

# Standard Life – Pension File Creation

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## Introduction

This guide will give you an overview of how to configure your payroll to include information required in Standard Life's output files. You can create output files for Standard Life to enrol workers and inform them of the contributions taken.

The guide covers:

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

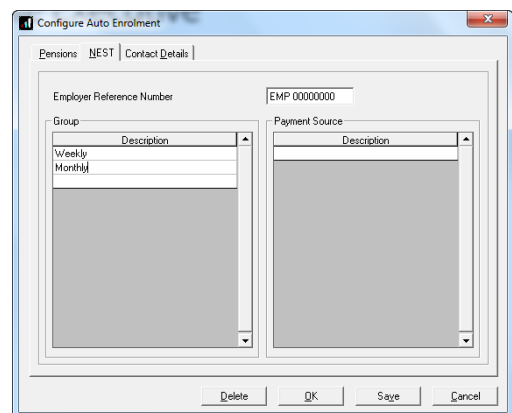
## Multiple Pay Frequency Configuration

You only need to complete the **Multiple Pay Frequency Configuration** if your company has more than one pay frequency, for example weekly paid employees and monthly paid employees. For companies that have multiple pay frequencies, Standard Life require a **Site Code** in the output file for each employee.

If you only have one pay frequency, for example all employees are paid monthly, you don't need to complete this configuration.

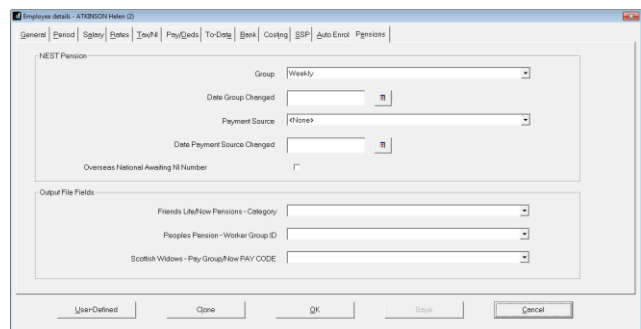
## Site Code configuration

1. Go to the **Pension** menu, select '**Configure Auto Enrolment**', and select the '**NEST**' tab
2. In the **Employer Reference Number** field, enter a dummy number such as '**EMP00000000**'
3. In the **Group** section, create your site codes by typing directly into the **Description** field, for example 'Weekly' and 'Monthly'
4. Click '**OK**'



## Employee Details configuration

1. Go to the **Employee** menu and choose '**Select Employee**'
2. Choose the employee and click '**OK**'
3. Select the '**Pensions**' tab
4. In the **Group** field, choose the appropriate Group for each employee that is a member of the Standard Life scheme

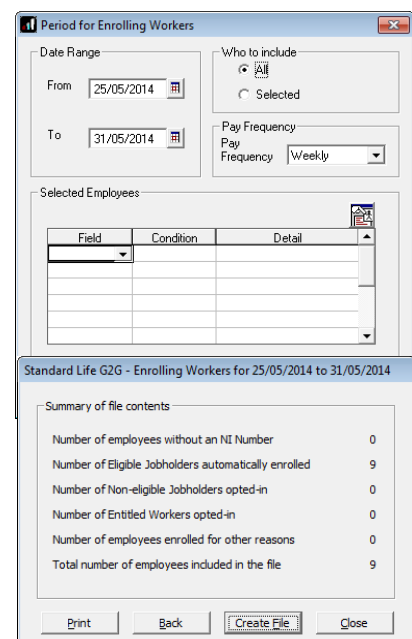


## Standard Life G2G – Joiners file

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

### Create Standard Life G2G Joiners file:

1. Go to the **Pension** menu and select '**Create Pension File**'
2. On the **Select File to Create** screen, choose '**Standard Life G2G Joiners**'
3. Click '**OK**'
4. On the **Period for Enrolling Workers** screen, enter the '**From**' and '**To**' dates for the date range to create the file.
5. In the **Who to include** section, accept the default of '**All**'
6. In the '**Pay Frequency**' field, to choose the payment frequency of employees you want to include in the output file
7. Click '**Next**'
8. On the **Standard Life G2G – Enrolling Workers for...**screen, click '**Print**' to print a report of the employees that are included in the file.
9. Click '**Create File**' to create the **Standard Life G2G Joiners** file



**Period for Enrolling Workers**

Date Range:  
 From: 25/05/2014  
 To: 31/05/2014

Who to include:  
 All  
 Selected

Pay Frequency:  
 Pay Frequency: Weekly

Selected Employees:

Field	Condition	Detail

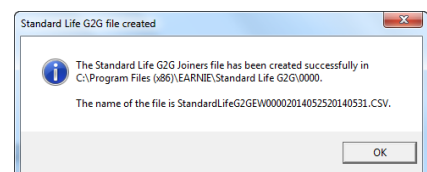
**Standard Life G2G - Enrolling Workers for 25/05/2014 to 31/05/2014**

Summary of file contents:

