



Payroll Professional

Release Notes EOY 2023

March 2023

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Important Information

Central databases

This update requires the central databases called P2Admin and T2Data to be structurally updated, we therefore recommend that you back up these files before installing the update. The location of where these files are located is shown under Help\Paths and Files.

If you are using Microsoft Access versions of these files, we would recommend running Compact and Repair or an Upsize using the Maintenance Wizard, before installing the update. The maintenance wizard is in your Program Directory shown under Help\Paths and Files, details of how to use this facility are under the online help file.

The updating of these files may show up existing corruptions, which is why we recommend backing them up before installing the update.

Configuration file called Star.Payroll.GUI.exe.Config

This configuration file is found under the Program Directory shown under Help\Paths and Files, this is on each workstation running IPP.

As part of the update, this file has been updated and will replace your existing file, if you have any custom settings you will need to back up the existing file before installing the update. These custom settings include:

- Specific setting for Access drivers
- Specific settings for SQL drivers
- vPA settings
- Or any other custom settings

After installing the update edit the new configuration file in Notepad and copy any custom settings from your old configuration file to the new configuration file.

.Net Framework

Before installing this update, you will need to ensure that on each workstation running IPP that .Net Framework version 4.8 is installed. This is available from the Microsoft website.

Bureau Management System

If you are using a short cut on your desktop to access BMS, you will need to change the short cut to point to the new file called **Star.Payroll.BMS.Manager.exe** found within your **Program Directory** shown under **Help\Paths and Files**.

Statutory Rate Changes 2022/23

Benefits in Kind

Van Rates

Annual van charge	Annual fuel charge	Zero emission reduction
£3600.00	£688.00	100%

Mileage Rates

Vehicle type	Mileage threshold	Higher rate	Lower rate	Passenger rate
Car or Van	10,000	£0.45	£0.25	£0.05
Motorbike			£0.24	
Bicycle			£0.20	

Miscellaneous

Benefit Type	Description	Value
Loans	Actual interest rate	2%
	Average interest rate	2%
	Combined outstanding exemption	£10,000.00
Accommodation	Actual interest rate	2%
	Accommodation limit	£75,000.00
Relocation	Qualifying costs exemption	£8,000.00
Cars	Capital contributions maximum	£5,000.00
	Car accessories minimum	£100.00
Incidental overnight expenses	Overnight expense exemption (UK)	£5.00
	Overnight expense exemption (abroad)	£10.00
Class 1A	P11D Class 1A NICs	14.53%

Statutory Rate Changes 2023/24

Tax Codes

The emergency tax code from 6th April 2023 is 1257L.

When you close the Tax Year 2022/23, there are no tax code uplifts.

Tax Bands

UK Rates

Rate	Bandwidth
20%	1 – 37,700
40%	37,701 – 125,140
45%	Over 125,140

Scottish Rates

Rate	Bandwidths
19%	1 – 2,162
20%	2,163 – 13,118
21%	13,119 – 31,092
42%	31,093 – 125,140
47%	Over 125,140

Welsh Rates

Rate	Bandwidths
20%	1 – 37,700
40%	37,701 – 125,140
45%	Over 125,140

National Insurance Letters

NI Letter	Description
A	Normal, age 21 to under state pension age
B	Reduced, females only, age 21 to under state pension age
C	Over state pension age
F	Normal, working in a freeport, age 21 to under state pension age
H	Apprentice, age 16 to under 25
I	Reduced, females only, working in a freeport, age 21 to under state pension age
J	Deferral, age 21 to under state pension age
L	Deferral, working in a freeport, age 21 to under state pension age
M	Normal, age 16 to under 21
S	Over state pension age, working in a freeport
V	Veteran, within 12 months of their first civilian employment date, age 21 to under state pension age
X	No NI
Z	Deferral, age 16 to under 21

National Insurance Bands and Contributions

Bands	Weekly	Monthly	Yearly
To LEL	123	533	6396
To SET	175	758	9100
To PET	242	1048	12570
To FUST	481	2083	25000
To UST	967	4189	50270
To AUST	967	4189	50270
To VUST	967	4189	50270
To UEL	967	4189	50270

Employee NI % Rates												
	A	B	C	F	H	I	J	L	M	S	V	Z
To LEL	0	0	0	0	0	0	0	0	0	0	0	0
To SET	0	0	0	0	0	0	0	0	0	0	0	0
To PET	0	0	0	0	0	0	0	0	0	0	0	0
To FUST	12	5.85	0	12	12	5.85	2	2	12	0	12	2
To UST	12	5.85	0	12	12	5.85	2	2	12	0	12	2
To AUST	12	5.85	0	12	12	5.85	2	2	12	0	12	2
To VUST	12	5.85	0	12	12	5.85	2	2	12	0	12	2
To UEL	12	5.85	0	12	12	5.85	2	2	12	0	12	2
Above UEL	2	2	0	2	2	2	2	2	2	0	2	2

Employer NI % Rates												
	A	B	C	F	H	I	J	L	M	S	V	Z
To LEL	0	0	0	0	0	0	0	0	0	0	0	0
To SET	0	0	0	0	0	0	0	0	0	0	0	0
To PET	13.8	13.8	13.8	0	0	0	13.8	0	0	0	0	0
To FUST	13.8	13.8	13.8	0	0	0	13.8	0	0	0	0	0
To UST	13.8	13.8	13.8	13.8	0	13.8	13.8	13.8	0	13.8	0	0
To AUST	13.8	13.8	13.8	13.8	0	13.8	13.8	13.8	13.8	13.8	0	13.8
To VUST	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	0	13.8
To UEL	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8
Above UEL	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8	13.8

Statutory Absence Rates

Type	Rate
Sick Pay	109.40
Maternity Pay	172.48
Adoption Pay	172.48
Paternity Pay Adoption	172.48
Paternity Pay Birth	172.48
Shared Paternity Pay Adoption	172.48
Shared Paternity Pay Birth	172.48
Parental Bereavement Pay	172.48

Student Loan

Plan	Annual Threshold	Rate
Plan 1	£22,015.00	9%
Plan 2	£27,295.00	9%
Plan 4	£27,660.00	9%
Postgraduate	£21,000.00	6%

Class 1A NICs

For Termination and Sporting payments, the rate is 13.80%.

Employment Allowance

The annual Employment Allowance is £5,000.00.

Apprenticeship Levy

The annual Apprenticeship Levy allowance is £15,000 and the rate is 0.5%.

Pension Reform

These bands were released in January 2023, same rates as last tax year.

Frequency	Qualifying Earnings Lower	Auto Enrolment Trigger	Qualifying Earnings Upper
Weekly	120	192	967
Fortnightly	240	384	1934
Four Weekly	480	768	3867
Monthly	520	833	4189
Quarterly	1560	2499	12568
Half Yearly	3120	4998	25135
Yearly	6240	10000	50270

Benefits in Kind

Car CO2 Emissions

Emission from	Emission to	Pre April 2020 Standard (A)	Pre April 2020 Diesel RDE2 (F)	Pre April 2020 Diesel Additional (D)	From April 2020 Standard (A)	From April 2020 Diesel RDE2 (F)	From April 2020 Diesel Additional (D)
0	0	2	2	4	2	2	4
1	50	14	14	4	14	14	4
51	54	15	15	4	15	15	4
55	59	16	16	4	16	16	4
60	64	17	17	4	17	17	4
65	69	18	18	4	18	18	4
70	74	19	19	4	19	19	4
75	79	20	20	4	20	20	4
80	84	21	21	4	21	21	4
85	89	22	22	4	22	22	4
90	94	23	23	4	23	23	4
95	99	24	24	4	24	24	4
100	104	25	25	4	25	25	4
105	109	26	26	4	26	26	4
110	114	27	27	4	27	27	4
115	119	28	28	4	28	28	4
120	124	29	29	4	29	29	4
125	129	30	30	4	30	30	4
130	134	31	31	4	31	31	4
135	139	32	32	4	32	32	4
140	144	33	33	4	33	33	4
145	149	34	34	3	34	34	3

Emission from	Emission to	Pre April 2020 Standard (A)	Pre April 2020 Diesel RDE2 (F)	Pre April 2020 Diesel Additional (D)	From April 2020 Standard (A)	From April 2020 Diesel RDE2 (F)	From April 2020 Diesel Additional (D)
150	154	35	35	2	35	35	2
155	159	36	36	1	36	36	1
160	164	37	37	0	37	37	0
165	169	37	37	0	37	37	0
170	174	37	37	0	37	37	0
175	9999	37	37	0	37	37	0

Electric Mileage Range

Mileage from	Mileage to	Pre April 2020 Standard (A)	Pre April 2020 Diesel RDE2 (F)	Pre April 2020 Diesel Additional (D)	From April 2020 Standard (A)	From April 2020 Diesel RDE2 (F)	From April 2020 Diesel Additional (D)
0	29	14	14	4	14	14	4
30	39	12	12	4	12	12	4
40	69	8	8	4	8	8	4
70	129	5	5	4	5	5	4
130	9999	2	2	4	2	2	4

Car Fuel Scale

Engine size from	Engine size to	Registered before 1998	Registered from 1998	Diesel registered from 1998	Annual fuel charge
0	1400	24	24	28	27800
1401	2000	35	35	37	27800
2001	9999	37	37	37	27800

Scottish Attachment of Earnings Order

New rates have been introduced for orders dated 6th April 2023 or later, these affect SEA, SCMA and SCAO:

The new rates are shown in the program under **Tables\AEOs** when you highlight the appropriate order type:

AEO Tables

Quick Report Print Form Done

AEO Type

- CCAEO
- CTAEO
- DEA
- DEA HIGHER
- DEO/CMS
- DEO/CSA
- FAEO
- FPAEO
- ISDN
- JAE0
- MAEO
- NP AEO
- PAEO
- SCAO**
- SCMA
- SEA
- WCTAEO

Tables Misc

Issued

06 Apr 2023

Frequency

Monthly

Lower Earm	Upper Earning	Is % Base	Fixed Deductio	Percentage	Excess %	Is Fixed +	Is Fixed Or
0.00	655.83		0.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
655.83	2,370.49		15.00	0.00	19.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2,370.49	3,563.83		325.79	0.00	23.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3,563.83	10,000,000.00		600.25	0.00	50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Frequency

Weekly

Lower Earm	Upper Earning	Is % Base	Fixed Deductio	Percentage	Excess %	Is Fixed +	Is Fixed Or
0.00	150.94		0.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
150.94	545.57		4.00	0.00	19.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
545.57	820.21		74.98	0.00	23.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
820.21	10,000,000.00		138.15	0.00	50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Issued

- 06 Apr 2022
- 06 Apr 2019
- 06 Apr 2016
- 06 Apr 2013

AEO Tables

Quick Report Print Form Done

AEO Type

- CCAEO
- CTAEO
- DEA
- DEA HIGHER
- DEO/CMS
- DEO/CSA
- FAEO
- FPAEO
- ISDN
- JAE0
- MAEO
- NP AEO
- PAEO
- SCAO
- SCMA**
- SEA
- WCTAEO

Tables Misc

Miscellaneous Details

Countries : Scotland

Admin charge : from year : 2006 rate : 1.00

Issued

Issued	Rate
06 Apr 2023	21.56
06 Apr 2022	18.63
06 Apr 2019	17.42
06 Apr 2016	16.24
06 Apr 2013	15.12
06 Apr 2010	13.64
05 Apr 2006	12.00
03 Dec 2001	10.00
30 Nov 1995	9.00
01 Apr 1971	5.00

