponement Periods**, together with an additional postponement period option has been added. This allows you to apply postponement for the following:

- Staging Date/New Starter
- A worker becomes an Eligible Jobholder

If you already have postponement criteria set, this will be reflected automatically under the new postponement period option and your postponement will continue.

If postponement has not been set up prior to installing this release, both **Postponement Periods** will be set to **No Postponement** by default.

**Please Note:** A Staging Date must be entered prior to setting up postponement.

## Staging Date/New Starter Postponement

For new starters, where the following criteria apply the **Staging Date/New Starter Postponement Period** will be applied from the actual start date, not the start of the current pay reference period:

- Company's Staging Date is before the employee start date
- Employee's start date is in the pay reference period prior to the current pay reference period

## Employee NI Saving – Salary Sacrifice Pension

Under **Company | Payments & Deductions | Configure Pensions | Add New** or **Edit**, a Payment/Deduction Type '**Employer's NI Saving**' has been added. This is to cater for pension deductions set up as a salary sacrifice, resulting in an employer NI saving, where an Employer has the opportunity to add either all or a percentage of the saving to the pension contribution.

The calculation will be based on the before tax and NI pension contribution multiplied by **the Employer NI Saving %**.

**Please Note:** Although it is possible to apply the new deduction to any pension fund or employee, the calculation for the Employer NI Saving deduction will only work alongside a Salary Sacrifice deduction and where the method of calculation is set to percentage.

If you have assigned the Employer NI Saving deduction to your default Auto Enrolment Fund this will assign it to any employees who are auto enrolled from then on. If you have employees who are already auto enrolled, you will need to manually assign the Employer's NI Saving deduction in Employee Details.

## NEST Pension Formats

In line with changes by NEST further characters can now be entered in selected fields such as:

- **Configure Auto Enrolment | NEST/Standard Life | Group** or **Payment Source** name
- **NEST Pension Output Files**
- **NEST Enrolling Workers**
- **NEST Contribution Schedule**

## Pension Output Files

### Configure Automatic Enrolment – Output Files tab

A new **Output Files** tab has been added to the **Configure Auto Enrolment** screen. This currently contains two options:

**Withhold Initial Pension Contributions** – Tick this option to ensure the **Exclude Employees** screen is displayed when creating a pension file. If you never withhold contributions, un-tick this option and the screen will no longer display.

The update will cause this option to be ticked by default, to ensure no processes change unexpectedly for you. If you would like to stop seeing the **Exclude Employees** screen when creating pension files, un-tick the option

**Send Pension Files – NEST** – This option is part of the NEST integration to come in a future release.

A further Pension provider, Royal London, formerly Scottish Life, has been added to **Pension | Create Pension File | Select file to create**. There are three output files for Royal London:

- Royal London Joiners
- Royal London Payments
- Royal London Leavers

Royal London has also been added to **Pension | Configure Pension Fund | Add New/Edit | Output Files | File Output**.

### Royal London Leavers

The **Leavers** screen allows you to select the date range or period to create the Royal London Leavers file for. From the next screen, **Reason for Leaving**, enter a leave date and choose the **Reason for Leaving** from the following:

- 1 – Stop contributions
- 2 – Left employment
- 3 – Death

Once you have entered the necessary information click **Next**, this takes you to the **Royal London Leavers for....** which gives you a summary of the file contents. Click **Create File** to create the Royal London Leavers file.

**Please Note:** If the employee has either a **Left Date; Opt-out Date** or **Contributions Ceased Date**, within the date range/period selected, the **Reason for Leaving** and **Leaving Date** columns will be completed based on this data. If an individual has more than one of above mentioned dates, the latter of the dates will be entered along with the corresponding **Reason for Leaving**.

The **Reason for Leaving** and **Leaving Date** can be amended manually if necessary.

The **Royal London Leavers for...** screen data is based on the following:-

- **Number of employees who have left employment**  
This will show the number of employees where the **Reason for leaving** is set to **Left employment**
- **Number of employees who are deceased**  
This will show the number of employees where the **Reason for leaving** is set to **Death**
- **Number of employees who have stopped contributions**  
This will show the number of employees where the **Reason for leaving** is set to **Stop contributions**

### Standard Life Joiners File

The Standard Life Joiners file now includes the required site codes.