Number of employees without an NI Number	0
Number of Eligible Jobholders automatically enrolled	9
Number of Non-eligible Jobholders opted-in	0
Number of Entitled Workers opted-in	0
Number of employees enrolled for other reasons	0
Total number of employees included in the file	9

Buttons: Print, Back, Create File, Close

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

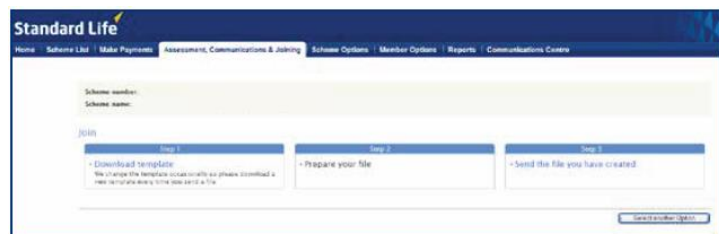


## Upload Standard Life G2G Joiners file:

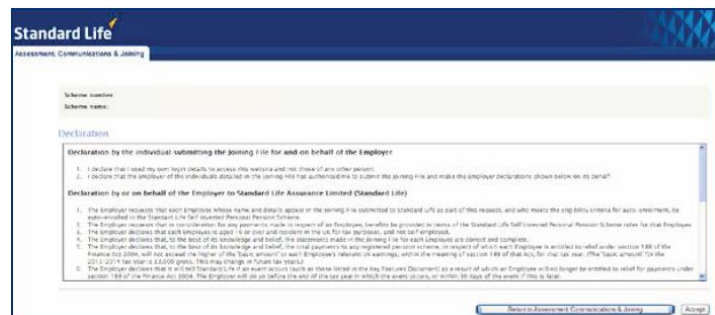
1. Login to your GPZ
2. On the **Home** page, select the '**Assessment, communications and joining**'
3. On the **Assessment, communications and joining** page, select the option '**Assessment, communications and joining**'
4. On the **Options** page, select '**Join**'



5. In the **Step 3** section, select '**Send the file you have created**'. There is no need to complete the other steps because your payroll has created the file for you



6. Read the **Declaration** on screen. When you're happy to continue, click the '**Accept**' button



7. On the **Select file** screen, click '**Browse**' and go to the location where your payroll created the **Standard Life G2G Joiners** output file. When you have selected the file, click '**Send file**'



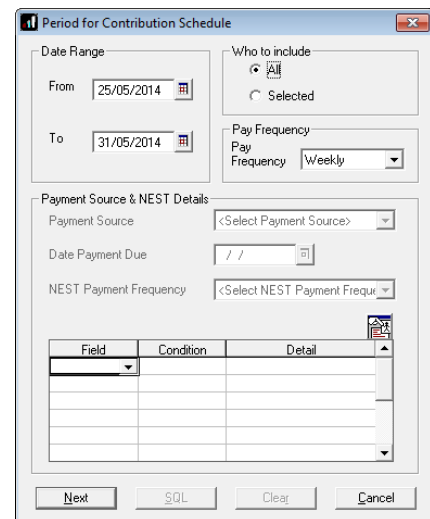
Click [here](#) for more help from Standard Life.

## Standard Life G2G – Payments file

You should send a Payments file to Standard Life each period you have paid your employees.

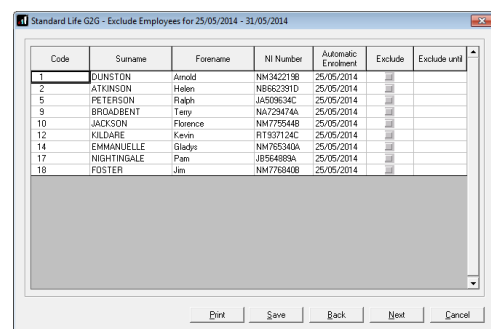
### Create Standard Life G2G Payments file:

1. Go to the **Pension** menu and select '**Create Pension File**'
2. On the **Select File to Create** screen, choose '**Standard Life G2G Payments**'
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 the **Who to include** section, accept the default of '**All**'
6. In the **Pay Frequency** field, choose the payment frequency of employees you want to include in the output file
7. Click '**Next**'



Your payroll has the ability to hold back contributions as per the Pensions Regulator's advice. However, Standard Life said they prefer this option isn't used.

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

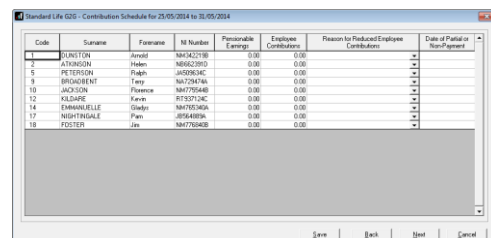


Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude until
1	DUNSTON	Arnold	NM3422198	25/05/2014	<input type="checkbox"/>	
2	ATKINSON	Helen	NB562501D	25/05/2014	<input type="checkbox"/>	
5	PETERSON	Ralph	J4509634C	25/05/2014	<input type="checkbox"/>	
9	BROADBENT	Terry	NA729474A	25/05/2014	<input type="checkbox"/>	
10	JACKSON	Florence	NM779544B	25/05/2014	<input type="checkbox"/>	
12	KILDARE	Neville	RT1937134C	25/05/2014	<input type="checkbox"/>	
14	EMMANUELLE	Gladys	NM785340A	25/05/2014	<input type="checkbox"/>	
17	NIGHTINGALE	Pam	JB564883A	25/05/2014	<input type="checkbox"/>	
18	FOSTER	Jen	NM778940B	25/05/2014	<input type="checkbox"/>	

10. You must inform Standard Life of any employees that didn't have a pension contribution taken or made a reduced contribution.

