



IRIS Payroll Business

Release Notes

16/02/2015



Dear Customer,

Welcome to your software update for payroll year end 2014/2015. 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

The minimum system requirements can be found on our website:

- **IRIS Payroll Business**
- **IRIS Bureau Payroll**

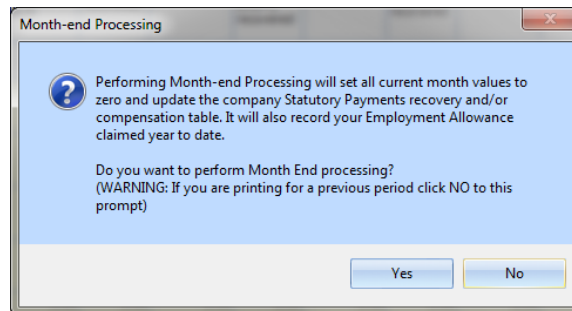
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April 2015 Release Notes V2.12.*

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 6th 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 21st 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 5th 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

Marriage Allowance

From tax year 2015/2016, new tax codes have been added to the payroll; 'M' and 'N'. These codes are used for Marriage Allowance (previously referred to as Transferable Tax Allowances 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 5th April 2015
- Shared Parental Pay and Leave will be introduced for parents where the child is due/ placed on or after 5th 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 Cumberland. 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.

Summer 2014 Release Notes V2.11.*

IRIS OpenEnrol

IRIS OpenEnrol is a new module that has been added to the software. IRIS OpenEnrol is a new way to distribute pension communications to employees. Any letters that need to be sent to employees, in order to comply with legislation, are created automatically when you run payroll. They will then be published to the secure online IRIS OpenEnrol portal. Once employees have registered with the portal they are able to quickly view all of their letters in an easy to access, secure area. If an employee does not have an account but has an email address configured, they will receive a prompt to configure their account.

Note: To purchase the **IRIS OpenEnrol** module, please contact our sales team.

Automatic Enrolment Summary

The **Automatic Enrolment Summary** has been amended and will now include any changes to **Worker Status** occurring during payroll run. However, if you make a manual change to an employee's **Worker Status** in **Employee Details**, this will not be shown. If you have **Audit** enabled manual changes will be recorded here.

Opt-out

Following the installation of this update, if an **Opt-out** date is entered into **Employee Details | Pay Elements | Pension** a message will be displayed asking you to confirm you require the employee's pension deduction standard value for the associated **Pension Fund** to be set to zero.

Please Note: If your employee has other pension deductions assigned that are not associated to the Pension Fund, these will have to be set to zero manually.

Payroll – Auto Enrolment / IRIS OpenEnrol

When you recalculate the payroll, employees will now be re-assessed in relation to **Auto Enrolment** and **IRIS OpenEnrol**. For example, this could result in standard pension deductions being assigned or Auto Enrolment dates being unset.

Online Login Details

In the **Admin** section of the software, **OpenPayslips Login Details** has been renamed **Online Login Details**.

Employee Details

Transitional Period

A new tick-box, '**Transitional Period**' has been added to **Employee Details | Pay Elements | Pension**. This is to be used when an employee has the right to join a Defined Benefits or Hybrid Pension Scheme and you are applying a **Transitional Period**.

Please Note: The **Transitional Period** should be ticked prior to running the employee's first payroll under automatic enrolment. If you have the **IRIS OpenEnrol** module, this triggers Letter 1T as part of the legislative requirements.

Transitional Period has also been added to the available import/export fields. It has also been added to **Company | Global Changes | General**.

Member of Qualifying Scheme

Member of a Qualifying Scheme will now be automatically be ticked if the following apply:

- A **Pension Fund** has been selected in **Employee Details** and
- The **Pension Fund** has the **Qualifying Scheme** box ticked via **Pension | Configure Pension Fund | Add** or **Edit**

Pension Status Report

Transitional Period has been added to the **Pension Status Report**.

Configure Auto Enrolment

A new tab, **Contact Details**, has been added to **Pension | Configure Auto Enrolment**. This enables you to enter your contact details specific to pensions. It is essential to complete these fields if you are using IRIS OpenEnrol.

A new **Link to OpenEnrol** tick box has been added to the **Pension | Configure Automatic Enrolment** screen.