AEO Tables

Quick Report Print Form Done

AEO Type

- CCAEO
- CTAEO
- DEA
- DEA HIGHER
- DEO/CMS
- DEO/CSA
- FAEO
- FPAEO
- ISDN
- JAE0
- MAEO
- NP AEO
- PAEO
- SCAO
- SCMA
- SEA**
- WCTAEO

Tables Misc

Issued

06 Apr 2023

Frequency

Monthly

Lower Earm	Upper Earning	Is % Base	Fixed Deductio	Percentage	Excess %	Is Fixed +	Is Fixed Or
0.00	655.83		0.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
655.83	2,370.49		15.00	0.00	19.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
2,370.49	3,563.83		325.79	0.00	23.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3,563.83	10,000,000.00		600.25	0.00	50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Frequency

Weekly

Lower Earm	Upper Earning	Is % Base	Fixed Deductio	Percentage	Excess %	Is Fixed +	Is Fixed Or
0.00	150.94		0.00	0.00	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
150.94	545.57		4.00	0.00	19.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
545.57	820.21		74.98	0.00	23.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
820.21	10,000,000.00		138.15	0.00	50.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Issued

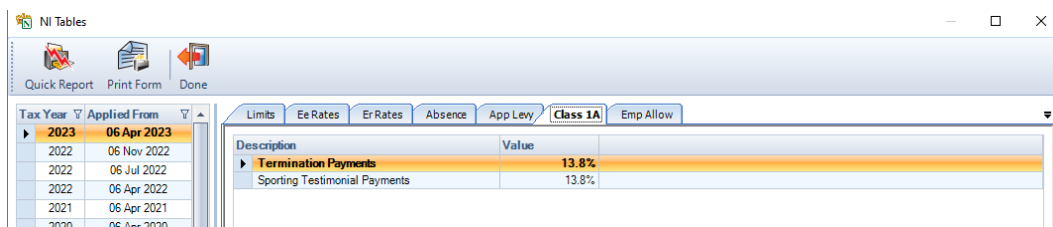
- 06 Apr 2022
- 06 Apr 2019
- 06 Apr 2016
- 06 Apr 2013

Statutory Program Changes

Tables – Class 1A

The Class 1A rate for Termination and Sporting Payments, and P11D calculations have been separated as they are different for tax year 2022/23.

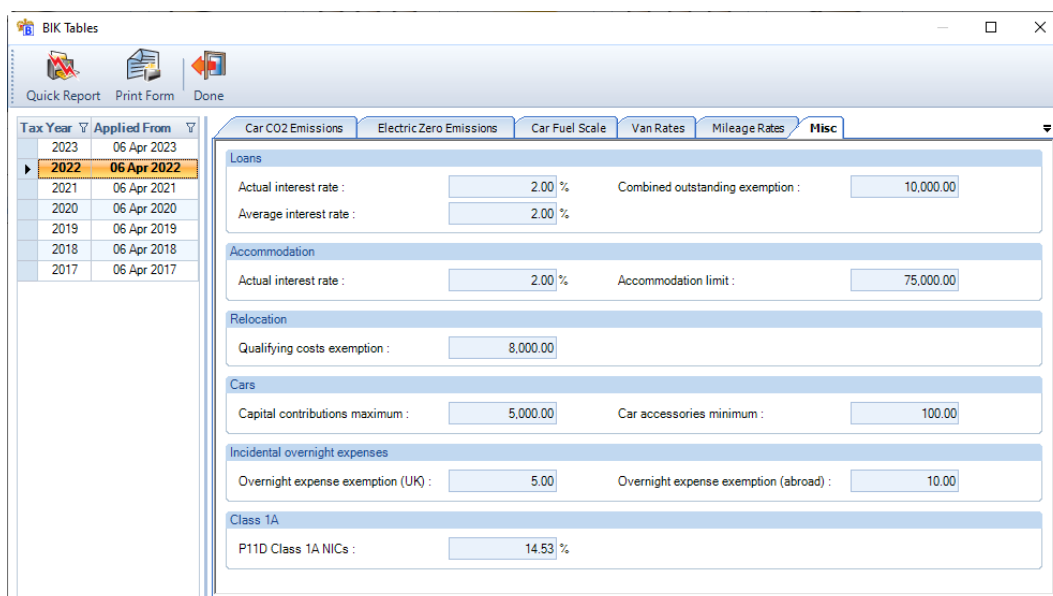
You will see that under Tables\National Insurance the Class 1A tab shows the rates specifically for Termination and Sporting payments:



The screenshot shows the 'NI Tables' application window. The 'Class 1A' tab is selected, displaying a table with the following data:

Description	Value
Termination Payments	13.8%
Sporting Testimonial Payments	13.8%

Under Tables\Benefits In Kind the Misc tab shows the Class 1A Rate for P11D calculations:



The screenshot shows the 'BIK Tables' application window. The 'Misc' tab is selected, displaying various fields for P11D calculations. The 'Class 1A' section shows:

Field	Value
P11D Class 1A NICs	14.53%

Closing the tax year

2022/23 – Deferment NI Letters

When closing the tax year 2022/23 the Deferment NI Letters tab will include employees where their NI Letter is L, in addition to the NI Letters J and Z.

P60's

For tax year 2022/23, there are no changes apart from the tax year.

P60 Approval

For tax year 2022/23, the HMRC have removed the requirement for approval this year, we have ensured the substitute forms meet the HMRC's specification RD1 P60 guidance, for the following:

- Report PAP60P22\PSP60P22
- Portal eP60s

HR P60 Export

This facility has been updated to export the P60 information for tax year 2022/23.

Standard Report Changes

Report	Status	Type	Description
PAEP6023\PSEP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAKP6023\PSKP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAMP6023\PSMP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP14P23\PSP14P23	New	Year End	New P60 report for 2022/23.
PAP60H23\PSP60H23	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP60P23\PSP60P23	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP60ER\PSP60ER	Amended	Year End	Updated for 2022/23 onwards, PT to UEL value will include the NI Bands To FUST and To VUST.

Real Time Information

NINO Verification Request

There are no changes to the schema this year.

DPS Notifications

Standard

There are no changes to these downloads for tax year 2022/23.

CIS

There are no changes to the existing downloads for CIS notifications.

Employer Payment Summary

There is a new schema in place for tax year 2023/24.

There are no changes to the fields included in the submission.

Full Payment Submission

As usual, there is a new schema in place for tax year 2023/24.

There are no changes to the fields included in the submission.

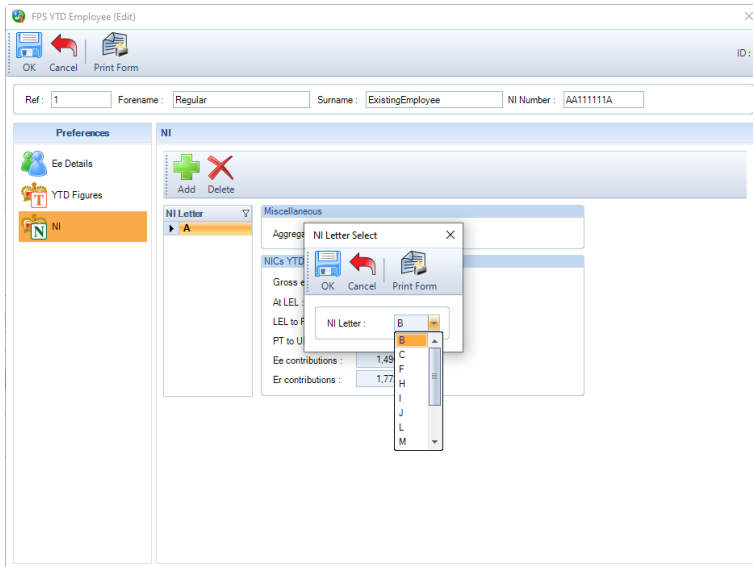
RTI Log

There are no changes to this facility.

Full Payment Submission Year To Date

A new schema has been added for tax year 2022/23.

When creating an FPS YTD submission for tax year 2022/23, you can add NI Letters F, I, S, L and V for an employee:



Additional validation is performed via the HMRC Submission Validation checker for these NI Letters based on the employees Date of Birth, Gender, Start Date and Veterans first civilian employment when the FPS YTD submission is created.

P11D Module

In this release you can close the P11D year 2021/22, and process P11Ds for year 2022/23 including online submissions.

P11D Car Import

You can now import the **Registration date** as 1st September 2017 or later when the fuel type is selected as Diesel RDE2.

The **Available to** date is now validated to ensure that it is on or before the end of the current P11D year.

P11D Submissions

New schema is in place for P11D year 2022/23.

Validations

HMRC has requested the following validations are included in our software.

Validation has been added to ensure you can only create a P11D submission for the current P11D year, as HMRC only allow the current P11D year to be submitted not previous P11D years.

The P11D only and the P11D/P11Db submission forms have validation added to ensure the figures add up correctly when they have been manually entered:

The **Total benefits on which Class 1A NICs are due** must be the total of **Total Benefits liable to Class 1A NICs** plus **Add any amounts** less **Deduct any amounts**.

The **Class 1A NICs payable by 19th July** must be the **Total benefits on which Class 1A NICs are due** multiplied by the **Class 1A NICs rate**.

Additional validation has also been added to ensure the Class 1A NICs rate is included in the P11D submission.

P11D Reports

Report	Status	Type	Description
PAP11D\PSP11D	Amended	P11D	HMRC Approved P11D for P11D year 2022/23. Only includes calculated records.
PAP11D22\PSP11D22	Renamed	P11D	HMRC Approved P11D for P11D year 2021/22. To be produced for P11D year 2021/22 only.
PAP11DB\PSP11DB	Amended	P11D	HMRC Approved P11DB for P11D year 2022/23. Return address included.
PAC1ABD\PSC1ABD	Amended	P11D Benefits	Class 1A NICs rate

Report	Status	Type	Description
PASCHREL\PSSCHREL	Amended	P11D	Text has been changed from Previous years excess to Previous years balance

Program Changes

Auto Enrolment Dashboard

The Pre Assessment option has been removed from the Auto Enrolment Dashboard, this facility allowed you to assess employees and the pension contributions before the Employers Staging date.

End of Year Checker

With a payroll open in tax year 2022/23, the EOY Validation Checker under the Utilities tab is now enabled and has been updated for tax year 2022/23.

Query Manager – Wizard

New query wizard

Step 1 - Select the report type required.

Please select the section which is the core of the information you require. Note: the availability of certain items of information will depend on the report type selected.