### Scottish Widows Pension Output File

The Scottish Widows V3 Pension Output File has been updated and the field AA – Total Assessment Earnings will be populated with the total Qualifying Earnings.

When creating the Scottish Widows V3 Output File, if an employee has a Join Date, the Contractual Scheme Join Date, column Q will now be blank.

### Pension Deductions

The following Pension deductions have been renamed:

- **Auto Enrolment (With Tax Relief)** has changed to **AE Qualifying/Banded Earnings (With Tax Relief)**
- **Auto Enrolment (Salary Sacrifice)** has changed to **AE Qualifying/Banded Earnings (Salary Sacrifice)**
- **Auto Enrolment (Stakeholder)** has changed to **AE Qualifying/Banded Earnings (no Tax Relief)**
- **Personal Pension Plan/Stakeholder** has changed to **Personal Pension Plan (no Tax Relief)**
- **Normal Pension (With Tax Relief)** has changed to **Net Pay Arrangement (With Tax Relief)**

## RTI

### Employer Payment Summary

Changes have been made to the software enabling you to resend an EPS for a previous month where **No Employees Paid in Current Month** is selected. This is only to be used where you have not submitted an EPS to report **No Employees Paid in Current Month** at the correct time.

### Full Payment Submission

The Full Payment Submission will now include addresses for all employees.

### Legislation

In preparation for legislative changes in April 2016 changes have been made to the software to cater for:

- Student Loan Plan Type 1 and Plan Type 2 – Plan 2 can only be used from 06/04/2016
- Scottish Tax Codes

### IRIS OpenSpace Published Reports

Following installation of this update, the names of the following reports, when published to IRIS OpenSpace, have been changed:

Report in payroll	Report name is IRIS OpenSpace
Questions & Declarations	FPS<Year>Declaration.pdf
Anomaly Report	<Year> <Pay Period> Anomaly Report.pdf
Pay Elements Analysis Report	<Year> <Pay Period> Pay Elements Analysis.pdf
Pension Age Report	<Year> <Pay Period> Pension Age.pdf
Pegasus Cheque   Cheque Schedule	Cheque Schedule.pdf
Employee Previous Payroll Figures	Employee Previous Payroll Figures.pdf
P60 HMRC Laser Single Sheet	Employee Previous Payroll Figures.pdf

FPS   Print Summary	<Year> <Pay Period> FPS Summary Page <Number>.pdf
FPS   Print Details	<Year> <Pay Period> FPS Details Page <Number>.pdf
EPS   Confirmation screen   Print	<Year> <Pay Period> EPS Submission Confirmation.pdf Page <number> *
EYU   Print	Earlier Year Update - <employee name>, Amended year to date values for <tax year>.pdf
EYU   Confirmation screen   Print	Earlier Year Update - <employee name>, Submitted values for <tax year>.pdf

\* Page number will only be displayed if the report has more than one page

## Other Issues

### Installation

When installing the software it is essential that your Windows Regional Language | Format is set to English (United Kingdom).

### Employee Pension Details Report

The Totals have been removed from the Employee Pension Details Report.

### Copy Company for Receivership

Auto Enrolment information will no longer be copied into the new company when using **Copy Company for Receivership**.

### NI Rate C

The prompt given in **Employee Details** when a female reaches to change a female employee to C rate NI is now aligned to the Women's' State Pension Age.

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### Tax/NI Pension Rates

A row has been added to include the annual pension bands on the **Pensions – Earnings Thresholds & Rates** section of the **Tax/NI/Pension Rates report**, accessed from the **HMRC** tab.

### Pensions

#### Configure Pension Fund Details

An option has been added to **Configure Pension Fund Details | Scheme Type** section which allows you to choose a longer opt-out period than the minimum specified by The Pensions Regulator. This will cater for pension schemes that allow longer opt-out periods such as Teachers' Pensions and NHS Pensions.