Further information regarding the above can be found in the **Pensions Guide**.

Contributions Ceased Date

Employees with a **Contributions Ceased Date** entered in **Employee Details | Pay Elements | Pensions** and have never been automatically enrolled will now be assessed. If they meet the qualifying criteria, they will be automatically enrolled.

Configure Pension Fund Details

The following fields have been added to the **Pensions | Configure Pension Fund Details | Add New/Edit**:

- **Email Address** – this allows you to specify an email address at the Pension Company for employees to send Pension queries to
- **Website** – here you can specify the Pension Company's website
- **Employee Portal** – enter here the Pension Company's Employee Portal, if applicable
- **Scheme Type** – select the scheme type from the drop-down list
- **Qualifying Scheme** – specify if the **Pension Type** is a **Qualifying Scheme**. If you tick this option, you will be asked if you want to set all employees in this fund as a **Member of a Qualifying Scheme**.

Note: **Member of a Qualifying Scheme** should be selected, if applicable, prior to running the payroll for the first time under Auto Enrolment.

Note: If you have a **NEST Pension Fund**, the **Qualifying Scheme** will be ticked automatically and employees will have **Member of a Qualifying Scheme** ticked.

Direct Earnings Attachment

Direct Earnings Attachment (DEA) has been renamed **Direct Earnings Attachment – Percentage**.

A new **Direct Earnings Attachment - Value (£)** has been added to the **Payments & Deductions | Configure Attachment of Earnings Orders | Add New/Edit | Type** to allow you to specify a fixed amount rather than using the tables/percentage method.

The **Direct Earnings Attachments** will no longer include a carry over where either a partial deduction or no deduction is made. However, you can enter a shortfall manually if there was an instance where you had not deducted the **Direct Earnings Attachment** when it should have been.

Direct Earnings Attachment Reports

Direct Earnings Attachment – Value (£) has been added to **AEO & Loan Summary By Employee** and **AEO & Loan Summary By Agency**.

Payroll Summary

The **Payroll Summary** now includes information for employees that have been advanced and **Payroll Summary with Year To Dates** will now include advance and leaver information.

IRIS OpenPayslips/P60s

Reports

A new report has been added specifically for use with the IRIS OpenPayslips module.

Unpublished

The option to print payslips and P60s for employees with no email address, which therefore cannot be published, has been added to the software.

The option '**Print unpublished payslips**' has been added to the Report Preview screen, Payslip Options | Additional Options section

A **Print Filter** option has been added to the toolbar when printing P60s. **Print Filter** will give you the following options from a dropdown menu:

- All Employees
- Employees with email address
- Employees with no email address

To purchase the **IRIS OpenPayslips/P60s** module, contact our **Sales Department**.

Paying Expenses

A change has been made to the **Pay Preview** screen; net payments and Nlable only payments will now be displayed as **Payments** rather than negative **Deductions**.

Other Payments has been added under the **Pay Year-to-date** section of the **Pay Preview** screen.

Finalise Remaining Periods

A tick box, '**Finalise all remaining periods**' has been added to the **Pay Period Set Up Wizard** screen. This function will automatically finalise all periods for the selected pay frequency up to the end of the tax year.

Earlier Year Update

A new report has been added to the software, **Employee YTDs** report. This report is available for selection from **Report Manager | Employee Reports**.

Please Note: You must print this report **prior** to adjusting an employee's year to-date figures in **Employee Details**.

Configure Auto Enrolment

Default Pension Deduction

You can now amend the **Pension Payments & Deductions Value** on the **Configure Automatic Enrolment | Pension** screen. To amend, click '**Edit Values**', make the change and then click '**Save**' then '**OK**'.

Pension Fund

In **Configure Auto Enrolment | Pensions**, the field **Pension Fund** has been renamed **Default Pension Fund**.

Support Tab

A new button '**Support**' has been added to the **Help** tab, **Support Tools** section. This button will provide a dropdown menu to assist you with any queries you may have. The **Remote Assistance** button has been moved from **Support Tools** to the **Support** dropdown menu.