Report Type

Ee Current Run Pay Comps
Ee Details
Ee NIC Run Balances
Ee NIC YTD Balances
Ee Pension Details
Ee Pension History
Ee Permanent Pay Comp
Ee Prev Runs Pay Comps
Ee Run Balances
Ee YTD Balances

< Back Next > Cancel

Fields have been added to the Report Types, so that they can be included in the query, as follows:

Report Type – Ee Details

- Working in a Freeport
- Veterans First Civilian Employment

Report Type – Ee NIC Run Balances

- Earnings to FUST

- Earnings to VUST

Report Type – Ee Run Balances

- Working in a Freeport
- Veterans First Civilian Employment

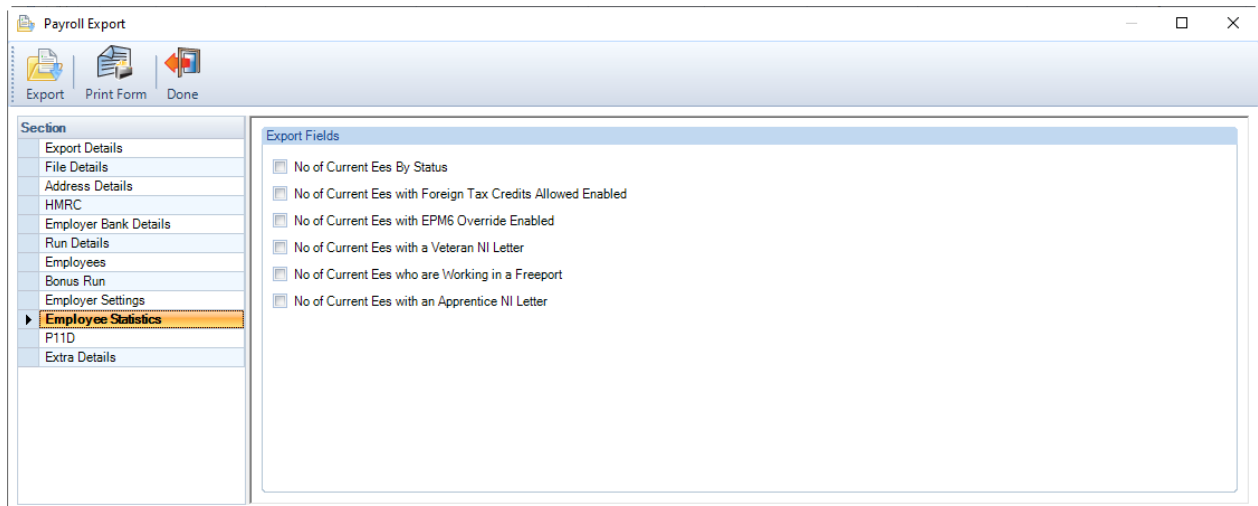
Report Type – Ee YTD Balances

- Working in a Freeport
- Veterans First Civilian Employment

Export Payroll List

The following have been added to the **Employee Statistics** section of the Export Payroll List:

- **No of Current Ees with a Veterans NI Letter** – these are current employees with NI Letter as V set under Employee Details\NI tab
- **No of Current Ees who are Working in a Freeport** – these are current employees with Working in a Freeport ticked under Employee Details\NI tab
- **No of Current Ees with an Apprentice NI Letter** – these are current employees with NI Letter as H set under Employee Details\NI tab



When these columns are selected and exported, all data files will be searched, and the number of employees shown under the relevant column headers:

- No Current Veterans NI Letter
- No Current Working in a Freeport
- No Current Apprentice NI Letter

P11D Module

P11D Employee List

The list of P11D employees has been updated to exclude payroll employees with a Start date after the end of the current P11D year.

Employee Verification Connector (EVC) for Experian Work Report

You have been sent communication from IRIS regarding the EVC facility to support Experian Work Report.

By default, a Client is Opted in, and employee information is uploaded to EVC after a successful Full Payment Submission and Full Payment Submission Alignment. If required, clients can be opted out.

EVC Dashboard

The **EVC Dashboard** under the **Utilities** menu gives you the ability to opt a Client out from EVC, and if they previously opted out you can opt them back in to EVC.

When you opt a Client out from EVC all employees data that has been uploaded is deleted.

Prerequisites

To be able to opt a client out or in to EVC the payroll data file must be up to date i.e. has been opened in the latest version of IPP.

For the opt in/opt out request and for any information submitted to the EVC platform, the IRIS domain `api.iris.co.uk` will be used. This domain will need to be permitted via your firewall by your IT team.

If a payroll data file has a Microsoft Access password set, you must ensure that it has been opened in IPP and the password entered before you are able to perform the opt in/out process, otherwise when the opt in/out process is performed it will be unsuccessful.

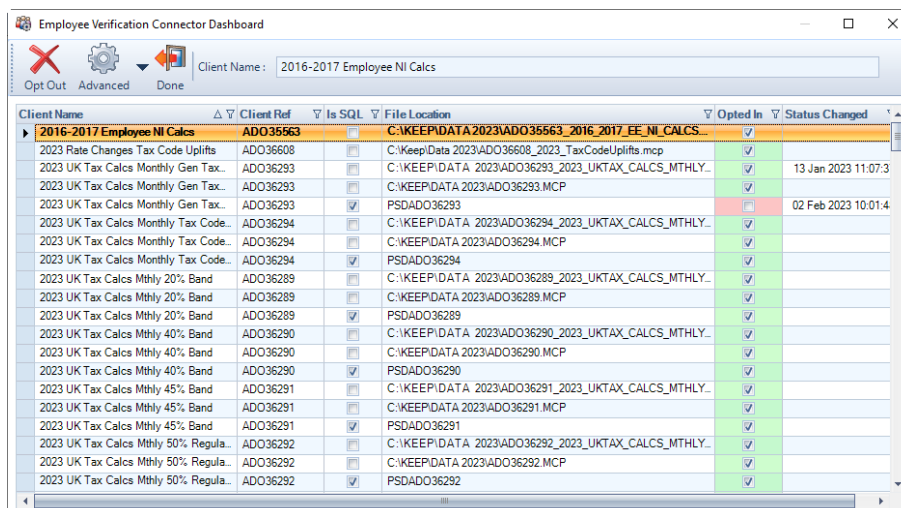
When using the individual client **opt in/opt out** functionality under the **EVC Dashboard**, if the payroll data file requires a password to open in IPP (either access to the payroll set up in IPP under Data\Passwords\Access to Payroll, or a SQL database password), you will be prompted to enter the password to perform the opt in/out process successfully.

You are not able to use the **Bulk opt in/opt out** facility under **EVC Dashboard\Advanced** for any payroll data file that requires a password to be entered to be able to open them in IPP (either access to the payroll set up in IPP under Data\Passwords\Access to Payroll, or SQL database password).

How to opt a Client out from EVC

Go to **Utilities** tab and select **Dashboard** within the **EVC** section.

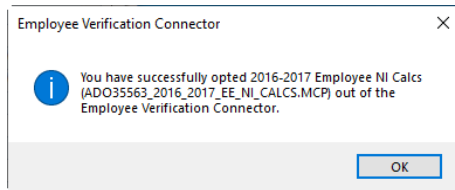
If you have a payroll data file open, you will be prompted to close it before the following screen will appear:



The screenshot shows the 'Employee Verification Connector Dashboard' window. At the top, there are buttons for 'Opt Out', 'Advanced', and 'Done'. A 'Client Name' field contains '2016-2017 Employee NI Calcs'. Below this is a table with columns: Client Name, Client Ref, Is SQL, File Location, Opted In, and Status Changed. The table lists various payroll data files for the client '2016-2017 Employee NI Calcs' (Client Ref: ADO35563). The files include Rate Changes Tax Code Uplifts, UK Tax Calcs Monthly Gen Tax, and UK Tax Calcs Monthly Tax Code for different tax bands (20%, 40%, 45%, 50% Regula.). The 'Opted In' column shows checkmarks for all entries, and the 'Status Changed' column shows dates for some entries.

Client Name	Client Ref	Is SQL	File Location	Opted In	Status Changed
2016-2017 Employee NI Calcs	ADO35563		C:\KEEP\DATA\2023\ADO35563_2016_2017_EE_NI_CALCS...	✓	
2023 Rate Changes Tax Code Uplifts	ADO36608		C:\Keep\Data\2023\ADO36608_2023_TaxCodeUplifts.mcp	✓	
2023 UK Tax Calcs Monthly Gen Tax...	ADO36293		C:\KEEP\DATA\2023\ADO36293_2023_UKTAX_CALCS_MTHLY...	✓	13 Jan 2023 11:07:3
2023 UK Tax Calcs Monthly Gen Tax...	ADO36293		C:\KEEP\DATA\2023\ADO36293.MCP	✓	
2023 UK Tax Calcs Monthly Gen Tax...	ADO36293	✓	PSDADO36293	✓	02 Feb 2023 10:01:4
2023 UK Tax Calcs Monthly Tax Code...	ADO36294		C:\KEEP\DATA\2023\ADO36294_2023_UKTAX_CALCS_MTHLY...	✓	
2023 UK Tax Calcs Monthly Tax Code...	ADO36294		C:\KEEP\DATA\2023\ADO36294.MCP	✓	
2023 UK Tax Calcs Monthly Tax Code...	ADO36294	✓	PSDADO36294	✓	
2023 UK Tax Calcs Mthly 20% Band	ADO36289		C:\KEEP\DATA\2023\ADO36289_2023_UKTAX_CALCS_MTHLY...	✓	
2023 UK Tax Calcs Mthly 20% Band	ADO36289		C:\KEEP\DATA\2023\ADO36289.MCP	✓	
2023 UK Tax Calcs Mthly 20% Band	ADO36289	✓	PSDADO36289	✓	
2023 UK Tax Calcs Mthly 40% Band	ADO36290		C:\KEEP\DATA\2023\ADO36290_2023_UKTAX_CALCS_MTHLY...	✓	
2023 UK Tax Calcs Mthly 40% Band	ADO36290		C:\KEEP\DATA\2023\ADO36290.MCP	✓	
2023 UK Tax Calcs Mthly 40% Band	ADO36290	✓	PSDADO36290	✓	
2023 UK Tax Calcs Mthly 45% Band	ADO36291		C:\KEEP\DATA\2023\ADO36291_2023_UKTAX_CALCS_MTHLY...	✓	
2023 UK Tax Calcs Mthly 45% Band	ADO36291		C:\KEEP\DATA\2023\ADO36291.MCP	✓	
2023 UK Tax Calcs Mthly 45% Band	ADO36291	✓	PSDADO36291	✓	
2023 UK Tax Calcs Mthly 50% Regula...	ADO36292		C:\KEEP\DATA\2023\ADO36292_2023_UKTAX_CALCS_MTHLY...	✓	
2023 UK Tax Calcs Mthly 50% Regula...	ADO36292		C:\KEEP\DATA\2023\ADO36292.MCP	✓	
2023 UK Tax Calcs Mthly 50% Regula...	ADO36292	✓	PSDADO36292	✓	

Highlight the Client then select **Opt Out** when the process is successful the following screen appears:



Click **OK**, you will see the **Opted In** and **Status Changed** columns are updated.

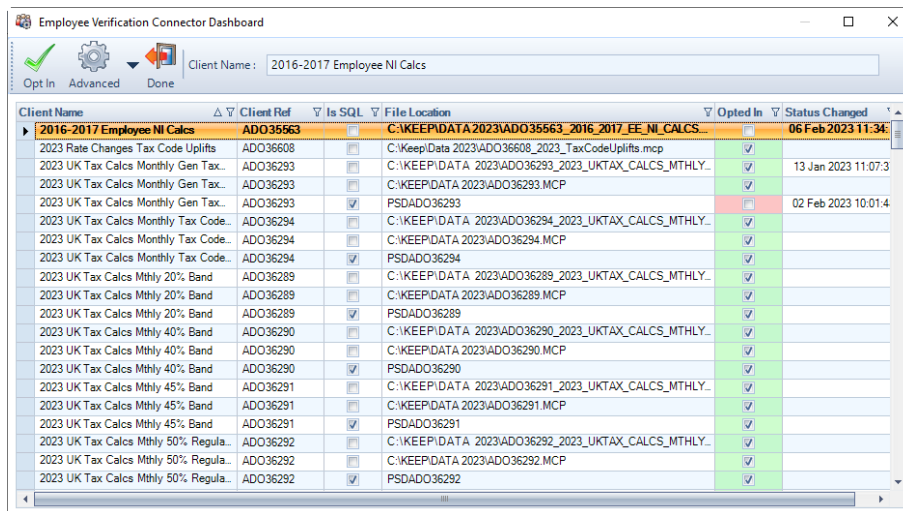
You can repeat the process for further Clients.

If the opt out process was unsuccessful the Client will continue to be opted in.