The minimum opt-out period is one month and this can be extended by a further 2 weeks if an invalid opt-out notice is received within the one month opt-out period. This will be the default setting. If you set the opt-out period to a value greater than one month, invalid opt-out notices will not be catered for.

If the opt-out date falls within the opt-out period, a message will be displayed advising of any refund of contributions due.

If the opt-out period has expired but the opt-out date is within 6 weeks after the later of:

- AE Date, or
- Opt-In Date, or
- Information Provided Date

A message will be displayed asking you to confirm if you have received an invalid opt-out notice during the opt-out period and that you have now received a valid opt-out notice. If you confirm this, the opt-out process will continue and the pension deduction will be set to zero.

If the opt-out period has expired the employee may not be entitled to a refund of contributions. Also if the opt-out period has expired a Contributions Ceased Date should be entered, not an Opt-out Date.

The **Output File Fields** have been added to the **Configure Pension Fund Details** screen to allow you to enter default settings for a specific fund.



For ease of use, the information on the **Configure Pension Fund Details** screen, accessed via **Configure Pension Fund | Configure Pension Fund Details | Edit** or **Add New**, has been split into three separate tabs:-

- **General**
  - General Details
  - Scheme Type
  - Pension Details
- **Output Files**
  - Output Files
  - Group/Site Code
  - Payment Source
- **Bank Details**

The following fields have been added to the **Output Files** tab:

- **Unique ID** (moved from **General Details** tab)
- **NEST Employer Reference Number**

**Please Note:** When creating the **NEST Pension Output File**, if **Configure Pension Fund | Configure Pension Fund Details | Pension Fund Details | Output Files | NEST Employer Reference Number** is blank, the software will use the **NEST Employer Reference Number** entered in **Configure Automatic Enrolment | NEST**.

**NEST Group**, **NEST Payment Source** and **Standard Life Site Code** are now set at Fund level and it is no longer necessary to enter a dummy **Employer Reference Number**.

## Pension Refs

Changes have been made to **Employee Details | Pay Elements | Pension Refs | Output File** fields where only the fields relevant to the specified **Pension Fund** will be enabled.

## Qualifying & Pensionable Earnings

An explanation on the difference between Qualifying Earnings and Pensionable Earnings has been added to the software. To view this:

- Click **Company | Payments & Deductions**
- Highlight the relevant Payment or Deduction and click **Edit**
- Click the link '**What are pensionable and qualifying earnings?**'

This link can also be accessed from the **Company | Hourly Rates | Edit** or **Add New**.

## Configure Automatic Enrolment

The **Configure Automatic Enrolment | NEST** tab has been renamed **NEST/Standard Life** together with the following fields on this tab:

- **Employer Reference Number** has been renamed **NEST Employer Ref Number**
- **Group** has been renamed **Group/Site Code**

The frame labels in **Employee Details | Pay Elements | Pension Refs** tab, previously called **NEST Details** and **Output File Fields**, will now match the **Pension Fund** specified in **Employee Details | Pay Elements | Pensions**.

## Add field for Join Date

In **Employee Details | Pay Elements | Pensions**, **Opt-In/Join Date** has been split into two separate fields, 'Opt-In Date' and 'Join Date'. This is to cater for employees with a **Join Date** who are not entitled to opt-out and receive a refund of contributions. If you have an employee who has an **Opt-In/Join Date**, this will remain in the **Opt-In Date** field. If the date entered relates to a **Join Date**, you will need to change this manually.

## Company Pension Dashboard

A new **Company Pension Dashboard** has been added to the software displaying the pension status of each employee in the Company. You can display **All**, **Current**, **Current + Leavers** or filter based on **AE Status**. From this screen you can:

- View historic pension information
- Enter Opt-in Dates
- Enter Opt-out Dates
- Enter Join Dates
- Enter Contributions Ceased Dates
- Publish Pension Communications

## Opt-in

Clicking **Opt-in** allows you to enter the **Opt-in Date**, **Pension Scheme** and **Employee / Employer contributions** for the selected individual.