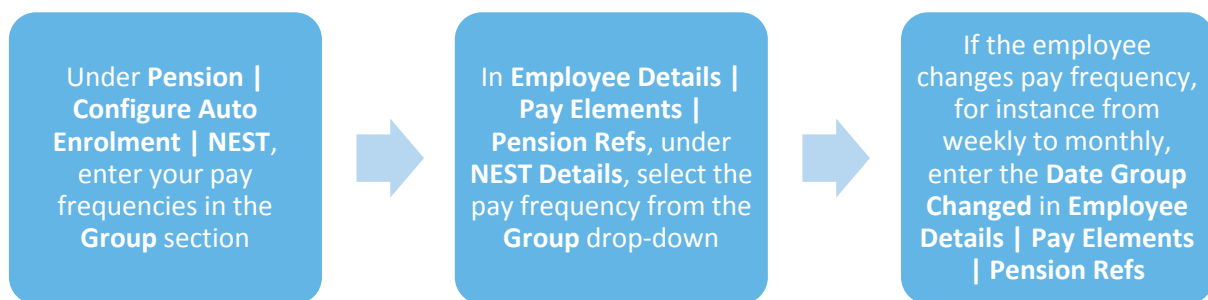
- **Call Wait Times** – view our call waiting times
- **Check Version** – check you are using the latest release, download the latest release and view release notes
- **Document Library** – a link to our document library containing useful guides and information regarding your software
- **Email Support** – send an email to our experienced support representatives
- **HMRC Updates** – keep up to date with HMRC news and changes
- **Knowledge Base** – answers to common questions
- **Remote Assistance** – allows our support representative to connect to your desktop if required

Pension Output Files

Under Pension | Create Pension File we have added the following formats:

- **Now Pensions v1.1**
- **Scottish Widows Version 3**
- **Standard Life G2G Joiners**
- **Standard Life G2G Payments**

If you have multiple pay frequencies for a Company and you are using the **Standard Life G2G Pension Output Files** the following steps need to be taken:



Please Note: The Standard Life G2G file only requires a **Reason for Reduced Employee Contribution** if there is a zero contribution.

Please Note: If you experience problems uploading your output file, we recommend you check the file version with your pension provider

On Hold/Advanced

Changes have been made to simplify the process if you have no employees to pay in a period. If the system recognises that there are no employees found to pay in the period and you need to move the **Payroll Calendar** to the next period, a message will be displayed asking if you want to update the **Payroll Calendar**. If you click **'Yes'** to the message, the **Payroll Calendar** will be moved to the next period for the pay frequency.

Employer Payment Summary

The option to submit an EPS when there are no employees in the Company has been added to the software. This allows you to submit an EPS detailing CIS Suffered when there are no PAYE employees to report.

Auto Enrolment Summary for Period

A new report, **Auto Enrolment Summary for Period**, has been added to **Print Pension Reports**. This report can be printed each period to see which employees have been auto enrolled in the selected period and which employees haven't together with the reason why.

Reasons not Automatically Enrolled will be detailed as one of the following:-

- **Earnings too low** – this will be shown for any employees whose earnings are below the Automatic Enrolment trigger threshold or below the Qualifying Earnings lower threshold
- **Aged 16-21**
- **State Pensionable Age**
- **Age 75+**
- **Deferred** - displays all employees with a **Deferral Date**

Report Changes

Pension Status Report

The **Pension Status Report** will now display the **Pension Fund** as detailed in **Employee Details | Pay Elements | Pensions | Pension Fund**.

Pension Fund Employees Report

Changes have been made to the **Pension Fund Employees Report** allowing you to filter the report by Department.

Moving an employee

New fields have been added to the software to allow you to transfer employees from one company to another, where the PAYE reference is the same, without having to include starter/leaver details on the FPS.

A new tab **System Settings** has been added to the **Application menu | Options** button. Here you can choose **Display Send Leave Date? On the issue P45 screen**. With this option ticked, **Send Leave Date** will be displayed on the **Issue P45 for....** screen. If you want the setting to be copied to all companies, click **Apply to All Companies** and then **Yes** to the message, then **OK**.

Previous Employee Code has been added to **Starter Details | New Starter** screen for you to enter the employee code from the original company.

These fields should **ONLY** be used when transferring an employee to another company with the same PAYE reference or if you are moving from another payroll system to IRIS software and are using different employee codes.

