

### **IRIS PAYE-Master**

### Guide to creating Now output file

23/06/2015





- Introduction 2
- Now: Pensions configuration 3
- Pension Fund Configuration: 3
- Employee Details Configuration 3
- Add a Now Pensions Scheme Code 4
- Add a Now Pensions Pay Code 4
  - Create Output File 6
- Create a Now: Pensions output file: 6

Upload the Now Pensions V1.2 file to Now: Pensions 8



### Introduction

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

The guide covers:

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



### **Now: Pensions configuration**

Now: Pensions require you to supply your ER Code, Scheme Code and Pay Code in each output file. You enter the ER Code on the **Configure Pension Fund Details** screen, Scheme Code and Pay Code are entered on the **Employee Details** screen.

### **Pension Fund Configuration:**

Please Note: You may have completed the Pension Fund configuration when you created the pension deductions.

- 1. Go to the Pensions menu and select 'Configure Pension Fund Details'
- 2. Select the Now Pensions fund and click 'Edit'
- On the General tab, enter your ER Code in the Unique ID field

In the **Output File** field, select '**Now Pensions**' In the **Include Employees** field, select '**This fund only**'

d No 4	Now Pensions		
eneral Bank	Contributions		
Name	Now Pensions	Unique ID	WERT
Address	1 High Street	Output File	Now Pensions 💌
	Stockton	Include Employees	•
Postcode	TS18 3TP	Scheme Type	•
Telephone		Scheme Ref	
Contact		Minimum Contributio	n 0.00
Email Address		Last Payment	•
Website	[	Next Payment Due	· ·
Employee Portal	[	Special Tax Rules	Ves

4. Click 'Save' and then 'Close'

### **Employee Details Configuration**

You will need to select the Scheme Code and Pay Code for each employee.

- On the left-hand Selection Bar, select the appropriate employee to open their Employee Details
- 2. Select 'Pension Refs' tab
- For 'Scheme Code', choose the appropriate option from the Friends Life/Now Pensions
  Category dropdown field.

If the field doesn't contain the appropriate Scheme Code, click the icon to add it. Click <u>here</u> for instructions

 For 'Pay Code', choose the appropriate option from the Scottish Widows – Pay Group/Now PAY CODE dropdown field.

NEST Details		
Group	<none></none>	•
Date Group Changed		-
Payment Source	<none></none>	•
Date Payment Source Changed		-
Overseas National Awaiting NI Number		
Output File Fields		
Friends Life/Now Pensions - Category	123 💌	
Peoples Pension - Worker Group ID		
Scottish Widows - Pay Group/ Now PAY CODE	ABCD	

If the field doesn't contain the appropriate Pay Code, click the icon to add it. Click <u>here</u> for instructions

5. Click 'Save' and then click 'Close'



### Add a Now Pensions Scheme Code

 In Employee Details, on the Pension Refs tab click the icon to the right of the Friends Life/Now Pensions Category field to add a Scheme Code.

			Auto Absence Ca
nal   General   Pay Rates   Pay Metho	od   Tax Details   N.I. Details   Suni	dry Pension Pensi	on Refs
- NEST Details			
Group	<none></none>		•
Date Group Changed			•
Payment Source	<none></none>		•
Date Payment Source Cha	nged		- -
Overseas National Awaiting	g NI Number		
Output File Fields			-
Friends Life/Now Pensions	- Category	-(	
Peoples Pension - Worker	Group ID	-	
Scottish Widows - Pay Gro	oup/ Now PAY CODE		
			_

 On the Output Categories screen, click 'Add' to open the Add Category screen



 Enter the Scheme Code, click 'Save' to close the Add Category screen

Add Cate	gory		X
Enter Outpu	t Category: Office	e Staff	
	Save	Close	

4. On the Output Categories screen, click 'Close' to return to the Employee Details screen

### Add a Now Pensions Pay Code

 In Employee Details, on the Pension Refs tab click the icon to the right of the Scottish Widows – Pay Group/Now PAY CODE field to add a Pay Code.