## Opt-out

If you have received a valid Opt-out Notice for an employee, click the **Opt-out** button to enter the **Opt-out Date** and click **Calculate** to automatically calculate the refund amount for Employee's and Employer's pension contributions for the selected individual. To view the breakdown of the refund calculation click **Pay Details**. The refund will be processed in the current pay period and the Employee and Employer pension deduction standard values will be set to zero with the Pension Fund set to none.

If you tick '**Do not refund in payroll**' no refund will be given and the year-to-date value will not be altered. If necessary you can amend the refund values calculated prior to calculating the payroll.

An **Opt-out** button has also been added to **Employee Details | Pay Elements | Pensions**. When clicked this will display the **Pension Opt-Out** screen.

**Please Note:** an employee with a **Join Date** is not entitled to opt out of a Pension Scheme. If the employee wishes to stop contributions, a **Ceased Contribution Date** should be entered.

## Join

Click **Join** to enter a **Join Date**, **Pension Scheme** and **Contributions** for the selected employee. A **Join Date** can only be entered for an entitled worker and must be after the company's staging date.

## Cease

This button allows you to enter a **Cease Contributions Date** for the selected individual. This feature allows you to set the employee and employer pension contribution rates for the selected employee to zero and no further pension deductions will be taken.

If the **Ceased Contributions Date** is after the last day of the current pay reference period, a message will be displayed with two options:

- Click **Yes** to set the employee and employer contributions rates to zero and prevent any further pension deductions being made
- Click **No** will mean that pension deductions will continue to be made until you set the values to be zero manually

## Employee AE History

A new function '**Employee AE History**' has been added to the software and is accessible from both the **Pension** tab and the **Company Pension Dashboard**. Using this function you can view and/or print the AE history for all pay periods in the current or previous tax years providing assessment data is available for the selected period.

Employee AE History screen displays:

- Pay Period
- Worker Status
- AE Assessment
- AE Date
- Deferral Date
- In Pension

## AE Assessment

A new button, '**AE Detail**', has been added to the **Pay | Enter Variations | Preview** screen. Click this button to display a screen where you can view and/or print the information an employee's assessment is based on. A button to view the information historically has also been added to the **Pay | View Payroll History | Pay Details | Historic Pay Preview** screen. Clicking **Print** will produce the new **AE Assessment Outcome Report** detailing information as per the screen.

This screen can also be accessed from the **Pay Period Dashboard**.

## Pay Period Dashboard

To help simplify the Automatic Enrolment process, a dedicated **Pay Period Dashboard** has been added to the software, accessed from the **Pension** tab. This screen displays information as per the **Company Pension Dashboard** for each employee but based on selected pay periods. You can select an individual to view their pension information, enter **Opt-out Dates** and link to the **Publish Pension Communications** screen.

## Output Files

The following changes are based on the **Output File** selected in the **Pension Fund** in **Employee Details | Pay Elements | Pensions**:

### Aviva

- **Friends Life/Now Pensions – Category** has changed to **Category ID**
- **Peoples Pension – Worker Group ID** and **Scottish Widows Pay Group/Now PAY CODE** fields are renamed **Not in use for this fund**

## Friends Life

- **Friends Life/Now Pensions – Category** has changed to **Employee Category**
- **Peoples Pension – Worker Group ID** and **Scottish Widows Pay Group/Now PAY CODE** fields are renamed **Not in use for this fund**

## Now Pensions

- **Friends Life/Now Pensions – Category** has changed to **Scheme Code**
- **Scottish Widows Pay Group/Now PAY CODE** is renamed **Pay Code**
- **Peoples Pension – Worker Group ID** field is renamed **Not in use for this fund**

## Peoples Pension

- **Peoples Pension – Worker Group ID** is renamed **AE Worker Group**
- **Scottish Widows Pay Group/Now PAY CODE** fields is renamed **Not in use for this fund**

## Scottish Widows

- **Peoples Pension – Worker Group ID** is renamed **Pension Provider Worker Group**
- **Scottish Widows – Pay Group/Now PAY CODE** has changed to **Pay Group**
- **Friends Life/Now Pensions – Category** has changed to **Not in use for this fund**

**Please Note:** If you are using Standard Life, the **Group** in the **NEST** section will be called **Site Code**.

## Pension Reports

### Pending Pension Refunds Report

This is a new report that has been added to the software that displays refunds due, after opting-out, that have not yet been processed. This report can be printed from **Pension | Print Pension Reports**.