Notional Salary

A **Notional** field has been added to **Employee Details | Pay Elements | Salary & Rates** tab which can be used to calculate employers' pension contributions when an employee is on unpaid or part-payment family leave and the employer still contributes to pension based on normal pay. A new tick box has also been added to the **Enter Variations | Statutory Payments** tab, '**Use Notional Pay for employer's pension**'. With this box ticked, the software will use the **Notional** amount when calculating the Employer's pension contribution instead of **Pensionable Pay**.

To use this function:

- If necessary, enter the **Notional** amount in **Employee Details | Pay Elements | Salary & Rates** tab.
- In **Pay Variations** for the employee, under the Pay section, tick the box '**Use Notional Pay for employer's pension**'

Please Note: Once the box is ticked, it will remain ticked for subsequent payrolls for the employee until it is un-ticked. You need to have the Pension module enabled and the pension deduction assigned.

Import/Export

Following the introduction of Workplace Pension Reform, the following fields have been added to these areas of the software:

Import Data:

- Contributions Ceased
- Pension Fund
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID

Please Note: Pension Funds will need to be configured prior to importing

Export Data

- Contributions Ceased
- Pension Fund
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID
- Staging Date

Global Changes

- Automatic Enrolment Date
- Contributions Ceased
- Date Group Changed
- Date Payment Source Changed
- Deferral Date
- Opt-in/Join Date
- Opt-out Reference
- Pension Fund
- Pension Information Provided
- Pension Output Field – Category
- Pension Output Field – Pay Group
- Pension Output Field – Worker Group ID
- Staging Date

Annual Scheme Indicator

The option to process an employee's payroll annually has been added to the software. It is reported to HMRC via the FPS. This method of calculation will use the annual thresholds for tax, NI and pension in two different ways:

Annual Scheme

The **Annual Scheme** is used when:

- All employees in the company are to be paid once in the tax year, in the same period
- The employer is only required to pay HMRC annually

To use an **Annual Scheme**, in **Company Details | Company** tick the **Annual Scheme** box. A message will be displayed asking you to confirm that all employees in this company will be paid annually, in a single tax month, and that you are only required to make payments to HMRC annually.

Please Note:

- If you are using the **Annual Scheme** indicator, you will need to calculate average earnings and enter statutory payments manually
- If employees have already been paid in the current tax year you will not be able to set the **Annual Scheme** indicator
- You will need to **Select the next Pay Date** for the annual payment in **Company | Payroll Calendar** for the appropriate pay frequency

Pay Annually

Pay Annually is used mainly for pension payments. Please note:

- Payments can be made to employees in different pay periods, for instance some employees in April and some in July
- Payments to HMRC can be made more than once a year
- You can place employees on hold until they require payment

To set an employee as **Pay Annually** go to **Employee Details | Tax & NI** tab and select **Pay Annually**.

Please Note: When using either **Pay Annually** or **Annual Scheme**, if an employee has a week 1/month 1 tax code, the standard tax code will be used, not the week 1/month 1

Please Note: When using **Pay Annually** or **Annual Scheme** we recommend you enter statutory payments calculations/payments manually

Pension Summary for Period

A new report, **Pension Summary for Period** is also available in **Report Manager | Pension**. This report will show:

- Employee
- NI Number
- Notional Pay
- Pensionable Earnings
- Qualifying Earnings

To purchase the **Pension** module, contact our **Sales Department**.

Full Payment Submission

PAYE Ref

PAYE Ref has been added to **Print Summary** when submitting your FPS.

Zero Pay

Full Payment Submissions will now include employees who have been processed with zero pay.

Auto Update

We have added the ability to send messages to customers via the auto update process, allowing you to receive useful information without delay. Any messages will be available each time you log into the software.

You can choose to enable auto download messages by ticking the box in **Admin** under **File | Messages from IRIS**.

From **Help | Messages from IRIS** in IRIS Payroll, you can also view or delete old messages by highlighting the relevant **Message Type** and selecting '**View Message**', '**Delete Message**' or '**Delete All Messages**'.

Subtract Basic Rate Tax

In **Pension | Configure Pensions | Add/Edit**, the option to tick the box **Subtract Base Rate Tax** is now available for **Automatic Enrolment (Stakeholder)** pensions.

