Guide to NEST Integration in the Payroll Software

IRIS Payroll

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Introduction

This guide will give you an overview of how to configure your payroll to include information required to be sent to NEST. It also gives you instructions on the process you need to perform each period.

The guide covers:

- What is NEST integration?
- Configuring your payroll
- Sending information to NEST each period

What is NEST integration?

You can now send information online to NEST from within the payroll software, at the click of a button. This will inform NEST of any workers to enrol in the pension scheme and the amount of contributions taken. We have worked closely with NEST to bring you this time saving feature, which will also reduce potential errors.

NEST configuration

You only need to complete the NEST configuration process in your payroll once. The steps you need to complete are:

Admin Configuration

To enable NEST submissions in Admin:

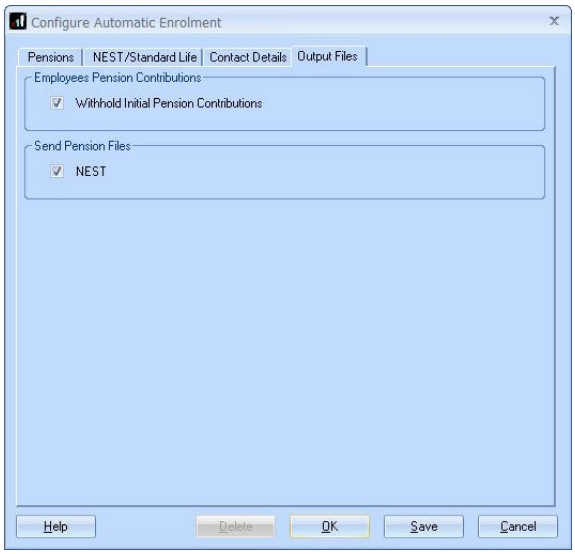
1. Log into **Admin**
2. From the **File** menu, select **Send Pension Files**

The **Send Pension Files** menu item will now be ticked.

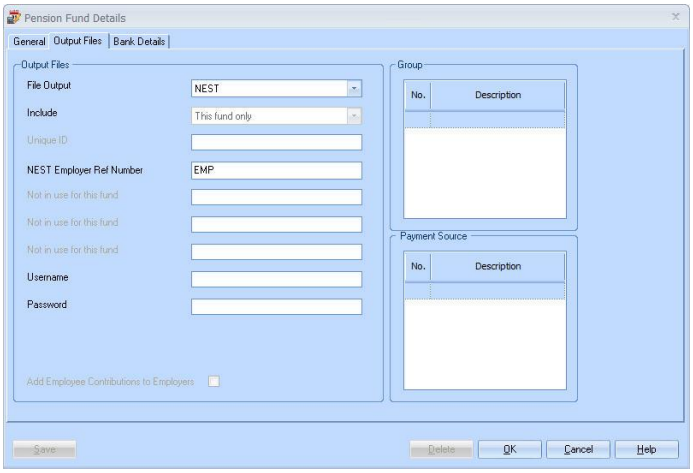
Payroll Configuration

To enable NEST submissions in payroll:

1. Log into the payroll
2. From the **Pension** tab select **Configure Auto Enrolment**
3. Open the **Output Files** tab
4. If you want to withhold contributions to NEST, during the opt-out period, tick the **Withhold Initial Pension Contributions** box. This will display the **Exclude Employees** screen during the submission to NEST process, allowing you to choose the employees for whom you want to withhold contributions



5. In the **Send Pension Files** section, tick the **NEST** box
6. Click **OK**
7. From the **Pension** tab, select **Configure Pension Fund**
8. Select your NEST pension fund and click **Edit**
9. Open the **Output Files** tab
10. Enter your NEST **Username** and **Password**. These are the Username and Password you would use to log on to NEST's website
11. Click **OK**



If you haven't already completed your **NEST Employer Ref Number**, **Group** and **Payment Source** you should do so now.

Sending files to NEST

In payroll, the process for sending information to NEST is almost the same as creating a CSV file. So, if you previously created a CSV file for NEST you will already know the processes to complete each period.

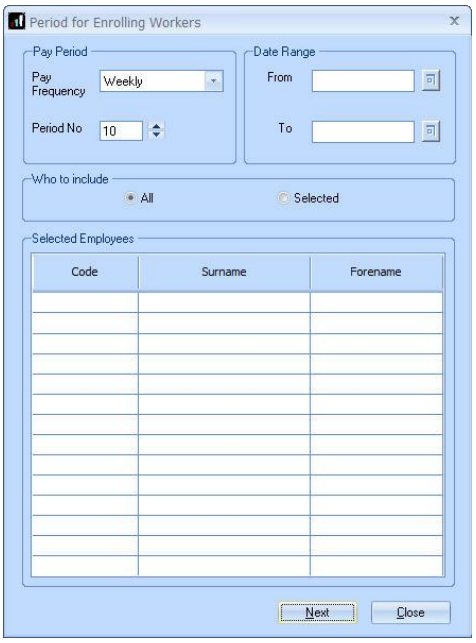
Enrolling Workers

To send Enrolling Workers information to NEST:

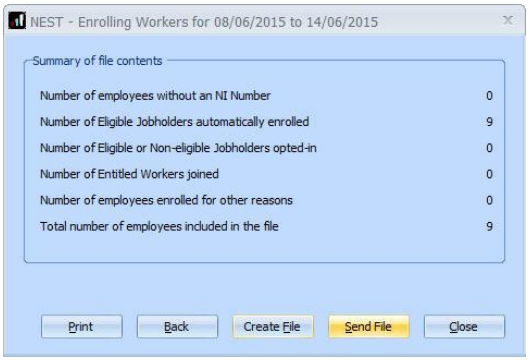
1. From the **Pension** tab, select **Create Pension File**
2. Select **NEST - Enrolling Workers**
3. Click **Next**
4. On the **Period for Enrolling Workers** screen, enter the **Pay Period** details or **Date Range**