### Pension Refunds Report

This is a new report that has been added to the software that shows opt-out refunds paid in selected period(s). This report can be printed from **Pension | Print Pension Reports**.

Both the above reports display the following information:

- Employee
- Opt-out Date
- Employee's Refund
- Employer's Refund

## Dashboard – IRIS Bureau Payroll only

### Staging Date

A new column '**Staging Date**' has been added to the **Clients** screen on the **Dashboard**. This allows you to see, at a glance, each Clients' Staging Date.

### Client List Report

Staging Date is now included in the Client List Report.

### Client Details

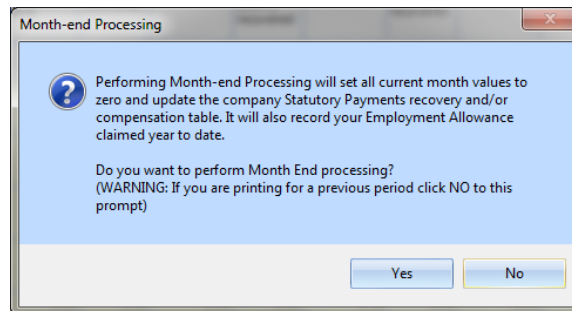
A new tab has been added to the **Client Details** section of the **Dashboard**, '**Auto Enrol Details**'. This tab displays the pension information for the selected Client including:

- Staging Date
- Postponement Period
- Default Pension Fund
- Client Pension Contact Details

## April 2015 Release Notes V2.12.\*

### Employment Allowance

**Important Reminder:** If you are claiming Employment Allowance it is essential that, after printing the P32 Month End Summary, you click **'Yes'** on the Month-end Processing message each Month in order for the Employment Allowance amount to accumulate correctly.



### Employer NI

From 6<sup>th</sup> April 2015, following changes by the Chancellor announced in the Autumn Statement 2013, employers will not be required to pay Class 1 secondary NICS on earnings up to a new **'Upper Secondary Threshold (UST)'** for employees who are under the age of 21. Class 1 secondary NIC will continue to be payable on all earnings above the new **Upper Secondary Threshold**.

The following NI letters have been added to the software and are shown in the table below:

Existing Letter	Under 21 Equivalent
A – Normal	M – Normal
J – Deferral	Z – Deferral
D – Contracted Out	I – Contracted Out
L – Contracted Out Deferral	K – Contracted Out Deferral

During the **Year-End Restart** process any employee under 21 will have their **NI Rate** changed automatically as per the table above. It is therefore important to ensure that all employees' dates of birth are entered correctly into **Employee Details**. Also, when an employee reaches 21 the NI Rate will again be automatically changed as per the table above.

If you are advancing for holidays where the usual pay day in an advanced pay period is after the employee's 21<sup>st</sup> birthday, the NI will be calculated over the 2 applicable NI letters and the payment record will hold the full details.

If you are paying multiple weeks, for example:

- Pay week 1
- Then pay week 3 – the employee's 21st birthday falls within week 3
- The NI will be treated as if advancing for holidays and week 2 would be based on an under 21 NI letter and week 3 would be based on an over 21 NI letter

**Note: If you adjust the number of NI weeks, this would negate the NI split and force a single letter calculation.**

Please note you will not be able to:

- Retrospectively do an NI adjustment to split NI for an employee who was paid in a period for multiple weeks (for example advancing for holidays) then later it transpires that their NI rate changed during the multiple weeks
- If the employee is being paid for a period over multiple weeks with split NI you will not be able to use Tax/NI Override

## Full Payment Submission

From tax year 2015/16, the following fields are mandatory for employees with an NI Rate of D, E, I, K or L and therefore require completion prior to submitting the FPS:

- SCON number (a dummy SCON number will no longer be accepted)
- ECON number

Any ASPP and ShPP paid from 2015/16 tax year will be reported in the ShPP value field on the FPS.