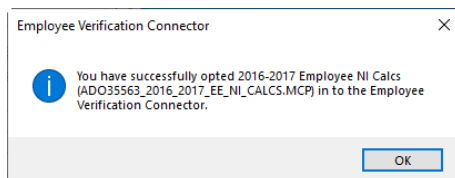
How to opt a Client in to EVC

Go to **Utilities** tab and select **Dashboard** within the **EVC** section.

If you have a payroll data file open, you will be prompted to close it before the following screen will appear:



Highlight the Client then select **Opt In** when the process is successful the following screen appears:



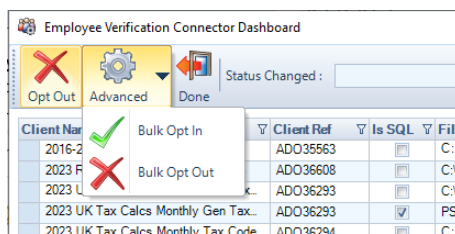
Click **OK**, you will see the **Opted In** and **Status Changed** columns are updated.

You can repeat the process for further Clients.

If the opt in process was unsuccessful the Client will continue to be opted out.

How to opt out multiple clients from EVC

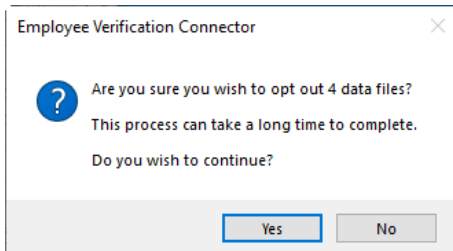
Go to **Utilities** menu and select the **EVC Dashboard**, under the **Advanced** menu select **Bulk Opt Out**.



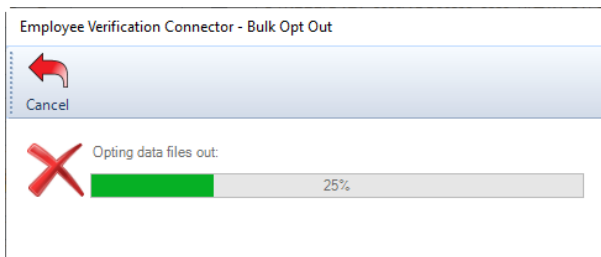
The following screen appears, which includes Clients that are currently opted in to EVC:

Selected	Client Name	Client Ref	Is SQL	File Location	Opted In	Status Changed
<input type="checkbox"/>	2016-2017 Employee NI Calcs	ADO35663	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO35663_2016_2017_EE_NI_CA...	<input checked="" type="checkbox"/>	06 Feb 2023 11:35:2
<input type="checkbox"/>	2023 Rate Changes Tax Code Uplifts	ADO36608	<input type="checkbox"/>	C:\Keep\Data 2023\ADO36608_2023_TaxCodeUplifts.mcp	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Monthly Gen Ta...	ADO36293	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36293_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	13 Jan 2023 11:07:3
<input type="checkbox"/>	2023 UK Tax Calcs Monthly Gen Ta...	ADO36293	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36293.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Monthly Tax Co...	ADO36294	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36294_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Monthly Tax Co...	ADO36294	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36294.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Monthly Tax Co...	ADO36294	<input checked="" type="checkbox"/>	PSDADO36294	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 20% Band	ADO36289	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36289_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 20% Band	ADO36289	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36289.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 20% Band	ADO36289	<input checked="" type="checkbox"/>	PSDADO36289	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 40% Band	ADO36290	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36290_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 40% Band	ADO36290	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36290.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 40% Band	ADO36290	<input checked="" type="checkbox"/>	PSDADO36290	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 45% Band	ADO36291	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36291_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 45% Band	ADO36291	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36291.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 45% Band	ADO36291	<input checked="" type="checkbox"/>	PSDADO36291	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 50% Regu...	ADO36292	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36292_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 50% Regu...	ADO36292	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36292.MCP	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly 50% Regu...	ADO36292	<input checked="" type="checkbox"/>	PSDADO36292	<input checked="" type="checkbox"/>	
<input type="checkbox"/>	2023 UK Tax Calcs Mthly Variable	ADO36296	<input type="checkbox"/>	C:\KEEP\DATA_2023\ADO36296_2023_UKTAX_CALCS...	<input checked="" type="checkbox"/>	

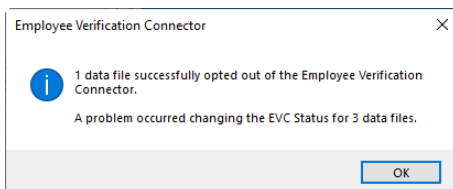
Tick the **Selected** box for each Client that you want to opt out, then click **Opt Out**. The following message appears, which includes the number of Client payroll data files you have selected:



To continue to Opt the Clients out of EVC, click **Yes**, a progress bar appears:



Once the process is complete, a message appears informing you how many Client payroll data files were successfully opted out and how many were unsuccessful:



Click on **OK**.

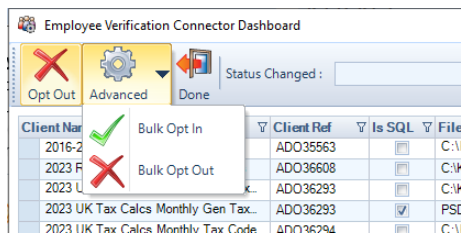
The Client payroll data files successfully opted out will no longer appear in the **Bulk Opt Out** screen.

The unsuccessful Client payroll data files will continue to appear in the **Bulk Opt Out** screen, you will need check whether:

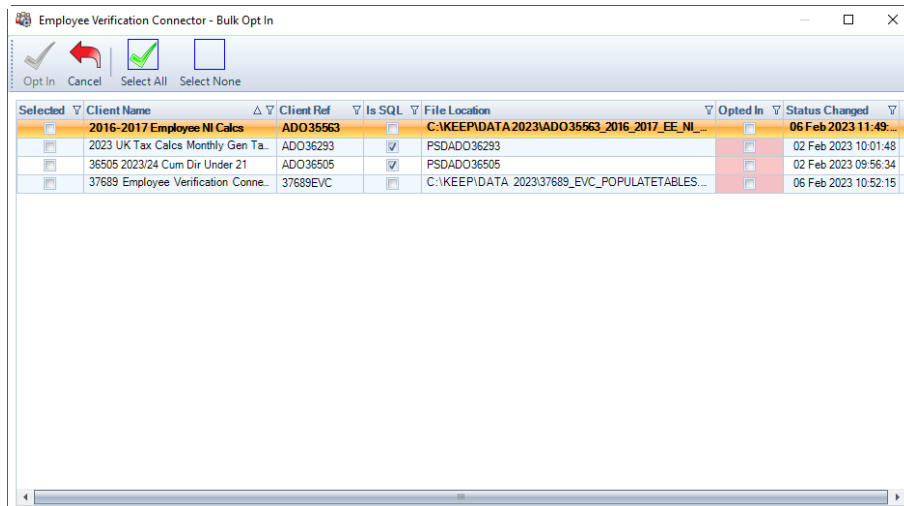
- the payroll data is up to date, if it is not up to date then open in IPP and retry the Opt in/Opt out process
- if the payroll data file requires a password to open in IPP then use the Opt in/Opt out process via the EVC Dashboard

How to opt in multiple clients to EVC

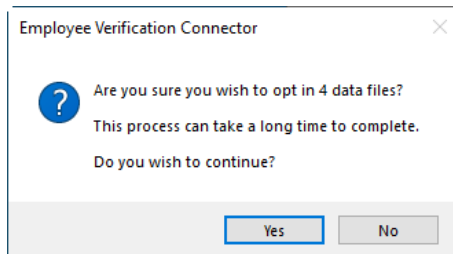
Go to **Utilities** menu and select the **EVC Dashboard**, under the **Advanced** menu select **Bulk Opt In**.



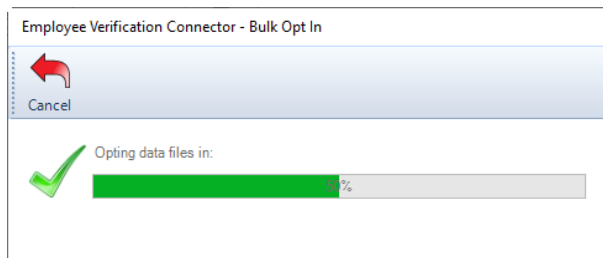
The following screen appears, which includes Clients that are currently opted out of EVC:



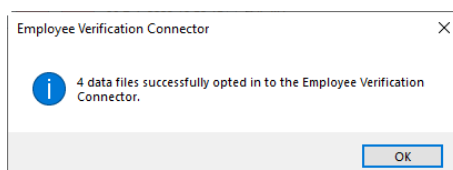
Tick the **Selected** box for each Client that you want to opt in, then click **Opt In**. The following message appears, which includes the number of Client payroll data files you have selected:



To continue to Opt the Clients in to EVC, click **Yes**, a progress bar appears:



Once the process is complete, a message appears informing you how many Client payroll data files were successfully opted in and how many were unsuccessful:



Click on **OK**.

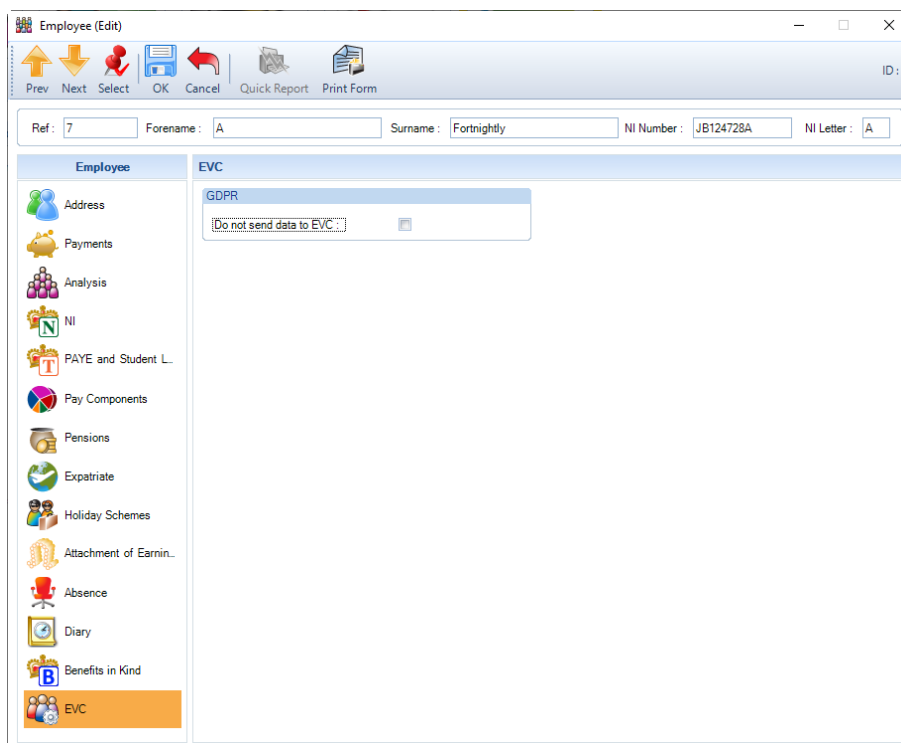
The Client payroll data files successfully opted in will no longer appear in the **Bulk Opt In** screen.