Default Printer

A new section, **Report Settings**, has been added to the **Report Manager**. This allows you to specify:

- Printer Name
- Paper Source
- Sort Order

The **Paper Source** drop down will display the available printer trays for the selected printer in **Printer Name**. If the chosen **Paper Source** is no longer available for the selected printer, the **Paper Source** will be set to default.

Pension Status Report

The following changes have been made to the **Pension Status Report**:

- Leavers will no longer be included on the report
- A new page has been added that will list employees that will include employee excluded from Automatic Enrolment, working outside the UK and no in any pension scheme. This page will be printed if **Fund** is set to '**All**' in **Report Options**

NEST Contributions Schedule – Withholding pension deductions

Employees who have been excluded on the **NEST – Exclude Employees for...** screen will now be included in the pension file created but with zero values.

Details of the **Number of Employees with excluded contributions** will be displayed on the **NEST – Contribution Schedule Confirmation** screen.

Full Payment Submission

The FPS has been changed to only include leavers and employees with payment after leaving in the next FPS sent for the pay frequency the employee is set too.

Aviva Joiners Category ID

Aviva Joiners Category ID will now be set to **Friends Life/Now Pensions Category ID**.

Configure Client Reports (IRIS Bureau Payroll only)

The **Email Address** field in **Reports | Configure Client Reports** has been extended.

Configure Pension Fund

The following tick boxes have been added to **Pension | Configure Pension Fund | Edit/Add New, Output Files** section:

- **Add Employee contributions to Employers**

'**Add Employee contributions to Employers**' is to be used for certain salary sacrifice pensions where configuration on the pension provider website is set for employer contributions only. If configuration is set this way, the pension provider expects the employee contributions to be zero.

With **Add Employee contributions to Employers** ticked, when you create the output file, the employee contribution can be added to the employer contribution resulting in the employee contribution being set to zero in the output file.

Restoring Leavers

HMRC now allow you to restore a leaver, in the current year, and continue to pay the employee where the leaving date has already been submitted via an FPS. This function would generally be used in the scenario where you have made the wrong employee a leaver and already submitted the FPS.

When you restore a leaver, a message will be displayed giving you the options to:

- Continue paying the employee or make an adjustment to their final pay
or
- Make an additional payment to the employee after they have left

Bespoke Pension Files

The facility has been added to allow the creation of bespoke pension files.

If you have a bespoke pension file, this will be accessed via **Pension | Create Pension File | Select file to create.**

For further information please contact our sales team.

NEST Contribution Schedule

The **NEST - Contribution Schedule** version 5 will be installed automatically when the update is installed.

NEST now permit the **NEST - Contribution Schedule** to include employees paid in the **Date Range** selected but who have a **Leaving Date** prior to the start of the **Date Range**.

Pension FAQs

A new button has been added to the **Pension** tab called **Pension FAQs**. This will link you to the IRIS website offering you advice with regards to frequently asked questions.

IRIS OpenBooks Export

If you have the **IAS Integration Module, Employment Allowance** has been added to the OpenBooks export file.

Theme Options

Under **Application menu | Options | System Settings**, a new feature has been added, **Theme Options**. This allows you to choose from the following settings:

- Classic
- Dark
- Silver

Software available from IRIS

IRIS Payroll Basics

Free, RTI compliant payroll software for companies with fewer than 10 employees

IRIS Payroll Business

Intelligent, easy to use payroll software for smaller businesses

IRIS Payroll Professional

Flexible payroll software for medium sized businesses

IRIS Bureau Payroll

Intelligent management for multiple payrolls

IRIS OpenPayroll

Cloud-based UK payroll software – accessible from anywhere on PC, Mac or tablet

IRIS P11D

The easy way to complete employee expenses and benefits returns

IRIS HR Manager

The easy way to keep employee data up-to-date

IRIS OpenPayslips

A secure web based solution that allows your employees to access and download their e-payslips via an online portal

Stationery order line

0844 815 5656

HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: helpdesk@ir-efile.gov.uk

HMRC employer helpline

Tel: 0300 200 3200

HMRC employer helpline (for new business)

Tel: 0300 200 3211

Support

Tel: 0844 815 5661 (option 4)

Fax: 0844 815 5665

Email: ipsupport@iris.co.uk