**Note: An FPS submission will fail if you have employees with NI letters D; E; I; K or L and an ECON number is not present.**

## Statutory Adoption Pay

Following changes in legislation, where a placement date is on or after 5<sup>th</sup> April 2015, Statutory Adoption Pay will now be paid at 6 weeks at 90% of average weekly earnings followed by 33 weeks at 90% of average weekly earnings or the low rate SAP; whichever is lower.



## Income Tax

### Transferable Tax Allowance

From tax year 2015/2016, new tax codes have been added to the payroll; 'M' and 'N'. These codes are for use with Transferable Tax Allowance. Transferable Tax Allowance has been introduced for married couples and civil partners. It allows a spouse or civil partner who is not liable to income tax above the basic rate to transfer £1,060 of their personal allowance to their spouse/civil partner, provided the recipient of the transfer is not liable to income tax above the basic rate.

### 50% tax limit

A limit of a 50% tax deduction of gross taxable earnings for all tax codes has also been introduced. If this results in outstanding tax, and the employee is on a cumulative tax code, this will then potentially be recovered in future pay periods.

### Employee Pension Dates Report

A new report, **Employee Pension Dates**, has been added to **Pension | Print Pension Reports**. This report will show any employees with either an Automatic Enrolment Date; Opt-out Date, Deferral Date or Opt-in/Join Date within a specified date range. The report allows you to print per fund or for all funds and to include or exclude leavers in the current year.

If you have employees with either an Automatic Enrolment Date; Opt-out Date; Deferral Date or Opt-in/Join Date and they do not have a pension fund configured in the Employee Details, the employee will be displayed on the report under the header '**No Fund Specified**'.

### FPS & EPS

A new **Print Q & Ds** button has been added to the **Questions & Declarations** screen when submitting your final submission for the tax year. This provides a **Final Submission Questions & Declaration** report for authorisation. HMRC have now made Questions & Declarations non-mandatory, however you will still need to complete the screen. The announcement was made too late for us to change our software.

### Earlier Year Update

#### Sundry

The following new fields have been added to the **Earlier Year Update Sundry** screen for submissions made for 2014/15 onwards:

- Recently Bereaved
- Annual Pension Amount

A new tick box has also been added to the **Sundry** screen '**Enable Annual Pension & Recently Bereaved**'. Tick this box to enable **Recently Bereaved** and **Annual Pension Amount**.

The **Annual Pension Amount** will display the value in **Employee Details | Starter Details | Pensioner | Annual Pension**.

**Note:** with **Enable Annual Pension** ticked and **Recently Bereaved** set to **Yes** or **No**, the **Annual Pension Amount** will be submitted on the EYU. **Annual Pension** is a year to-date field and will overwrite any previously submitted value.

## Text changes

The following text changes have been made to the Earlier Year Update:

- **New YTD Value** has been renamed **Current YTD value**
- **YTD already sent** has been renamed **Previous YTD value**

## EYU - SSP

HMRC no longer require SSP to be reported on EYU submissions for 2014/15 onwards, and we have subsequently removed these fields.

## EYU Submissions

Further options have been added to the software for submitting an EYU. To simplify the process, you now have three options:

### Current process

- Print off the **Employee's YTD** report or make a note of the employee's year to date figures.
- Alter the year to date values by re-calculating the payroll or altering year to date values
- Enter the original values submitted to HMRC in the **EYU | Previous YTD value** section and the system calculates the difference between the new and old year to date values

### Enter the EYU Value

- Tick **Enter EYU Values only**
- Enter the difference between what was sent on the last FPS and what should have been sent
- The **Current YTD Value** and **Previous YTD value** columns will be disabled with this option
- Alter the employee's year to date values in the employee record

## Populate with last pay period values

This option would primarily be used when the last FPS has not been sent for the last period of the year.

- Tick **Populate with last pay period values**
- This option will display the **Current YTD Values, Previous YTD value** and **EYU Value** without any input required

## Employer Payment Summary

A new tick box '**Employment Allowance**' has been added to the **Employer Payment Summary** period information screen. This field will be ticked if **Employment Allowance** is selected in **Company | Company Details | HMRC**.