Irenanal	General Pay Pates Pay Method Tay Detaile NI	Dataila Sunday Panajan Pension Refs	
cisonai [	deneral   Pay hates   Pay Method   Tax Details   N.I.	Details   Juliury   Perison	
	NEST Details		
	Group	(None)	
		1	
	Date Group Changed	<b>_</b>	
	Payment Source	<none></none>	
	Date Payment Source Changed	<b>_</b>	
	Overseas National Awaiting NI Number		
	Output File Fields		
	Friends Life/Now Pensions - Category	Office Staff	
	Peoples Pension - Worker Group ID	· · · · · ·	
	Scottish Widows - Pay Group/ Now PAY CODE		
	17		

# **IRIS**

 On the Pay Groups screen, click 'Add' to open the Add Pay Groups screen

Add	]
<u>E</u> dit	
<u>D</u> elete	
Close	ή I

 Enter the Pay Code, click 'Save' to close the Add Category screen

Add Pay Grou	р		×
Enter Pay Group:	ABC	)	
	Save	Close	

4. On the Pay Groups screen, click 'Close' to return to the Employee Details screen



### **Create Output File**

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

### **Create a Now: Pensions output file:**

- 1. Go to the Pensions menu and select 'Create Pension File'
- 2. On the Select File to Create screen, choose 'Now Pensions V1.2'
- 3. Click 'OK'
- On the Period for Contribution Schedule screen, the NEST Payment Frequency field is disabled
- In the Pension Fund field, choose your Now Pensions fund

mployee List	Note: Only periods that I	have been finalised can be u	sed to create the pension fi
Payment Source & Details NEST Payment Frequency Pension Fund	<select -<="" nest="" payment="" th=""><th>Pay Period Pay Frequency Period No</th><th>Weekdy</th></select>	Pay Period Pay Frequency Period No	Weekdy
Date Payment Due Payment Source	× ×	Date Range From To	× *

- 6. Date Payment Due and Payment Source fields are disabled
- Choose the Pay Frequency and Period No you processed the payroll for and had employees and/or employer pension contributions taken. Only periods that have been finalised can be used to create the pension file.
   Date Range fields will be disabled
- 8. Click 'OK'

Your payroll has the ability to hold back contributions, until the end of the opt-out window, as per the Pensions Regulator's advice. However, you should check with Now Pensions to see if they permit this option.

- 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.
- 10. Click 'Next'

Joe	04/09	5/2015	30/06/2015



- On the Now Pensions Contributions for...screen, click 'Print' to print a report of the employees that are included in the file.
- Click 'Create File' to create the Now Pensions
  V1.2 file

Total Pensionable Earnings	600.00
Total Employer Contributions	6.00
Total Employee Contributions	6.00
Number of employees with Reduced Contributions	0
Total employees included in the file	j.

- On the Save As screen, choose the location where the file will be created and then click 'Save'
- A message will advise the location where the Now Pensions V1.2 file has been created

C·\Program Files	(v86)\IRIS Software Ltd\PAVE-Master NET
The file name is	Now PensionsCSPM0082015050420150510.CSV



### Upload the Now Pensions V1.2 file to Now: Pensions

- 1. Login to your employer portal
- 2. Select the Import Data menu item
- 3. Choose the **Generic Input File** option, unless you have been told otherwise by Now.
- 4. Browse to the location where payroll created the Now Pensions V1.2 output file and then upload the file.

Click here for more information about uploading a Now: Pensions file.

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### Software available from IRIS

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

IRIS Payroll Business Intelligent, easy to use payroll software for smaller businesses

### **IRIS Payroll Professional**

Flexible payroll software for medium sized businesses

IRIS Bureau Payroll Intelligent management for multiple payrolls

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

#### **IRIS P11D**

The easy way to complete employee expenses and benefits returns

### **IRIS HR Manager**

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

### **IRIS OpenPayslips**

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

### **Stationery order line**

Tel: 0844 815 5656

### HMRC online service helpdesk

Tel: 0300 200 3600 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk

### **HMRC** employer helpline

Tel: 0300 200 3200

### HMRC employer helpline (for new business)

Tel: 0300 200 3211

### **Support**

Tel: 0844 815 5661 (Option 1) Fax: 0844 815 5665 Email: payroll@iris.co.uk

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