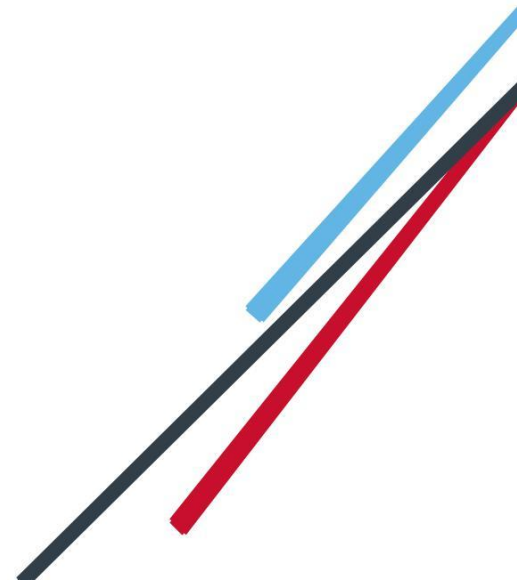




IRIS PAYE-Master

Guide to creating Peoples Pension output file

01/07/2015





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Introduction

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

The guide covers:

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

Peoples Pension Configuration

People's Pension require you to supply your B&CE account number, for the pension scheme, in each output file. You enter this number on the **Configure Pension Fund Details** screen.

Also, People's Pension require at least one Worker Group to identify the different contribution rates and earnings bases for different groups of employees. You could separate employees by different departments, sites or contribution levels.

The Worker Group is configured when you set up the employer's account with People's Pension, for more information click [here](#).

Pension Fund Configuration:

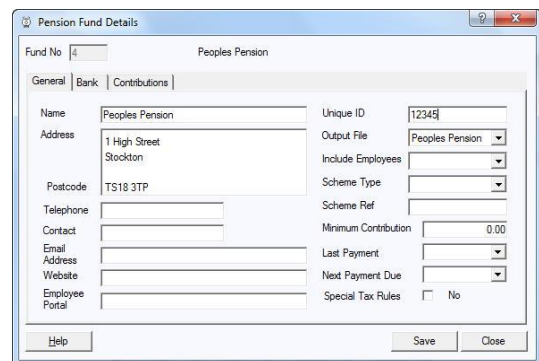
Please Note: You may have completed the Pension Fund configuration when you created the pension deductions.

1. Go to the **Pension** menu and select '**Configure Pension Fund**',
2. Select the Peoples Pension fund and click '**Edit**'
3. On the **General** tab, in the **Unique ID** field enter your B&CE account number

In the **Output File** field, select '**Peoples Pension**'

In the **Include Employees** field, select '**This fund only**'

4. Click '**Save**' and then '**Close**'



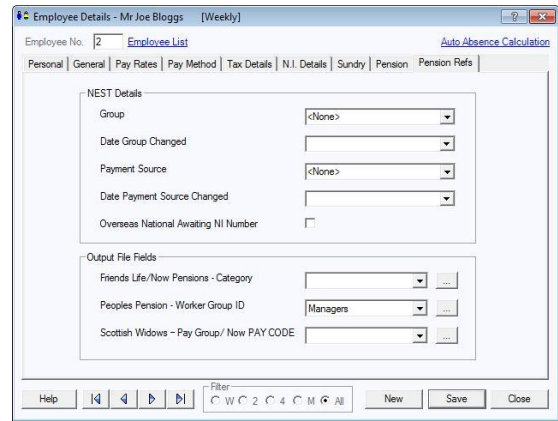
The screenshot shows the 'Pension Fund Details' window for 'Peoples Pension'. The 'Fund No' is 4. The 'General' tab is active. Fields include: Name (Peoples Pension), Unique ID (12345), Address (1 High Street, Stockton), Postcode (TS18 3TP), Output File (Peoples Pension), Include Employees (This fund only), Scheme Type, Scheme Ref, Minimum Contribution (0.00), Last Payment, Next Payment Due, and Special Tax Rules (No).

Employee Details Configuration

You will need to select the Worker Group for each employee.

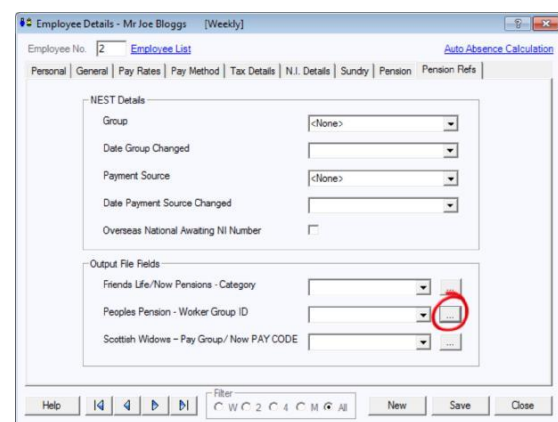
1. On the left-hand Selection Bar, select the appropriate employee to open their **Employee Details**
2. Select '**Pension Refs**' tab

- Choose the appropriate option from the **Peoples Pension – Worker Group ID** from the dropdown field.
If the field doesn't contain the appropriate Worker Group, click the icon to it. Click [here](#) for instructions
- Click **'Save'** and then click **'Close'**

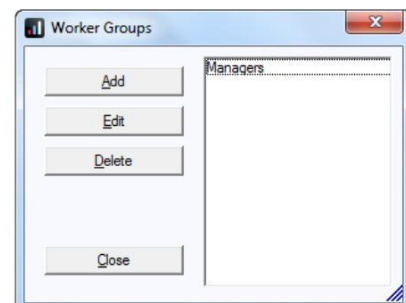


Add a Worker Group

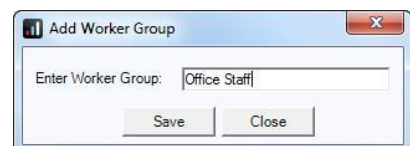
- In **Employee Details**, on the **Pension Refs** tab click the icon to the right of the **Peoples Pension – Worker Group ID** field to add a Worker Group.