For information purposes, **Employment Allowance** has also been added EPS confirmation screen and the EPS confirmation report.

The following fields have been renamed on the EPS:

- From tax year 2015/16 any reference to **OSPP** will now be **SPP**
- From tax year 2015/16 any reference to **ASPP** will now be **ShPP**
- **Ceased Trading Date** has been renamed **Date Scheme Ceased**
- **Date company ceased trading** has been renamed **Date Scheme Ceased**

## No employees will be paid for future months

You can now enter a period of inactivity using **No employees will be paid in future months** for a period of up to 12 months; this can also span tax years. Previously this was limited to 6 months.

## Changes to Parental Leave

Following legislative changes there have been amendments to parental leave from the 2015/16 tax year:

- Additional Statutory Paternity Pay and Leave will be abolished for babies due/placed on or after 5<sup>th</sup> April 2015
- Shared Parental Pay and Leave will be introduced for parents where the child is due/ placed on or after 5<sup>th</sup> April 2015

## Shared Parental Leave

Shared Parental Leave is a new entitlement allowing eligible mothers, fathers, partners or adopters to choose how to share time off work after their child is born or placed. It is thought this will give parents more flexibility to share the care for their child in the first year following either birth or adoption. Shared parental leave will allow both parents to share the leave, which can be taken at the same time or separately. SMP and OSPP (renamed SPP) remains unchanged.

When you install the April 2015 update:

- Any reference to **OSPP** has changed to **SPP**
- With a few exceptions, **ASPP** will be referred to as **ShPP**
- Any ASPP recorded will be combined with ShPP for reporting and RTI filing
- The text '**SMP, SAP, OSPP & ASPP**' has been renamed '**SMP, SAP, SPP & ShPP**'
- The text '**SMP, SAP, OSPP & ASPP Recovered**' has been renamed '**SMP, SAP, SPP & ShPP Recovered**'

In the **Employee Absence** section of the **Employee** tab, a new icon has been added to enable you to create a record for ShPP. When starting a new Shared Parental Pay period, it is necessary to enter some mandatory information to allow calculation of the amounts due each period. The following fields require completion:

- First Day to Have ShPP
- Partner's Surname
- Partner's Forename
- Partner's NI Number
- Number of ShPP Weeks to Pay
- Number of ShPP Weeks Already Paid

The following fields have been added to **Export Data**:

- ShPP Current Month
- ShPP Paid This Period
- ShPP Paid To-date

The following fields have been added to **Import Data**:

- Initial ShPP YTD
- ShPP To-date

## Pension Output Files

### People's Pension v 8.1

People's Pension v 8.1 has been added to the software in addition to the existing People's Pension output file. If you have People's Pension selected in **Pension | Configure Pension Fund | Add New** or **Edit | Output Files – File Output** field, the **Include** field will default to **This Fund Only**.

### Standard Life Joiners

The Standard Life Joiners file has been updated with required changes.

## Now Pensions

Now Pensions V1.2 Output File has replaced Now Pensions in the software. The Output Files available in the software for Now Pensions are Now Pensions V1.1 and Now Pensions V1.2.

The file format for Now Pensions V1.2 has been updated as some fields are now mandatory.

A new mandatory field is **PAY CODE**. To cater for this, in **Employee Details | Pay Elements | Pension Refs**, the field **Scottish Widows – Pay Group** has been renamed **Scottish Widows – Pay Group/Now PAY CODE**. This field requires completion for all employees in the Now Pensions V1.2 Output File.

## Standard Life G2G Joiners

The Standard Life G2G Joiners file layout has changed, therefore when uploading the output file you may need to re-map the fields on the Standard Life website accordingly. This should only need to be done once following the installation of the April update. We are unable to assist with the re-mapping on the Standard Life website and any queries in this regard will need to be referred to them.

## Period for Contribution Schedule

When creating the **Pension Output File**, on the **Period for Contribution Schedule** screen we have added a section '**Pay Period**'. This allows you to specify the **Pay Frequency** from the drop-down list and enter the **Period No** required.