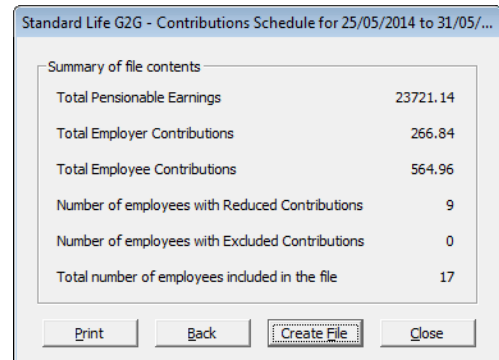
You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.

11. Click '**Next**'

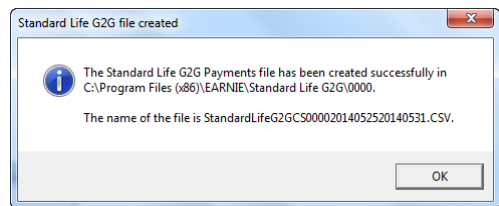


Code	Surname	Forename	NI Number	Personalable (Lenny)	Employee Contributions	Reason for Reduced Employee Contributions	Date of Payment
1	DUNSTON	Arnold	NM3422198	0.00	0.00		
2	ATKINSON	Helen	NB562501D	0.00	0.00		
5	PETERSON	Ralph	J4509634C	0.00	0.00		
9	BROADBENT	Terry	NA729474A	0.00	0.00		
10	JACKSON	Florence	NM779544B	0.00	0.00		
12	KILDARE	Neville	RT1937134C	0.00	0.00		
14	EMMANUELLE	Gladys	NM785340A	0.00	0.00		
17	NIGHTINGALE	Pam	JB564883A	0.00	0.00		
18	FOSTER	Jen	NM778940B	0.00	0.00		

12. On the **Standard Life G2G – Contribution Schedule for...** screen, click **'Print'** to print a report of the employees that are included in the file.
13. Click **'Create File'** to create the **Standard Life G2G – Contribution Schedule** file

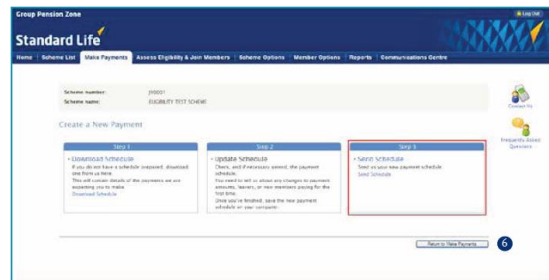


14. A message will advise the location where the **Standard Life G2G Payments** file has been created

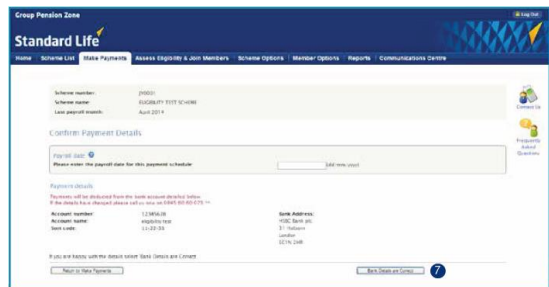


### Upload Standard Life G2G Payments file:

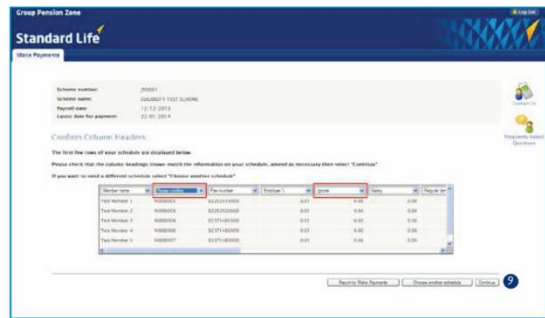
1. Login to your GPZ
2. On the **Home** page, select the **'Make Payments'**
3. In the **Step 3** section, select **'Send Schedule'**. There is no need to complete the other steps because your payroll has created the file for you



4. On the **Confirm Payment Details** screen, enter the pay period's **Payroll Date** for the file you're sending to Standard Life.
5. Check the displayed bank details are correct. If you are happy with the details, click **'Bank Details are Correct'**
6. Browse to the location where your payroll created the **Standard Life G2G Payments** output file. When you have selected the file, click **'Send Schedule'**



- On the **Confirm Column Headers** screen, check the column headers match the file you want to upload and the click '**Continue**'



Click [here](#) for more help from Standard Life.