

Scottish Widows - Pension File

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Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Scottish Widows output file. You can create an output file for output file to enrol workers and inform them of the contributions taken, in the one file.

The guide covers:

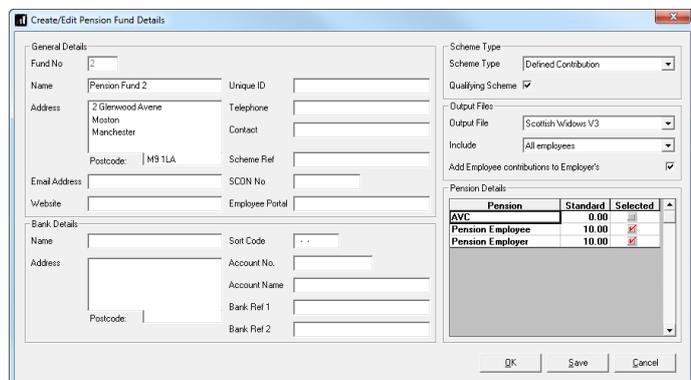
- Configuring output file information
- Creating an output file each period

Scottish Widows configuration

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

Pension Fund Configuration

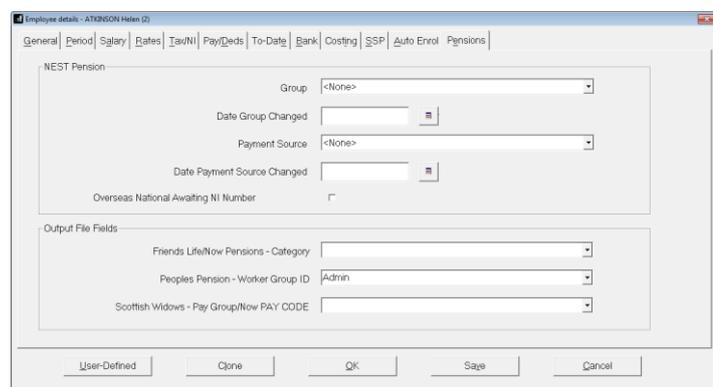
1. Go to the **Pension** menu and select '**Configure Pension Fund**'
2. Select the Scottish Widows pension fund and click '**Edit**'
3. On the **Create/Edit Pension Fund Details** screen, in the **Output File** field select '**Scottish Widows V3**'
4. In the **Include** field, select '**All employees**' (unless you have been told to use a different option by Scottish Widows)
5. Click '**OK**'



Pension	Standard	Selected
AVC	0.00	<input type="checkbox"/>
Pension Employee	10.00	<input checked="" type="checkbox"/>
Pension Employer	10.00	<input checked="" type="checkbox"/>

Employee Details Configuration

1. In **Employee Details**, select '**Pensions**' tab
2. In the **Scottish Widows – Pay Group/Now PAY Code** enter the Pay Group for each employee that is a member of the Scottish Widows scheme.



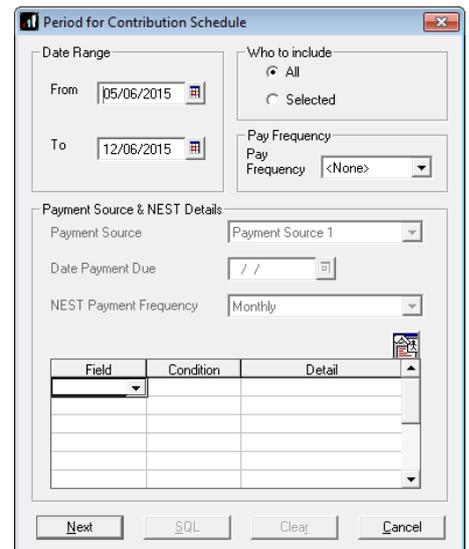
If the **Scottish Widows – Pay Group/Now PAY Code** doesn't contain any options, you can create a new one by typing directly in the field and then clicking '**Save**'. The new **Scottish Widows – Pay Group/Now PAY Code** option will be available to select in the dropdown field.

Scottish Widows file

You should send an output file to Scottish Widows each period you have paid your employees. This file will contain joiner and contribution information.

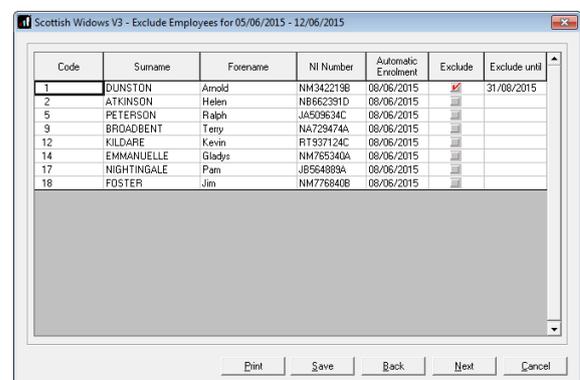
Create output file

1. Go to the **Pension** menu and select '**Create Pension File**'
2. On the **Select File to Create** screen, choose '**Scottish Widows V3**'
3. Click '**OK**'
4. On the **Period for Contribution Schedule** screen, enter the '**From**' and '**To**' dates for the date range to create the file.
5. In **Who to include**, leave the default setting as '**All**' unless you want to create the output file for a selection of employees
6. If your company has employees in different pay frequencies, for example weekly and monthly paid employees, select '**Pay Frequency**' to choose the payment frequency of employees you want to include in the output file (unless you have been told to include all employees in the output file, regardless of pay frequency)
7. Click '**Next**'



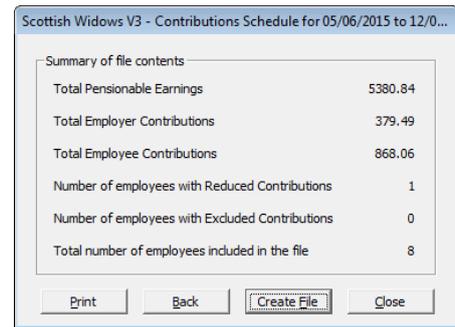
Your payroll has the ability to hold back contributions if the pension provider doesn't want to receive the funds until the end of the opt-out window. This is available when creating the pension output files. You must check with Scottish Widows if you are permitted this option.

8. Tick the '**Exclude**' box to exclude the worker from the contributions file. This will hold back the worker's contributions until the date entered in the **Exclude until** column
9. Click '**Next**'

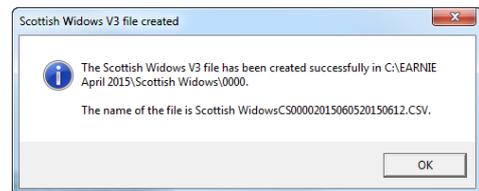


Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude until
1	DUNSTON	Arnold	NM342219B	08/06/2015	<input checked="" type="checkbox"/>	31/08/2015
2	ATKINSON	Helen	NB662391D	08/06/2015	<input type="checkbox"/>	
5	PETERSON	Ralph	J6508634C	08/06/2015	<input type="checkbox"/>	
9	BROADBENT	Terry	NA729474A	08/06/2015	<input type="checkbox"/>	
12	KILDAPE	Kevin	RT937124C	08/06/2015	<input type="checkbox"/>	
14	EMMANUELLE	Gladys	NM765340A	08/06/2015	<input type="checkbox"/>	
17	NIGHTINGALE	Pam	JB564889A	08/06/2015	<input type="checkbox"/>	
18	FOSTER	Jim	NM776840B	08/06/2015	<input type="checkbox"/>	

10. On the **Scottish Widows V3 – Contribution Schedule for...** screen, click **'Print'** to print a report of the employees that are included in the file
11. Click **'Create File'** to create the **Scottish Widows V3** file



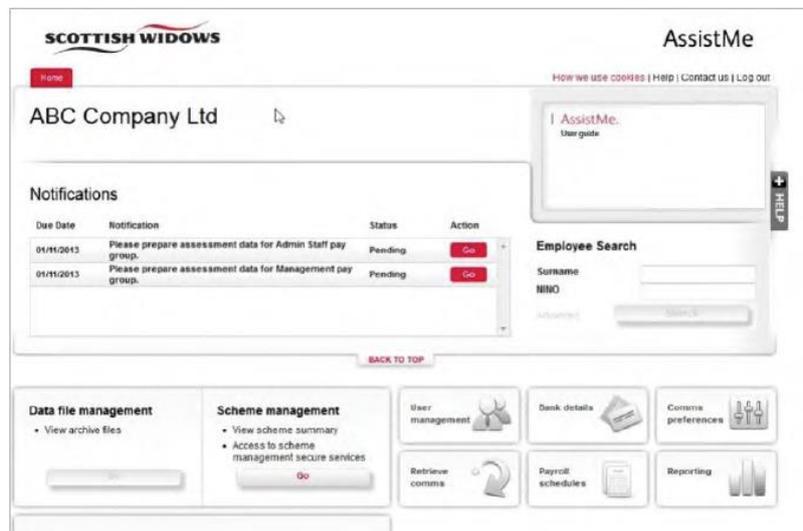
12. A message will advise the location where the **Scottish Widows V3** file has been created



Upload Scottish Widows V3 file:

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

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



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