## Licence Terms & Conditions

When installing an update you are now able to **View**, **Print** and **Accept** the Software Licence Terms and Conditions whether installing manually, via website download or via Auto Update.

**Please Note: If you do not accept the Terms & Conditions the install update process will stop but you can still log into the software as normal. The next time you open the software you will be prompted to install the update again.**

The payroll software now includes IRIS OpenSpace, a cloud solution allowing you to share documents with your clients. You are able to publish payroll reports to the IRIS OpenSpace online portal and your clients are then able to log into IRIS OpenSpace to view and/or approve the reports.

IRIS OpenSpace can incorporate your branding, colours and logos both online and in all communications; this provides a fully branded portal to your clients where they can safely and securely exchange their confidential information with you.

For further information please contact Sales.

## Online Login Details

In the admin section of the software, a sub menu has been added to **File | Online Login Details** displaying the following sub menu items:

- **OpenEnrol/OpenPayslips Login Details**
- **OpenSpace Login Details**

## Company Details

A new tab '**OpenSpace**' has been added to the **Company | Company Details** screen allowing you to select or create the OpenSpace client linked to the payroll company.

## Pensions

Pension Parameters for Auto Enrolment have been updated for the tax year 2015-2016.

The State Pension Age has been updated for 2015-2016.

## Legislation

### Student Loan

The Student Loan Threshold has increased to £17335.

### Tax, NI, SSP, SMP, SAP and SPP

The rates for tax, NI and statutory payments have been updated for 2015-2016.

### Tax Code Changes

In line with legislative changes, moving into the new tax year (2015/16) will automatically uplift tax codes as required.

## Real Time Information Audit

In **Online Services | View Audit**, a new column '**Final Submission**' has been added to:

- **Full Payment Submission Log for tax year** - If **Final Submission for tax year** was ticked when sending the FPS, this column will display **Yes**
- **Employer Payment Summary Log for tax year** - If **Final Submission for tax year** was ticked when sending the EPS, this column will display **Yes**
- **IRIS Bureau Payroll only** has a new column on the **Dashboard** that will display, at a quick glance, if you ticked **Final Submission for tax year** when sending an EPS or FPS

## Dashboard (IRIS Bureau Payroll only)

A new tick-box '**Use Notional Pay for Employee Pension**' has been added to the **Dashboard | Employees | Employee Details | Pay History** screen. This tick-box will be updated in accordance to the option selected in **Pay | Enter Variations**.

## Other Issues

### PCR78881 – People's Pension

Column X in the file format for People's Pension has been amended and will no longer display the Auto Enrolment Date when an employee has been auto enrolled.

### PCR78797 – AE Pension Recalculation

The issue occurring when recalculating payroll where pensions are not being removed or changed if they are different from the original calculation has now been rectified.

### PCR78402 – OpenEnrol Letters

If using IRIS OpenEnrol, Letter 6 will now also be generated and published to IRIS OpenEnrol if:

- The employee isn't a member of a qualifying scheme prior to running the payroll and
- The employee's Start Date is in the previous pay period to the current one and
- This is the employee's first assessment and
- The employee is NOT enrolled in the current pay period and assessed as a Non-eligible Jobholder or Entitled Worker

### PCR77905 – Accounts Office (Bureau edition only)

After installing the April update, if you have the **Accounts Office** set to Shipley this will automatically be changed to Cumbernauld. Shipley will also be removed from the drop-down options for **Accounts Office**.

### PCR77017 – RTI Audit

The Submission Log for FPS and EPS now includes a column '**Final Submission**' which will display '**Yes**' or '**No**' based on whether **Final Submission for tax year** is ticked.

## PCR78877 – Report Settings

### IRIS Payroll Business

When using **Print Favourites** the printer used will be as per the selection in the **Current Printer** field, not the report printer settings.

### IRIS Bureau Payroll

When using **Print Client Reports** the printer used will be as per the selection in the **Current Printer** field, not the report printer settings.

## PCR72373 - Back up

If you are using Windows XP or later you are unable to back up to CD or DVD. We advise that you back up to an alternative device, such as a USB flash drive.



## 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 calculations, 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	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk