



# **Auto Enrolment Configuration Tool Guide**

**IRIS GP Payroll**

April 2018



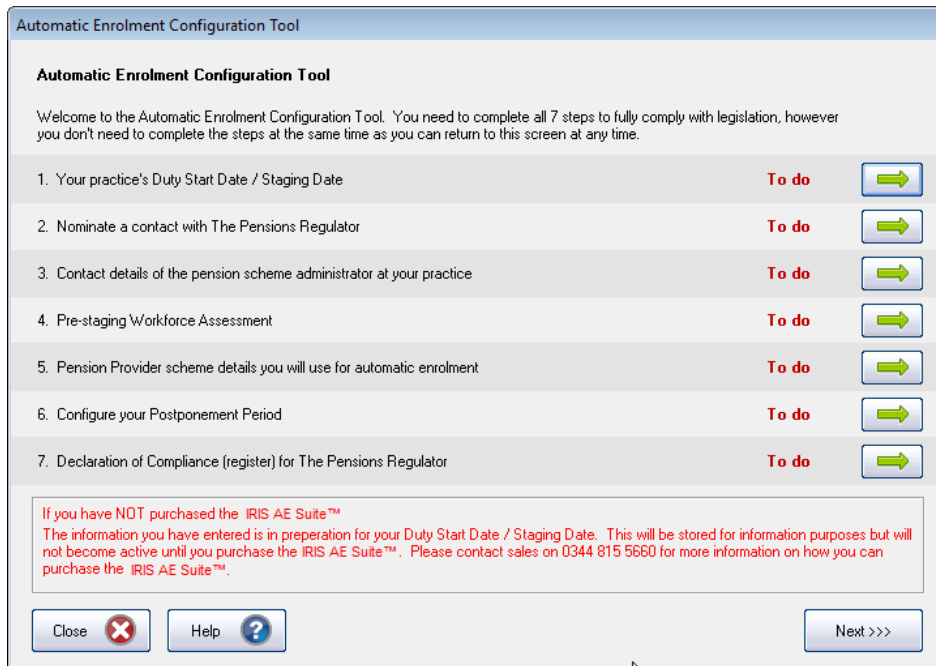
## Contents

<b>How do I set up Auto Enrolment in the payroll software? .....</b>	<b>3</b>
1. Duty Start Date / Staging Date .....	4
2. Nominate a contact with The Pensions Regulator .....	4
3. Practice Pension Scheme Administrator Details .....	4
4. Pre-staging Workforce Assessment .....	4
5. Pension Provider Details .....	4
6. Postponement Period .....	5
7. Declaration of Compliance .....	5

## How do I set up Auto Enrolment in the payroll software?

To assist you, the payroll software contains an **Automatic Enrolment Configuration Tool**, covering all the steps you need to take to configure your system.

To begin, click on **Setup/ Options | 4 – Practice Pension Details** and select **AE Configuration Tool**.



The screenshot shows a window titled "Automatic Enrolment Configuration Tool". Inside, there is a heading "Automatic Enrolment Configuration Tool" and a welcome message: "Welcome to the Automatic Enrolment Configuration Tool. You need to complete all 7 steps to fully comply with legislation, however you don't need to complete the steps at the same time as you can return to this screen at any time." Below this is a list of seven steps, each with a "To do" status and a right-pointing arrow button:

Step	Status	Action
1. Your practice's Duty Start Date / Staging Date	To do	→
2. Nominate a contact with The Pensions Regulator	To do	→
3. Contact details of the pension scheme administrator at your practice	To do	→
4. Pre-staging Workforce Assessment	To do	→
5. Pension Provider scheme details you will use for automatic enrolment	To do	→
6. Configure your Postponement Period	To do	→
7. Declaration of Compliance (register) for The Pensions Regulator	To do	→

Below the list is a red-bordered box with the following text: "If you have NOT purchased the IRIS AE Suite™ The information you have entered is in preparation for your Duty Start Date / Staging Date. This will be stored for information purposes but will not become active until you purchase the IRIS AE Suite™. Please contact sales on 0344 815 5660 for more information on how you can purchase the IRIS AE Suite™." At the bottom of the window are three buttons: "Close" (with a red X icon), "Help" (with a question mark icon), and "Next >>>" (with a right-pointing arrow icon).

These are all the steps you need to take to comply with existing legislation. You don't need to complete all of the steps at once as you can return to this screen at any time.

Use the **Previous** and **Next** buttons to navigate between the screens.

- Click on each arrow to open the relevant screen
- As you complete each step, **To do** will change to **Complete**

Please Note: You can return to the **Automatic Enrolment Configuration Tool** at any stage to make changes

Here are some further details on completing each step:

### 1. Duty Start Date / Staging Date

The date when automatic enrolment duties begin to apply to your practice. You need to meet your key duties by this date.

To find out your Duty Start Date / Staging Date, go to **The Pensions Regulator** website and enter your PAYE Reference number (e.g. 913WZ5121A).

### 2. Nominate a contact with The Pensions Regulator

You need to inform The Pensions Regulator who they need to send important communications to regarding automatic enrolment.

Click the button **Nominate a contact with The Pensions Regulator**. This takes you to the section of **The Pensions Regulator** website where you need to enter your details. You will need to enter your reference code which you will find on any letter you have received from **The Pensions Regulator**.

Click the **Mark as Complete** button to mark this step as complete.

### 3. Practice Pension Scheme Administrator Details

These should be the details of the individual in your practice who will be communicating with your pension provider on a day to day basis.

It's important to complete this section as these details are used in the pension communications sent to your employees using IRIS AE Suite™.

### 4. Pre-staging Workforce Assessment

This screen enables you to get an estimate of how many employees are likely to be automatically enrolled at your Duty Start Date / Staging Date. It is really only for your information and not a requirement.

### 5. Pension Provider Details

Your pension provider should supply you with the details you need to complete this screen. You are also able to select an existing pension scheme.

Completing this screen will create your pension deductions for you. Alternatively, if you set up your own deductions, IRIS has several guides for you [here](#) depending on your pension provider.

## 6. Postponement Period

It is possible to delay automatic enrolment assessment for up to three months at Duty Start Date / Staging Date or a new employee's Start Date.

You can also delay automatic enrolment assessment for employees who become eligible jobholders for up to three months.

Enter your postponement requirements on this screen. You will need to click the **Mark as Complete** button to mark this step as complete.

For further details on **Postponement**, click [here](#) to view the **Legislation Guide**.

## 7. Declaration of Compliance

Once you've enrolled your staff, you must complete your Declaration of Compliance with The Pensions Regulator. The declaration confirms that you've complied with your legal duties.

Even if you haven't had to enrol anyone (but had employees on your Duty Start Date / Staging Date), you still need to complete your declaration.

Click the button **Complete Declaration of Compliance (registration)** to complete this online. You can start at any time, however you cannot complete it until a month after your Duty Start Date / Staging Date (and must complete it within five months).

The payroll software provides a report, which you can print from this screen, containing much, but not all, of the information you need to complete the declaration. The Pensions Regulator's Declaration of Compliance (registration) checklist is available [here](#). When you have completed your declaration online, click the **Mark as Complete** button.

## Additional Software and Services Available

### IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider\* and generate the necessary employee communications.

### IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

### IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

### Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600	Tel: 0300 200 3200
Fax: 0844 366 7828	Tel: 0300 200 3211 (new business)
Email: helpdesk@ir-efile.gov.uk	

### Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0344 815 5700	Tel: 0344 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

### Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0344 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0344 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5671	earniesupport@iris.co.uk