The unsuccessful Client payroll data files will continue to appear in the **Bulk Opt In** screen and will still be opted in to EVC, you will need check whether:

- the payroll data is up to date, if it is not up to date then open in IPP and retry the Opt in/Opt out process
- if the payroll data file requires a password to open in IPP then use the Opt in/Opt out process via the EVC Dashboard

Employee Details

When a Client is **opted in** to EVC, an **EVC** tab becomes available under **Employee Details**:



The screenshot shows the 'Employee (Edit)' window with the following details:

- Ref: 7, Forename: A, Surname: Fortnightly, NI Number: JB124728A, NI Letter: A
- Navigation buttons: Prev, Next, Select, OK, Cancel, Quick Report, Print Form
- Employee details menu: Address, Payments, Analysis, NI, PAYE and Student L., Pay Components, Pensions, Expatriate, Holiday Schemes, Attachment of Earnin..., Absence, Diary, Benefits in Kind, EVC
- EVC tab: GDPR, Do not send data to EVC (checkbox)

- **Do not send data to EVC** – if an employee requests for their data to not be sent to EVC, then tick the box.

New Employee Wizard

When a Client is **opted in** to EVC, in the **New Employee Wizard** under the **Main Employee Details** screen there is a section called **EVC** which includes the setting **Do not send data**:

The screenshot shows the 'New Employee Wizard' window with the 'Main Employee Details' section. The 'EVC' section is active, and the 'Do not send data' checkbox is checked. The 'Employment Details' section shows 'Employee' selected for 'Employment status' and 'Not Applicable' for 'Sub contractor'. The 'RTI' section shows 'Irregular Employment' checked and 'Omit From RTI' checked.

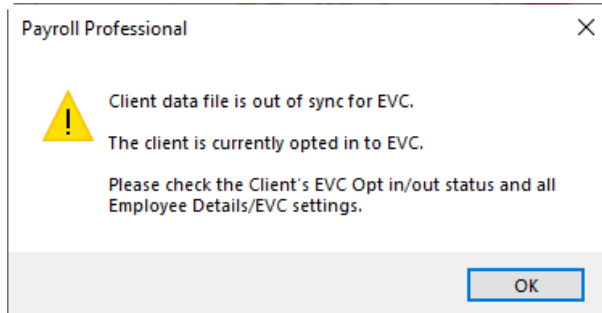
If the employee has requested for their data to not be sent to EVC, then tick the box **Do not send data**. Continue the New employee wizard as normal.

The EVC section is disabled when the record you are setting up is a **sub contractor**, as it only applies to employees.

The screenshot shows the 'New Employee Wizard' window with the 'Main Employee Details' section. The 'EVC' section is disabled, and the 'Do not send data' checkbox is greyed out. The 'Employment Details' section shows 'Employee' selected for 'Employment status' and 'Higher Rate' selected for 'Sub contractor'. The 'RTI' section shows 'Irregular Employment' checked and 'Omit From RTI' checked.

Out of Sync

When opening a Clients payroll data file in IPP if the Employers EVC information is out of sync, for example if a payroll data file has been restored, you will see a message similar to below:



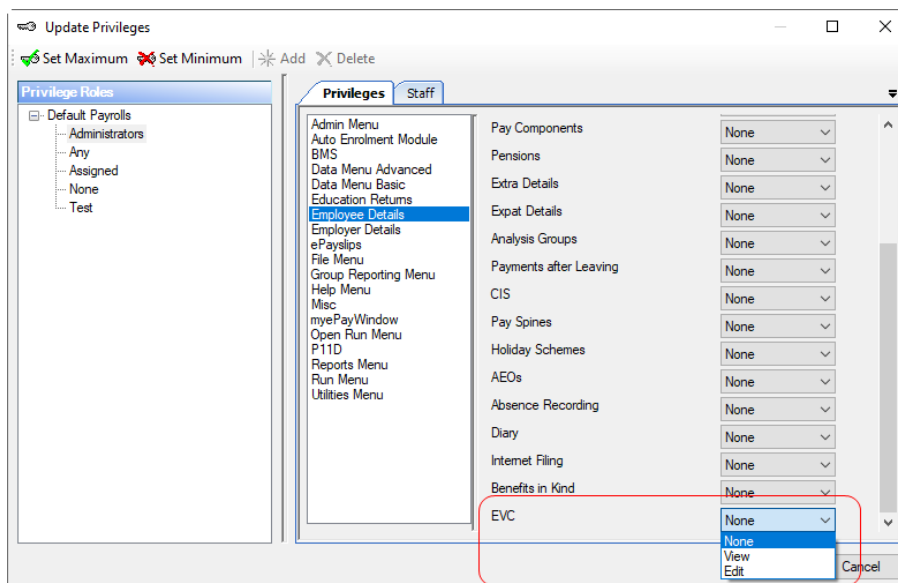
You will need to review the Client to ensure their EVC Opt in/Opt Out status is correct, if it is not correct then follow the Opt In/Opt Out process.

And if the Client is opted in to EVC, ensure that all employees EVC settings in Employee Details are up to date.

Privileges

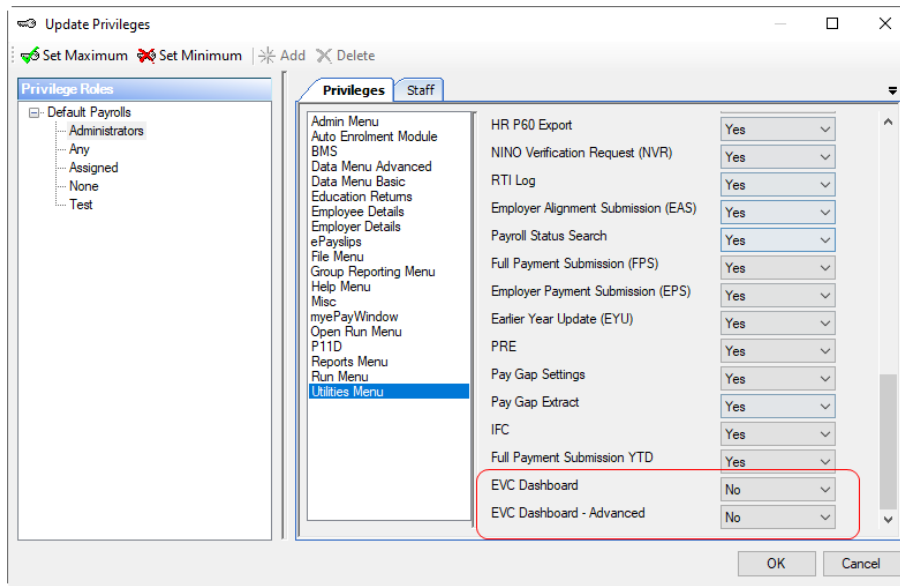
Employee Details

You can set privileges to restrict users access to the **EVC** tab in **Employee Details**:



EVC Dashboard

You can set privileges for which users have access to the **EVC Dashboard** and the **Advanced** tab:



Enhancement Requests

Import Payrolled Cars

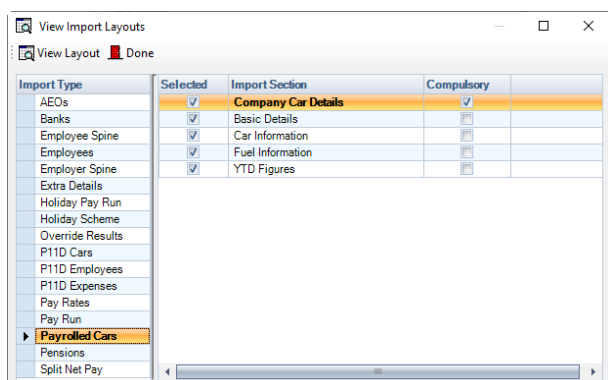
We have added the ability to import payrolled company car and fuel details from tax year 2022/23 onwards.

This option is only available if you are licensed for the Import module.

The Employee Payrolled Cars Import facility enables you to import Car and Fuel information by reading information from an appropriately formatted text file, which can be produced from a spreadsheet.

View Layout

To view the sections and columns required for Import Payrolled Cars, go to **Data\Importing\View Import Layouts** then highlight **Payrolled Cars**:



To see the columns required, click on **View Layout**:

Column	No	Section	Description	Type	Length	Required	Comment
A	1	Company Car...	Employee ID	Numeric		Yes	Employee ID
B	2	Company Car D...	Surname	Text		Yes	Surname
C	3	Company Car D...	Ee BIK Car ID	Numeric		Yes	Car ID
D	4	Company Car D...	Registration Number	Text	10	Yes	Registration number of car; used to identify the car, must be unique
E	5	Company Car D...	Make and Model	Text	30	Yes	Make and model of car
F	6	Basic Details	Engine Size	Numeric		No	Engine size in cc
G	7	Basic Details	Registration Date	Date		No	Date of first registration
H	8	Basic Details	List Price of Car	Numeric		No	List price of the car
I	9	Basic Details	Accessories	Numeric		No	Total of all accessories and optional extras
J	10	Basic Details	Capital Contribution	Numeric		No	Total amount employee paid towards the cost of the car.
K	11	Basic Details	Approved CO2 Emissions	Text		No	Is there an approved emission value for this vehicle (Y/N)
L	12	Basic Details	Emissions g/km	Numeric		No	CO2 emitted per km in g
M	13	Basic Details	Fuel Type	Text		No	Diesel (D), Diesel RDE2 Compliant (F), Other (A)
N	14	Basic Details	Electric Mileage	Numeric		No	Range of electric vehicle in miles
O	15	Car Information	Payment For Private Use	Numeric		No	Cash paid for private use
P	16	Car Information	Availability From	Date		No	First day car is available to the employee
Q	17	Car Information	Availability To	Date		No	Last day car was available to the employee
R	18	Car Information	Days Unavailable	Numeric		No	Number of days car was not available between Available From and To dates
S	19	Car Information	Car OPRA (Salary Sacrifice)	Text		No	Was the car salary sacrificed (Y/N)
T	20	Car Information	Car Amount Foregone	Numeric		No	Enter amount salary sacrificed
U	21	Fuel Information	Free Fuel	Text		No	Was fuel provided to the employee (Y/N)
V	22	Fuel Information	Free Fuel Available From	Date		No	Date free fuel was provided from
W	23	Fuel Information	Free Fuel Withdrawn	Date		No	Date free fuel withdrawn
X	24	Fuel Information	Free Fuel Reinstated	Text		No	Was free fuel re-instated (Y/N)
Y	25	Fuel Information	Fuel OPRA (Salary Sacrifice)	Text		No	Was the free fuel salary sacrificed (Y/N)
Z	26	Fuel Information	Fuel Amount Foregone	Numeric		No	Enter amount salary sacrificed
AA	27	YTD Figures	Car Payrolled YTD	Numeric		No	Car payrolled YTD
AB	28	YTD Figures	Free Fuel Payrolled YTD	Numeric		No	Free fuel payrolled YTD

Predefined Query

Go to the **Utilities** tab and select **Query Manager** under **Pre-Defined Queries** there is a query called **Payrolled Cars Import Information** for exporting details in the correct format (for re-importing).

The query is created with the fields for each group kept together and displayed as five clearly defined statements (there are four sections but five statements as the fifth statement is the linking information).

To amend the query, simply locate the statement(s) for any groups not required and delete these sections from the query.

Please note: To amend the query you must remove whole groups only.

The first and last blocks in the query must be retained. The first block contains the Basic Details section, which is compulsory, and the last block contains all the table links and filters for gathering information.

For new payrolled car records you must import the sections Company Car Details, Basic Details and Car Information.