- On the **Worker Groups** screen, click **'Add'** to open the **Add Worker Group** screen



- Enter the Worker Group, click **'Save'** to close the **Add Worker Group** screen



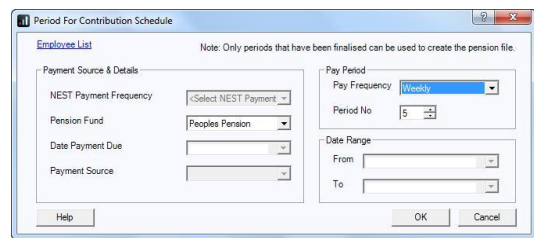
- On the **Worker Groups** screen, click **'Close'** to return to the **Employee Details** screen

Create output file

You should send an output file to People's Pension each period you have paid your employees. This file will contain joiner and contribution information.

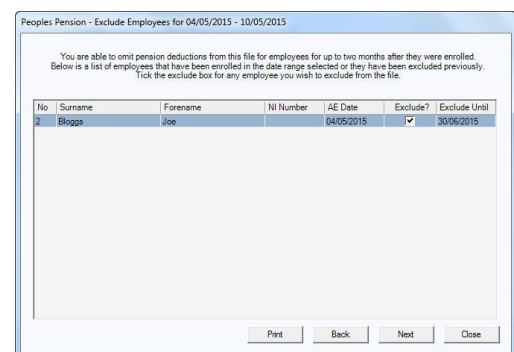
Create a Peoples Pension file:

1. Go to the **Pensions** menu and select '**Create Pension File**'
2. On the **Select File to Create** screen, choose '**Peoples Pension V8.1**'
3. Click '**OK**'
4. On the **Period for Contribution Schedule** screen, the **NEST Payment Frequency** field is disabled
5. In the **Pension Fund** field, choose your Peoples Pension fund
6. **Date Payment Due** and **Payment Source** fields are disabled
7. 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**'



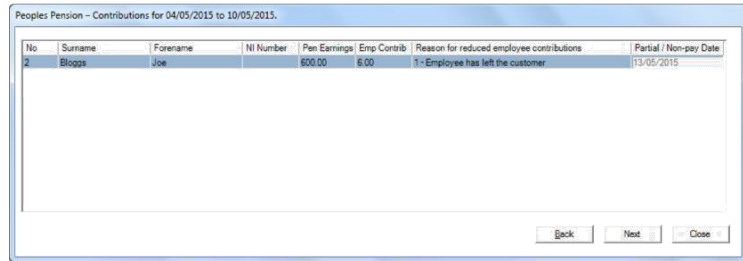
Your payroll has the ability to hold back contributions until the end of the opt-out window, as per the Pensions Regulator's advice. However, Peoples Pension prefer you don't use this option but instead send them contributions when they are deducted.

9. 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**'



No	Surname	Forename	NI Number	AE Date	Exclude?	Exclude Until
2	Bloggs	Joe		04/05/2015	<input checked="" type="checkbox"/>	30/06/2015

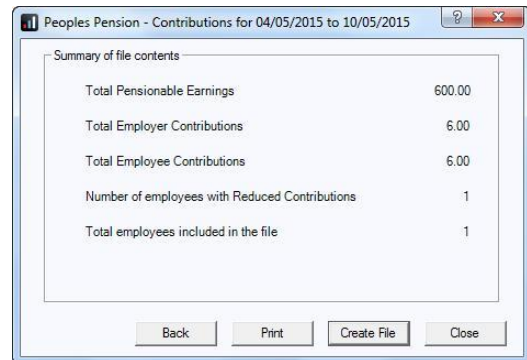
- You must inform People's Pension of any employees that didn't have a pension contribution taken or made a reduced contribution.



No	Surname	Forename	NI Number	Pen Earnings	Emp Contrib	Reason for reduced employee contributions	Partial / Non-pay	Date
2	Bloops	Joe		600.00	6.00	1 - Employee has left the customer		13/05/2015

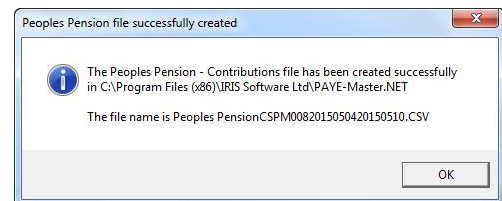
You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.

- Click **'Next'**
- On the **Peoples Pension – Contribution for...** screen, click **'Print'** to print a report of the employees that are included in the file.
- Click **'Create File'** to create the **Peoples Pension** file



Summary of file contents	
Total Pensionable Earnings	600.00
Total Employer Contributions	6.00
Total Employee Contributions	6.00
Number of employees with Reduced Contributions	1
Total employees included in the file	1

- On the **Save As** screen, choose the location where the **Contribution Schedule** file will be created and then click **'Save'**
- A message will advise the location where the **Peoples Pension** file has been created



Upload Peoples Pension file:

- Login to your Peoples Pension account on the People's Pension website
- Please refer to Peoples Pension Help facilities for more information

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