



Release Notes

GP Payroll

April 2018



Release Notes

Welcome to your software update for the April 2018. This update of the software includes some new features and enhancements together with any necessary legislative changes. These notes provide information on all the improvements to the software; for detailed information on legislative changes click [here](#). If you encounter any difficulties, please visit:

www.iris.co.uk/contactus

The minimum system requirements can be found on our website:

- **GP Payroll**

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PAYE Legislation

Relief at Source for Scottish Tax Payers

From April 2018, following a legislative change, relief at source for employees with a Scottish tax code will now be calculated using the basic rate for Scotland. Previously, relief at source calculations were based on the UK basic rate. Scottish Tax Codes have a prefix of S.

This will only affect individuals who have pension deductions with **Deduct Basic Rate Tax** set.

Tax Codes

We have updated the payroll software to allow tax codes D0 – D8 and SD0 – SD8.

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

The rates for tax, NI and statutory payments have been updated for 2018/2019.

Tax Code Changes

In line with legislative changes, moving into the new tax year (2018/2019) will automatically uplift tax codes as required.

Student Loan Thresholds

The annual thresholds for 2018/2019 have been updated.

Pensions

NHS Pension Rates

The Pension Tiers for NHS England/Wales and NHS Northern Ireland have not been changed for 2018/2019.

The updated NHS Scotland Pension Tiers for 2018/2019 are:

Pensionable Pay Band Contribution percentage rate

■ Up to £16,928	5.2%
■ £16,929 to £22,439	5.8%
■ £22,440 to £27,910	7.3%
■ £27,911 to £51,481	9.5%
■ £51,482 to £73,498	12.7%
■ £73,499 to £114,760	13.7%
■ £114,761 and above	14.7%

Auto Enrolment

As per the Auto Enrolment legislation, minimum Employer and Employee Contributions will increase in April 2018 and April 2019 as per the table below. During the **End of Year | Transfer employee details into the next tax year** process, a warning message will be displayed advising you to check your employees' pension contribution rates – it is important that you carry this out to comply with the regulations. For further information on the TPR minimum contribution rates click [here](#).

Automatic Enrolment Scheme

Date	Employer minimum contribution	Total minimum contribution
06/04/18 – 05/04/19	2%	5% (including 3% staff contribution)
06/04/19 onwards	3%	8% (including 5% staff contribution)

Salary Sacrifice Employer's NIC Saving Deduction

We have added the following new fields to the **Setup/ Options | Practice Pension Details | Auto Enrolment Details | Pension Fund Details | Alternative Pension Fund Details** screen:

- **Calculate Employers NI Saving**
- **Employers NI Saving** – this field is disabled if **Calculate Employers NI Saving** is unticked

This is to cater for pension deductions set up as a salary sacrifice (resulting in an employer NI saving) where an Employer can 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 %**.

The **Employers NI Saving** will be automatically added to the Employer Pension contribution in reports, payslips and cumulative figures.

Pensionable Pay

The **Payroll Calculations | Pensionable Pay Temporary Adjustments** screen is now accessible for employees in either a Stakeholder or Alternative Qualifying Pension Scheme *, as well as the NHS Pension Scheme.

* with the exception of the Alternative Qualifying Pension Scheme with Pension Type set to Auto Enrol (Banded Earnings)

Stakeholder Pension Scheme

The screen displays the Pensionable Pay and contributions. The settings in this screen are display only to show which values are used in pensionable pay.

Alternative Qualifying Pension Scheme (based on Qualifying Earnings)

This screen displays the Pensionable Pay and pay elements that are used in the Pensionable Pay calculation where the Pension Type is Pensionable Earnings.

Now Pensions

A new option has been added to the **Setup/ Options | Practice Pension Details | Auto Enrolment Details | Pension Output File Details | Pension Output File Details** screen, **Add ER CODE to PAYROLL**, for Now Pensions. You can tick this box to include the ER CODE in the PAYROLLNO field.

Staging Date

Following changes by The Pensions Regulator (TPR), Staging Date will now be referred to as **Duty Start Date / Staging Date**. Duty Start Date will be used for Re-enrolment. This change will be visible in the following locations and on pension related warning messages:

- **Setup/ Options | Practice Pension Details | AE Configuration Tool**
- **Setup/ Options | Practice Pension Details | Auto Enrolment Details**

Declaration of Compliance Report

Reference to **Staging Date** on this report has been changed to **Duty Start Date / Staging Date** and **at Staging** has changed to **at Duty Start / Staging**.

OpenEnrol Letter L0

With effect from February 2018, **Letter L0 – Staging Date is coming** will no longer be required and, if you use IRIS OpenEnrol, prompts to create this letter have been removed. This is because final Staging Dates are in February 2018.

The **AE is coming** section and button has been removed from the **Automatic Enrolment Configuration Tool | Step 3 – Practice Pension Scheme Administrator Details**.

RTI

Full Payment Submission (FPS)

The FPS schema has been updated in line with legislative changes for Tax Year 2018/2019 and to include the new **Additional Payment indicator – Serious Ill Health Lump Sum**.