This is what the complete query looks like:

```

SELECT [EeDetails].[EeID]
, [EeDetails].[Surname]
, [EeBIK_Car].[EeBIK_Car_ID]
, [EeBIK_Car].[Registration_Number]
, [EeBIK_Car].[Make_And_Model]

, [EeBIK_Car].[Engine_Size]
, [EeBIK_Car].[Car_First_Registered]
, [EeBIK_Car].[List_Price]
, [EeBIK_Car].[Accessories]
, [EeBIK_Car].[Capital_Contribution]
, IIF([EeBIK_Car].[Approved_CO2_Emissions]=False OR IsNULL([EeBIK_Car].[Approved_CO2_Emissions]),'N','Y')
AS [Approved CO2 Emissions]
, [EeBIK_Car].[Approved_CO2_Emissions_g_km]
, CHOOSE(IIF(IsNULL([EeBIK_Car].[Fuel_Type]),0,[EeBIK_Car].[Fuel_Type]),'D','A','F') AS [Fuel Type]
, [EeBIK_Car].[Electric_Mileage]

, [EeBals_BIK_Car].[Payment_For_Private_Use]
, [EeBals_BIK_Car].[Car_Available_From]
, [EeBals_BIK_Car].[Car_Available_To]
, [EeBals_BIK_Car].[Number_Days_Unavailable]
, IIF([EeBals_BIK_Car].[Car_OPRA]=False OR IsNULL([EeBals_BIK_Car].[Car_OPRA]),'N','Y') AS [Car OPRA]
, [EeBals_BIK_Car].[Car_Amount_Foregone]

, IIF([EeBals_BIK_Car].[Free_Fuel]=False OR IsNULL([EeBals_BIK_Car].[Free_Fuel]),'N','Y') AS [Free Fuel]
, [EeBals_BIK_Car].[Free_Fuel_Available_From]
, [EeBals_BIK_Car].[Free_Fuel_Withdrawn]
, IIF([EeBals_BIK_Car].[Free_Fuel_Reinstated]=False OR
IsNULL([EeBals_BIK_Car].[Free_Fuel_Reinstated]),'N','Y') AS [Free Fuel Reinstated]
, IIF([EeBals_BIK_Car].[Fuel_OPRA]=False OR IsNULL([EeBals_BIK_Car].[Fuel_OPRA]),'N','Y') AS [Fuel OPRA]
, [EeBals_BIK_Car].[Fuel_Amount_Foregone]

, [EeBals_BIK_Car].[Car_Cash_Equivalent_Payrolled_TD]
, [EeBals_BIK_Car].[Free_Fuel_Cash_Equivalent_Payrolled_TD]

FROM (([EeDetails] INNER JOIN [EeBIK] ON [EeDetails].[EeID] = [EeBIK].[EeID]) INNER JOIN [EeBIK_Car] ON
[EeBIK].[EeID] = [EeBIK_Car].[EeID] AND [EeBIK].[EeBIK_Specific_ID] = [EeBIK_Car].[EeBIK_Car_ID]) INNER JOIN
[EeBals_BIK_Car] ON [EeBIK_Car].[EeBIK_Car_ID] = [EeBals_BIK_Car].[EeBIK_Car_ID] AND [EeBIK].[PYear] =
[EeBals_BIK_Car].[PYear] WHERE {RS}[EeBIK].[PYear] = {RE} AND [EeBIK].[Calculation_Type] = 0 AND
[EeBIK].[BIK_Type_ID] = 1

```

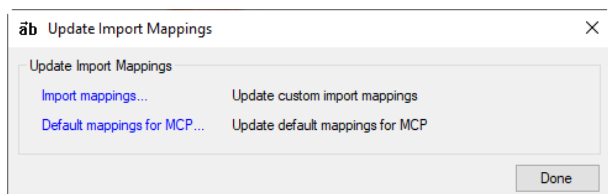
This is the complete group/field list for the Payrolled Cars Import format: -

Section	Fields to be imported
Company Car Details	EeID Surname Ee BIK Car ID Registration Number Make and Model
Basic Details	Engine Size Registration Date List Price of Car Accessories Capital Contribution Approved CO2 Emissions Emissions g/km Fuel Type Electric Mileage
Car Information	Payment For Private Use Availability From Availability To Days Unavailable Car OPRA (Salary Sacrifice) Car Amount Foregone
Fuel Information	Free Fuel Free Fuel Available From Free Fuel Withdrawn Free Fuel Reinstated Fuel OPRA (Salary Sacrifice) Fuel Amount Foregone
YTD Figures	Car Payrolled YTD Free Fuel Payrolled YTD

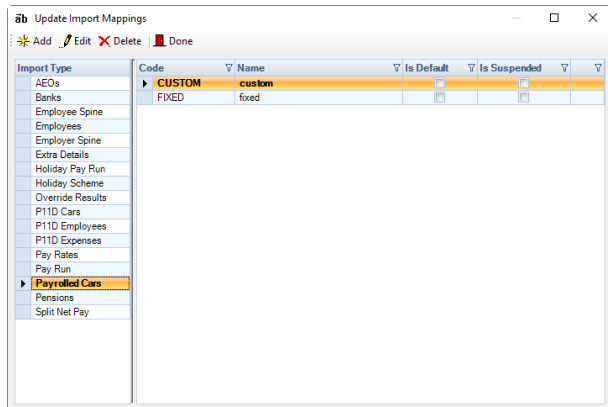
Custom Import Mapping

You can set up a custom import mapping for the Payrolled Cars, in the same way as other import types.

Under the **Admin** tab select **Import Mappings** to see the following screen.



Click on Import Mappings to create a mapping layout for Payrolled car import routine:



Highlight **Payrolled Car** then click on **Add** (or right click in the grey space on the right of the screen and select **Add**).

The remainder of the process is the same as other import types.

Importing the File

For new records enter 0 (zero) in the Ee BIK Car ID column.

Import File Validation

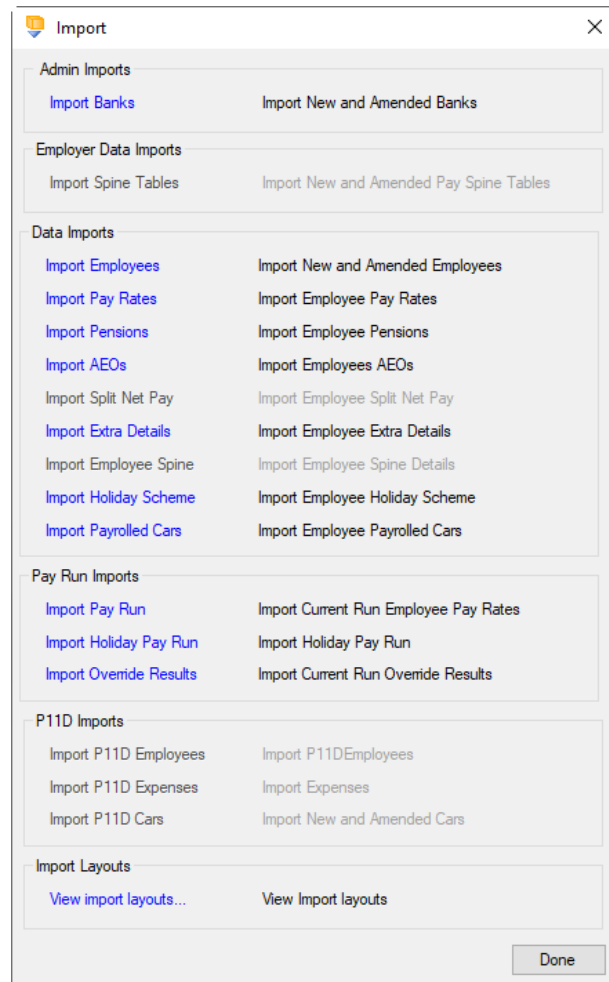
The following validations are performed:

- **Registration Number** - must be completed. Unique for each record in the Payroll tax year, to ensure an Employee can only have one car record per Car Registration number in the same payroll year. Restricted to maximum 10 characters, letters numbers and space are accepted.
- **Make and Model** - must be completed, maximum 35 characters
- **Engine Size** - must be completed if the Registration date is before 1st January 1998, or when the registration date is after and an approved CO2 emissions is not entered. Maximum 9999
- **Registration Date** - must be completed, not before 1st January 1904 and no later than today's date or the end of the current tax year
- **List price of car** - must be completed, minimum 1000.00 and maximum 9,999,999.99
- **Accessories** - minimum 0 and maximum 999,999.99
- **Capital contributions** – minimum 0 and maximum 5000.00
- **Approved CO2 Emissions** - must be Y/N, if blank or an invalid character then treated as N
- **Emissions g/km** - must only be completed when Approved CO2 Emissions is Y, minimum 0 and maximum 999
- **Fuel Type** - must be D, F or A, when F then Registration Date must be on or after 1st Sept 2017
- **Electric Mileage** – minimum 0 and maximum 9999. Must only be completed when the Approved CO2 K/gm is from 1 to and including 50.
- **Payment for Private use** – minimum 0 and maximum 9,999,999.99
- **Available From** - must be before the last day of the current tax year, and on or after the Registration Date, on or before the employees leave date
- **Available To** - can be blank, if completed must be within the current tax year, on or after Available from, on or before the employees leave date
- **Days unavailable** - must not exceed the days available within Available From and Available To dates
- **Car OPRA** - must be Y/N, cannot be Y when Emissions is 75 or less, if blank or an invalid character then treated as N

- **Car - Amount foregone** – minimum 0 and maximum 9,999,999.99
- **Free Fuel** - must be Y/N, if blank or an invalid character then treated as N
- **Free Fuel Available From** - only to be completed if Free Fuel is Y, must be on or after the Available From date, before the last day of the current tax year or employees leave date
- **Free Fuel Withdrawn** - only to be completed if Free Fuel is Y, can be blank, must be on or after Free Fuel Available From, before last day of the current tax year or employees leave date
- **Free Fuel Reinstated** - can only be completed if Free Fuel Withdrawn has been completed, Y/N, if blank or an invalid character then treated as N
- **Free Fuel OPRA** - must be Y/N, if blank or an invalid character then treated as N
- **Fuel - Amount foregone** – must only be completed when Free Fuel OPRA is Y, minimum 0 and maximum 9,999,999.99
- **Car - Payrolled** - minimum 0 and maximum 99,999,999.99
- **Fuel - Payrolled** - minimum 0 and maximum 99,999,999.99

Wizard

Select **Import** under the **Data** tab.



Click on the blue link for **Import Payrolled Cars**

At the Welcome screen click **Next**.

Choose Fixed or Custom and click **Next** to continue.

The screenshot shows the 'Payrolled Cars Import Wizard' dialog box. The title bar reads 'Payrolled Cars Import Wizard'. Below the title bar, the text 'Import Layout Type Select' is displayed, followed by the instruction 'Select the type of layout required'. Under the heading 'Layout Type:', there are two radio button options: 'Fixed layout' (which is selected) and 'Custom layout'. At the bottom right of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Fixed Layout

If the fixed layout is selected, then you must now set these details:

- Field Separator
- Headings
- Type of update
- Validate surname
- Validate car registration number
- Record Identifiers

Click **Next** to continue.

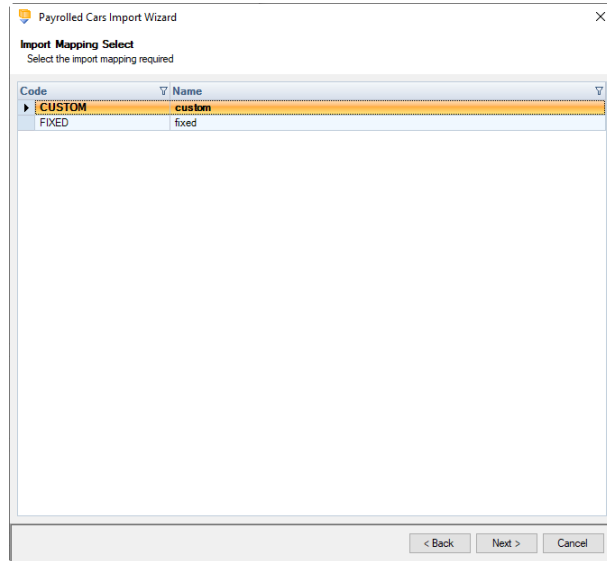
The screenshot shows the 'Payrolled Cars Import Wizard' dialog box at the 'Import Format' step. The title bar reads 'Payrolled Cars Import Wizard'. Below the title bar, the text 'Import Format' is displayed, followed by the instruction 'Select the import format required'. The dialog is divided into three sections: 'Field Separators', 'Miscellaneous', and 'Record Identifiers'.
In the 'Field Separators' section, there are five radio button options: 'Comma' (selected), 'Space', 'Pipe', 'Tab', and 'User defined'.
In the 'Miscellaneous' section, there are three options: 'Contains headings:' with a checked checkbox, 'Record update type:' with a dropdown menu set to 'Add and Amend Records', 'Validate surname:' with an unchecked checkbox, and 'Validate car registration number:' with an unchecked checkbox.
In the 'Record Identifiers' section, there is a table with two columns: 'Column' and 'Contents'. The table contains one row with 'Employee' in the 'Column' and 'ID' in the 'Contents'.
At the bottom right of the dialog, there are three buttons: '< Back', 'Next >', and 'Cancel'.

Custom Layout

If the custom layout is selected, then you can now choose which layout is being imported.

You can view the layout of the fields selected by right-clicking anywhere on the body of the screen and select View Layout.

Click **Next** to continue.

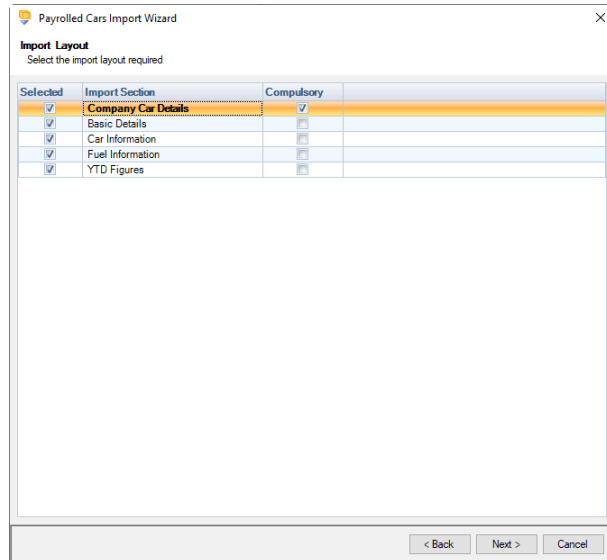


Fixed Layout

For the fixed layout only, you must now choose the sections that are to be imported.

You can view the layout of the fields selected by right-clicking anywhere on the body of the screen and select View Layout.

Click **Next** to continue.



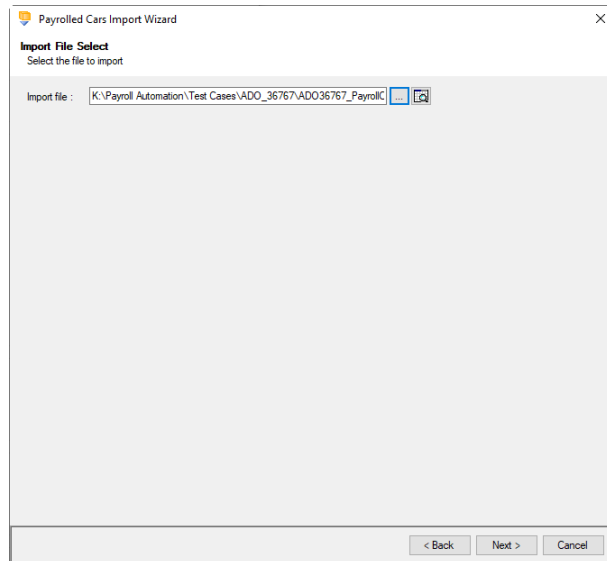
On the next screen you need to select the file to be imported either by typing the name or clicking on the Browse button.



This option will allow the user to view the currently selected import file in Notepad.

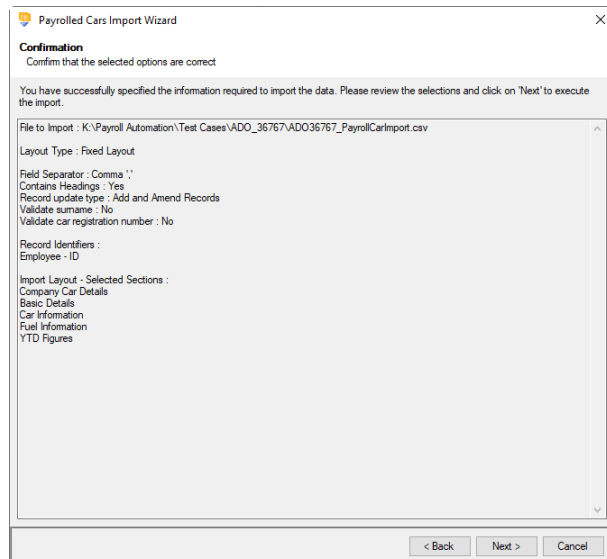
Edits can be made to the CSV file here and saved before importing.

Click **Next** to continue.



For both layouts you are now presented with a confirmation screen showing all the details regarding the file being imported.

Click on the **Next** button to validate the file before importing.



The uppermost message on the screen will be whether the file has passed validation or how many errors it contains.

Click **OK** to remove the message and you can see the details of any rejections.

The results section at the bottom of the screen shows how many lines failed and will not be imported. As well as the number of lines which passed and will import should you choose to continue.

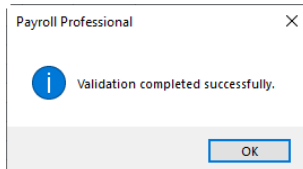
The **Print** or **Preview** buttons will produce a landscape flat text report showing the information currently displayed, based on the filters you have selected.

If you want to view only those lines rejected, use the **Filter** icon on the **Error** column and select true. The report printed or previewed will only contain the rejected records.

To interrupt the checking process, use the **Stop** button.

Click **Back** to change any options.

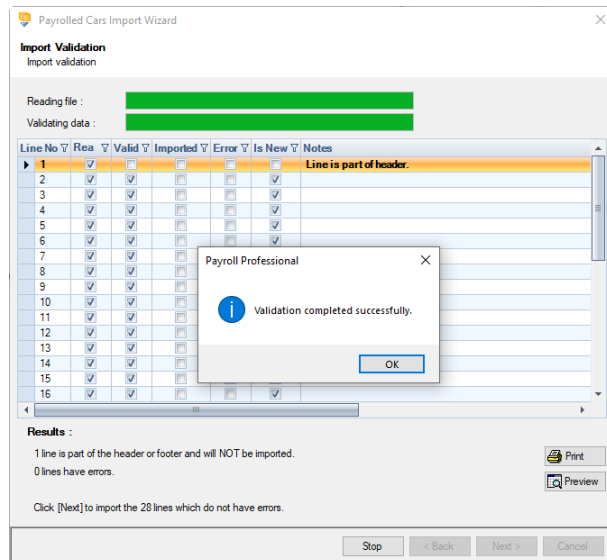
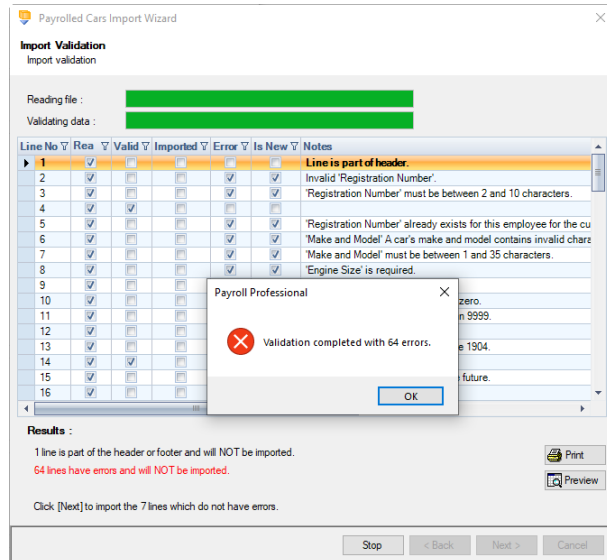
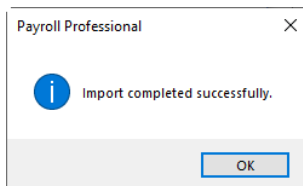
When the file passes the tests you will see the following message.



If you want to import the records that have passed validation, click **Next** to continue.

You will now see the final message as to what has imported successfully.

Click on **OK** then **Finish** to end the process.



Audit trail

Details of changes made to new and existing payrolled cars, are recorded in the audit trail. This is a useful way of tracing changes made to payrolled car records that had not been anticipated.

Employees Grid



When you select the **Employees** button under the **Home** or **Data** tab you are presented with a list of the Employees.


Ref	Title	Surname	Forename	NI Number	Department	Run Group	Pay Grade	Cost Centre	Frequency	Branch	Is CIS	CIS Name
24 209	Mrs	Booth	Laura	JG525252C	Admin				Weekly	Swindon	<input type="checkbox"/>	
34 309	Mrs	Booth	Pamela	JG525252C	Construction				Monthly	Eastbourne	<input type="checkbox"/>	
22 207	Mr	Brown	David	PV033444A	Construction				Monthly	London	<input type="checkbox"/>	
38 314	Miss	Carter	Carol	LW494949B	Construction				Monthly	Eastbourne	<input type="checkbox"/>	
28 214	Miss	Carter	Joyce	LW494949B	Warehouse				Monthly	Swindon	<input type="checkbox"/>	
9 144	Miss	Clayton	Xavier	JK474747A	HR				Monthly	Brighton	<input type="checkbox"/>	
30 303	Mr	Cooper	Philip	A2798243C	Warehouse				Monthly	Swindon	<input type="checkbox"/>	
17 153	Mrs	Davies	Nancy	JC535353D	Warehouse				Weekly	Seaford	<input type="checkbox"/>	
4 126	Mrs	Edwards	Fiona		Warehouse				Monthly	Seaford	<input type="checkbox"/>	
16 152	Mr	Edwards	Oscar	OES25252A	Construction				Weekly	London	<input type="checkbox"/>	
15 151	Miss	Foster	Pauline	NA515151B	Construction				Weekly	London	<input type="checkbox"/>	
29 302	Miss	Green	Sarah		Warehouse				Monthly	Swindon	<input type="checkbox"/>	



Click on this button, you will see the following have been added to the Columns available to show under the Employee grid:

- NI Letter
- Working in a Freeport
- Veterans First Civilian Employment
- Email Address
- NI Status
- Directorship Start Date
- Standard Hours

Field Name	Selected
Branch	<input checked="" type="checkbox"/>
CIS Name	<input type="checkbox"/>
Cost Centre	<input type="checkbox"/>
Date of Birth	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>
Directorship Start Date	<input checked="" type="checkbox"/>
Email Address	<input checked="" type="checkbox"/>
Favourites	<input checked="" type="checkbox"/>
Frequency	<input checked="" type="checkbox"/>
Irregular Employment	<input type="checkbox"/>
Is CIS	<input type="checkbox"/>
Is Leaver	<input type="checkbox"/>
Leave Date	<input type="checkbox"/>
NI Letter	<input checked="" type="checkbox"/>
NI Number	<input checked="" type="checkbox"/>
NI Status	<input checked="" type="checkbox"/>
Off Payroll Worker	<input type="checkbox"/>
Omit from RTI	<input type="checkbox"/>
Pay Grade	<input type="checkbox"/>
Pay Method	<input type="checkbox"/>
Run Group	<input type="checkbox"/>
Standard Hours	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Tax Code	<input checked="" type="checkbox"/>
Title	<input type="checkbox"/>
Transfer Date	<input type="checkbox"/>
Veterans First Civilian Employment	<input checked="" type="checkbox"/>
Week/Month 1	<input checked="" type="checkbox"/>
Working in a Freeport	<input checked="" type="checkbox"/>

Tick the box for the information that you want to show in the columns and un-tick the ones you do not want to show. Once you have made your selections click on the  button.