Earlier Year Update (EYU)

The EYU schema has been updated in line with legislative changes for Tax Year 2018/2019.

Serious Ill Health Lump Sum

A new tick box for payment type **Serious Ill Health Lump Sum** has been added to the **RTI Submissions | Earlier Year Update | Sundry Details | Flexible Drawdown details** section.

Employer Payment Summary (EPS)

The EPS schema has been updated in line with legislative changes for Tax Year 2018/2019.

App. Levy Allowance

Changes have been made to the software to allow you to overwrite the **App. Levy Allowance** field on the Employer Payment Summary screen. This field will need overwriting if the allowance is split between two practices in the PAYE Scheme. Once this field has been overwritten this will be used as the default value for future EPS submissions for the rest of the tax year.

The **App. Levy Allowance** field on the EPS will be disabled if the value set in **Setup/ Options | Tax/NI Parameters** is set to the maximum.

Other

National Living Wage/National Minimum Wage

Tax & NI Parameters

Setup/ Options | Tax & NI Parameters now includes the National Living Wage and National Minimum Wage rates. These can be viewed by clicking **View/Change Rates**. These rates can be amended but this should only be done if instructed to do so by HMRC.

From the **National Minimum and Living Wage Rates** screen you can **Add New Rates** or **Delete Rates**.

Add New Rates

The **Add New** button allows you to create a new National Minimum and Living Wage Rate. In the event you create a new rate, all fields must be completed. The date the new rates are effective from must be after the date for the final existing record. If you install an update, any rates you have set up with a date before or the same as the latest date on the installation will be removed.

Delete Rates

Delete Rates deletes the selected record. You can only delete records that you have created, rates set by an update (system parameters) cannot be deleted.

Warnings

Warnings have been added to **Employee Details** and the **Payroll Calculations** process to advise if employee's pay rate(s) to not meet the National Minimum Wage and National Living Wage rates. If required, you can disable these warnings in **Setup/ Options | Tax/NI Parameters** by unticking **Display minimum rate check messages**.

During **Payroll Calculations**, the system will detect any employees whose pay rates used in the period being calculated do not meet the minimum and you have the option to print a reporting showing these individuals.

National Minimum and Living Wage Report

We have added a new report to **Print Output | Monthly Summary and P32**. The new report, **National Minimum and Living Wage**, displays any employees where their rate of pay does not meet the National Minimum or National Living Wage. Checks will be made based on the employee's date of birth on the date the report is printed or within the next 30 days. For instance, printing the report on the 1st May will cover birthdays to 31st May.

Please Note: If the employee date of birth is not complete, the employee will not be checked or included in the report.

The report will display:

- Employee Name
- Date of Birth
- If Apprentice
- Age
- Current Hourly Rate £
- National Minimum & Living Wage Rates (applicable to the employee)

Trivial Commutation

Changes have been made to the software and the **Employee Details | Starter Details | Pensioner | Trivial Commutation Payment** fields will now always be enabled.

Import/Export

Following the introduction of GDPR, the facility to export employee data is now a requirement. We have therefore added an import/export function to the payroll software.

To cater for this, a new **Import/Export** button has been added to the main screen and the **Print Output** button has been renamed **Print Output/Export Data**.

Click the **Import/Export** button to open the new **Import/Export Data** screen. Here you can select from the following radio buttons:

- **IMPORT Data** – you can use the **IMPORT Data** screen to import data, such as employee information, into GP Payroll
- **EXPORT Data** – you can use the **EXPORT Data** screen to export data from GP Payroll

Import Data to GP Payroll

Selecting **Import Data** and clicking **OK** opens the **Import Data to GP Payroll** screen, containing three separate tabs:

- Select/Add Import File
- Import File Details
- Data Import Fields

Select/Add Import File

This tab lists existing import files, ***IRIS HR Import** is there as standard. Highlight the file you want to import and click **Import**. You can change a user defined import file by highlighting it (clicking on it) and selecting the relevant tab.

Import files will be listed in the following order:

- Any standard import structures, in alphabetical order (currently only ***IRIS HR Import**)
- Any user-defined import structures, in the order they were created

Add

Click **Add** to create a new user defined import structure, a message is displayed asking if you want to copy the current import structure.

- Click **Yes** to create an import structure with the fields in other tabs set as per the import structure being copied
- Click **No** to create a new import structure. The fields/options in the other tabs will be blank or as per the default for that field/option

Delete

Select a structure you want to remove and click **Delete**. Any files with * at the beginning are standard files and cannot be edited or deleted.

Import File Details

From this tab you can enter or browse to the location of the file you want to import and select the type of file being imported, for instance CSV or .xls.