This column selection is saved for the user.

Calculations grid



Calculations

When you select the **Calculations** button, a list of the Employees will appear.


Emp ID	Rf	Surname	Forename	Status	NI Number	Department	Run Group	Pay Grade	Cost Centre	Branch	Is CIS	CIS Name	Tax Code
34	309	Booth	Pamela	Uncalculated	JG525252C					Eastbourne	<input type="checkbox"/>		1006L
22	207	Brown	David	Uncalculated	PV0333444A	Construction				London	<input type="checkbox"/>		710L
38	314	Carter	Carol	Uncalculated	LV494949B	Construction				Eastbourne	<input type="checkbox"/>		K495
28	214	Carter	Joyce	Uncalculated	LV494949B	Warehouse				Swindon	<input type="checkbox"/>		K180
9	144	Clayton	Xavier	Uncalculated	JK474747A	HR				Brighton	<input type="checkbox"/>		944L
30	303	Cooper	Philip	Uncalculated	A2788243C	Warehouse				Swindon	<input type="checkbox"/>		BR
4	126	Edwards	Fiona	Uncalculated		Warehouse				Seaford	<input type="checkbox"/>		898L
29	302	Green	Sarah	Uncalculated		Warehouse				Swindon	<input type="checkbox"/>		K341
7	140	Hughes	Bianca	Uncalculated	HA474747B	Accounts				Hove	<input type="checkbox"/>		K80
3	125	Irvine	Isabel	Uncalculated	NA52255A	Warehouse				Seaford	<input type="checkbox"/>		K240
12	148	Irvine	Tracy	Uncalculated	NA123574A	HR				Brighton	<input type="checkbox"/>		944L
5	128	Keegan	Lestley	Uncalculated	LL777545B	Warehouse				Seaford	<input type="checkbox"/>		724L
6	136	Lambert	Sarah	Uncalculated	LR111222A	HR				Brighton	<input type="checkbox"/>		1569L
36	312	Mason	Colin	Uncalculated	RR224499B	Construction				Eastbourne	<input type="checkbox"/>		791L
20	205	North	Helen	Uncalculated	ZP323232D	Admin				Eastbourne	<input type="checkbox"/>		1112L
31	305	North	Irene	Uncalculated	ZP343434D	Construction				Swindon	<input type="checkbox"/>		1112L
32	306	Reed	Aime	Uncalculated	NR323232B	Construction				Swindon	<input type="checkbox"/>		531L
2	122	Smith	Ann	Uncalculated	JN323232B	Admin				Brighton	<input type="checkbox"/>		730L
10	145	Upton	Olga	Uncalculated	KL161616D	HR				Brighton	<input type="checkbox"/>		944L
11	146	Xeni	Victor	Uncalculated	NA444848A	HR				Brighton	<input type="checkbox"/>		BR
35	311	Yates	Joanne	Uncalculated	LL777444B	Construction				Eastbourne	<input type="checkbox"/>		531L



Click on this button, you will see the following have been added to the Columns available to show under the Calculation grid:

- NI Letter
- Working in a Freepport
- Veterans First Civilian Employment
- Date of Birth
- Start Date
- Leave Date
- Week/Month 1
- Email Address
- NI Status
- Directorship Start Date
- Standard Hours

Field Name	Selected
Branch	<input checked="" type="checkbox"/>
CIS Name	<input type="checkbox"/>
Cost Centre	<input type="checkbox"/>
Date of Birth	<input checked="" type="checkbox"/>
Department	<input checked="" type="checkbox"/>
Directorship Start Date	<input checked="" type="checkbox"/>
Email Address	<input checked="" type="checkbox"/>
Favourites	<input checked="" type="checkbox"/>
Irregular Employment	<input type="checkbox"/>
Is CIS	<input type="checkbox"/>
Leave Date	<input checked="" type="checkbox"/>
NI Letter	<input checked="" type="checkbox"/>
NI Number	<input checked="" type="checkbox"/>
NI Status	<input checked="" type="checkbox"/>
Off Payroll Worker	<input type="checkbox"/>
Pay Grade	<input type="checkbox"/>
Pay Method	<input checked="" type="checkbox"/>
Run Group	<input type="checkbox"/>
Standard Hours	<input checked="" type="checkbox"/>
Start Date	<input checked="" type="checkbox"/>
Status	<input checked="" type="checkbox"/>
Tax Code	<input checked="" type="checkbox"/>
Veterans First Civilian Employment	<input checked="" type="checkbox"/>
Week/Month 1	<input checked="" type="checkbox"/>
Working in a Freeport	<input checked="" type="checkbox"/>

Tick the box for the information that you want to show in the columns and un-tick the ones you do not want to show. Once you have made your selections click on the  button.

This column selection is saved for the user.

Payroll Run Export (PRE)

New columns added

The following columns have been added to PRE for you to choose to include in the export:

Personal Details section

- BirthDate – date of birth from Employee Details
- Gender – gender entered from Employee Details
- RunGroup – Run Group description from Employee Details
- EeAddr1 – address line 1 from Employee Details
- EeAddr2 – address line 2 from Employee Details
- EeAddr3 – address line 3 from Employee Details
- EeAddr4 – address line 4 from Employee Details
- Postcode – from Employee Details
- Country – from Employee Details
- BankCode – Sort Code from Employee Details
- BankACNo – Account Number from Employee Details
- BankACName – Account Name from Employee Details
- BldgSocRef – Building Society Reference from Employee Details
- BankAutoPayRef – Auto Payment Reference from Employee Details
- Working_In_Freeport – from the Calculation records
- Veterans_First_Civilian_Employment – from Employee Details

Pensions section

- PensionablePay – from the Calculation records by Pension Scheme
- Employee%age – employee percentage rate from the Calculation records by Pension Scheme
- Employer%age – employer percentage rate from the Calculation records by Pension Scheme
- ErNISaving – Er NI Saving contribution from the Calculation records by Pension Scheme

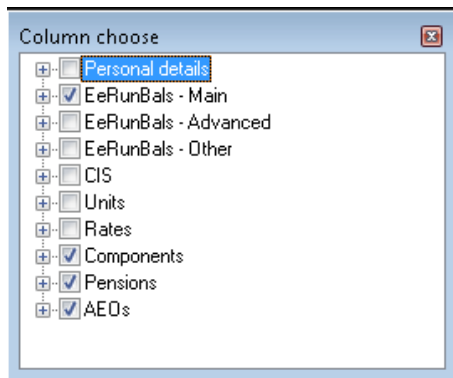


Whilst in PRE, select this button to choose the columns to include in the report layout.

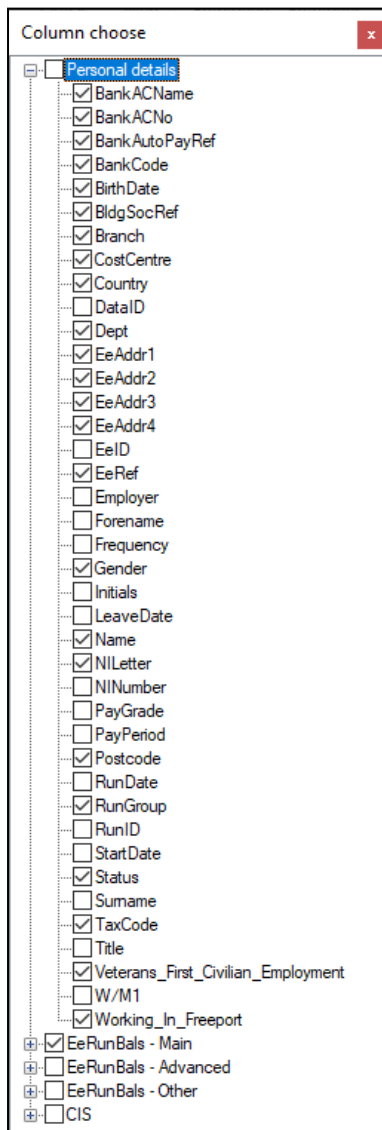
Drag a column header here to group by that column.

RunDate	Frequency	EeRef	Name	Dept
05/05/2011	Weekly	136	Lambert, Sarah	
05/05/2011	Weekly	141	Zelda, Allison	
05/05/2011	Weekly	145	Upton, Olga	
05/05/2011	Weekly	148	Irwin, Tracy	
05/05/2011	Weekly	149	Harding, Sharon	
05/05/2011	Weekly	151	Foster, Pauline	
05/05/2011	Weekly	152	Edwards, Oscar	
05/05/2011	Weekly	40	Rumble, Barney	

You will see the Column Choose screen:



To select specific columns click on the plus sign to the left of the section:



Then tick the box against the fields that you want to include in the report. Un-tick to remove them.

Column names

To ensure the export is generated where a Pay Component has the same description as a standard field from the tables such as the calculation records in EeRunBals, Attachment of Earnings and/or Pensions the following changes have been made:

- Pay Components will be suffixed with its ID in brackets if the description is the same as a standard field
- All Pension columns are suffixed with the columns type, for example employee contributions (Ee)
- Attachment of Earnings columns are suffixed with (AEO) if a Pay Component has the same description

These changes are to ensure each column has a unique name.

Fixes

Web ID	Area	Description of bug
2022032	Holiday Schemes	Since 2022 Update 4, when calculating Average pay based on Specific Pay Components, if you have more than one pay component selected the average is not calculating correctly.
2022034	Miscellaneous	PRE - the pay spine pay component retrospective value is not included in PRE when there is no value for the pay component this period.
2022035	Reports	PASEBDUK\PSSEBDUK - The net pay is not including the pence, so 100.00 becomes 1.00

All Report Changes

Report	Status	Type	Description
PAEP6023\PSEP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAKP6023\PSKP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAMP6023\PSMP6023	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP14P23\PSP14P23	New	Year End	New P60 report for 2022/23.
PAP60H23\PSP60H23	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP60P23\PSP60P23	New	Year End	New P60 report for 2022/23. PT to UEL value will include the NI Bands To FUST and To VUST.
PAP60ER\PSP60ER	Amended	Year End	Updated for 2022/23 onwards, PT to UEL value will include the NI Bands To FUST and To VUST.
PARUNMW\PSRUNMW	Amended	Payroll Run	Removed the default rates.
PANIPARA\PSNIPARA	Amended	Misc	From tax year 2022/23, added the new NI bands To FUST and To VUST and the five new NI Letters with their Employee and Employer Rates.
PAP32OLD\PSP32OLD	Amended	P Series	Updated to be able to report on closed tax year 2022/23
PACRNTB\PSCRNTB	Amended	Employee	Updated to reflect the new tax rates for 2023/24

Custom Reports

As there are numerous changes this year to fields in a several tables, we recommend that you verify your custom reports in Crystal.

Remember that these new fields will not automatically be added to your custom reports, you will need to amend your custom report in crystal to add the new fields that you require.

Database Structure Changes

Throughout the document we have detailed the reportable table and field changes, for those of you who write your own reports to make it easier. Alternatively, go to [File\Print Tables](#) to see all the changes.

On-line Help File

Remember the on-line help contains all the latest information regarding the program.

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