Data Import Fields

From this tab you can specify the fields that are in the import file, in the order that they appear in the file. There are 3 columns on this tab:

- **Field Name** – drop-down of all the available fields for import into GP Payroll
- **ID** – this is for fields that can be imported more than once, for example NI values where an employee has had changes to NI Letters, Extra Payments and Deductions, Attachment Orders and Hourly Rates (where the employee has multiple posts)
- **Default Value** – this field can be edited by double clicking the row. A value entered here overrides any value in the import file, for that field, during the import process

And also, the following buttons:

- **Insert Row** – inserts a blank row above the row highlighted
- **Delete Row** – deletes the highlighted row
- **Format** – click this to display the **Import Data – Define Field Format** screen
- **Check** – click this to validate the entries in the **Data Import Fields** tab
- **Save** – click this to validate and save changes made

Please note: **Employee Number** field name must always be the first field in the import file and cannot be changed.

Import Data – Defined Field Format

This screen allows you to enter values used in the import file for the specified field. This allows the value being imported to be read and translated into the format expected by GP Payroll.

Import button

Saves/validates changes and begins the import process. Click **Yes** to the message to confirm you want to import. The following information will be displayed when the import is complete:

- New Records
- Fields Imported
- Fields Rejected
- Records Rejected
- Warnings

Any rejections/warnings can be viewed in the **Reject.TXT file**. Click **OK** on the **Import Data | Import Complete** message to view this information.

Cancel

Closes the **Import Data to GP Payroll** screen. If changes have been made, a message will be displayed asking if you want to save the changes.

Export Data from GP Payroll

Selecting **Export Data** and clicking **OK** opens the **Export Data from GP Payroll** screen, containing three separate tabs:

- Select/Add Export File
- Export File Details
- Data Export Fields

Select/Add Export File

This tab lists existing export files, ***IRIS HR Export** is there as standard. Highlight the file you want to export and click **Export**. You can change a user defined export file by highlighting it (clicking on it) and selecting the relevant tab.

Export files will be listed in the following order:

- Any standard export structures, in alphabetical order (currently only ***IRIS HR Export**)
- Any user-defined export structures, in the order they were created

Add

Click **Add** to create a new user defined export structure, a message is displayed asking if you want to copy the current export structure.

- Click **Yes** to create an export structure with the fields in other tabs set as per the export structure being copied
- Click **No** to create a new export structure. The fields/options in the other tabs will be blank or as per the default for that field/option

Delete

Select a structure you want to remove and click **Delete**. Any files with * at the beginning are standard files and cannot be edited or deleted.

Export File Details

From this tab you can enter or browse to the location you want the export file to be saved to, and select the type of file being exported, for instance CSV or .xls. From the **Employee Selection** section, you can choose if you want to export for **All employees** or a **Single** employee – here you choose from the dropdown list.

Data Export Fields

From this tab you can specify the fields that are in the export file, in the order that they appear in the file. There are 3 columns on this tab:

- **Field Name** – drop-down of all the available fields for export from GP Payroll
- **ID** – this is for fields that can be exported more than once, for example NI values where an employee has had changes to NI Letters, Extra Payments and Deductions, Attachment Orders and Hourly Rates (where the employee has multiple posts)
- **Default Value** – this field can be edited by double clicking the row. A value entered here overrides any value in the export file, for that field, during the export process

And also, the following buttons:

- **Insert Row** – inserts a blank row above the row highlighted
- **Delete Row** – deletes the highlighted row
- **Format** – click this to display the **Export Data – Define Field Format** screen
- **Check** – click this to validate the entries in the **Data Export Fields** tab
- **Save** – click this to validate and save changes made

Please note: **Employee Number** field name must always be the first field in the export file and cannot be changed.

Export Data – Defined Field Format

This screen allows you to enter values used in the export file for the specified field. This allows the value being exported to be read and translated into the format required.

Export button

Clicking **Export** begins the export process. Click **Yes** to the message to confirm you want to export. Checks will take place to ensure the export file name and location exist, the export file name is in the correct format, and the number of fields in the export file matches the number of fields in the selected export file structure.

Cancel

Closes the **Export Data from GP Payroll** screen and cancels the export process.

Apprenticeship Levy Values Report

The **Apprenticeship Levy Values report** will now show how the value is calculated per month.

Serious Ill Health Lump Sum

From Tax Year 2018/2019, we have added a tick box to **Employee Details | Pay Details | User Defined Additions**, called **Serious Ill Health Lump Sum**. This tick box is also accessible from **Payroll Calculations | Extra Payments** screen. This payment is not subject to NI.

This payment will be included in attachable earnings for attachment of earnings orders including:

- Child Support Agency (DEO)
- Child Support Agency (DEO) – New PEP
- Council Tax (England/Wales)
- Attachment of Earnings – all versions
- Earnings Arrestment (EA Scotland)
- Direct Earnings Attachment

Statutory Sick Pay Entitlement

SSP Entitlement will no longer be reset during the **End of Year | Transfer employee details into the next tax year** process.

KnowledgeBase

We have removed the **Search the KnowledgeBase** field from the Support hub in your product. Use this link to access the knowledgebase: <https://www.iris.co.uk/support/knowledgebase/>

Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider* and generate the necessary employee communications.

IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	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: 0344 815 5700	Tel: 0344 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0344 815 5671	payrollpro@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