   In the **Pay Period** section, choose the pay period employees were automatically enrolled, opted in or joined

   Alternatively, you could choose a date range to send the information for by entering the **From** and **To** dates in the **Date Range** section



5. In **Who to include**, accept the default of **All**
6. Click **Next**
7. On the **NEST – Enrolling Workers for…** screen, click **Print** to print a report of the employees that are included in the file
8. Click **Send File** to send the **NEST – Enrolling Workers** file
9. Any errors will be displayed in a grid describing why they occurred
10. Otherwise a screen will appear indicating the file is being sent to NEST
11. If the file is sent successfully, you may see a message asking you if wish to wait for a response. If you don't wish to wait, you can retrieve the response later



Contribution Schedule

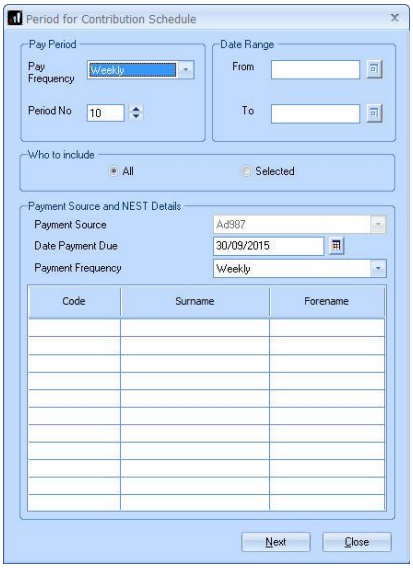
To send a Contribution Schedule to NEST:

1. From the **Pension** tab, select **Create Pension File**
2. Select **NEST – Contribution Schedule**

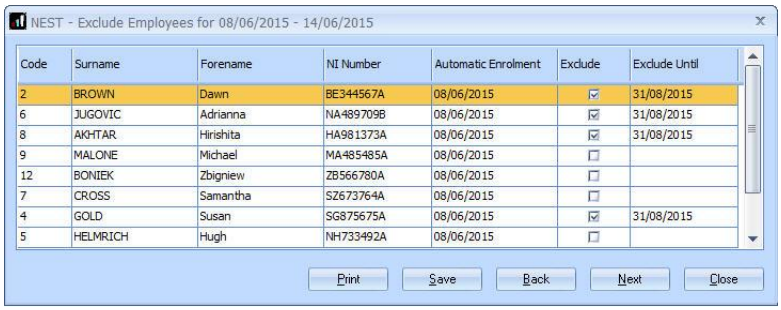
   Click **Next**
3. On the **Period for Contribution Schedule** screen, enter the **Pay Period** details or **Date Range**

   In the **Pay Period** section, choose the pay period required

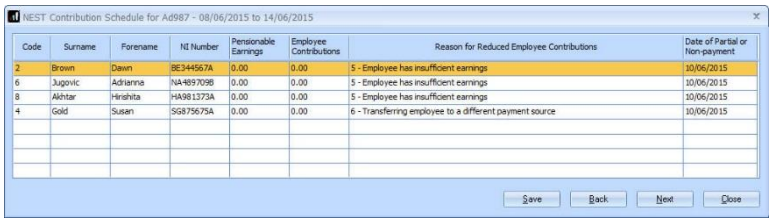
   Alternatively, you could choose a date range to send the information for by entering the **From** and **To** dates in the **Date Range** section



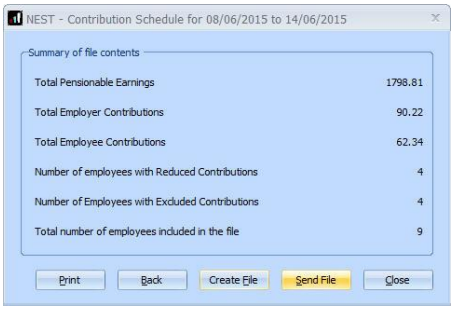
4. In **Who to include**, accept the default of **All**
5. Click **Next**
6. Select any relevant employees on the **NEST – Exclude Employees for…** screen and ensure the **Exclude Until** is complete (this screen will only appear if in **Configure Auto Enrolment | Output Files** you have ticked **Withhold Initial Pension Contributions**



7. Click **Next**
8. Select the reasons for reduced contributions if required and click **Next**



9. On the **Nest – Contribution Schedule for…** screen, click **Print** to produce a report of the employees included in the file
10. Click **Send File**
11. Any errors will be displayed in a grid describing why they occurred



12. Otherwise a screen will appear indicating the file is being sent to NEST
13. If the file is sent successfully, you may see a message asking you if wish to wait for a response. If you don't wish to wait, you can retrieve the response later

How to retrieve a response from NEST

1. From the **Pension** menu, select **Retrieve Response**

   - If it is a single file, the next screen displayed will be for success or failure
   - If several files are waiting, the **Retrieve Response for Pending Submissions** screen will open
   - Two options, **Retrieve** and **Retrieve All** are available on this screen, allowing you to retrieve responses from NEST for a single selected file or for all listed files

2. Select either **Retrieve** or **Retrieve All** and a progress bar 'Retrieving Response from NEST' will be displayed. You can click **Cancel** at any time to stop the process

3. The next screen displayed is **Retrieve Files from NEST – File Status**. This screen shows the outcome of the retrieval process and the **Status** could be one of the following:

   - **Success** – the file has been successfully validated by NEST

     From this screen you can highlight a row and click **View**. For example, here you could view successfully enrolled workers with Employee Code; Surname and NI Number or a successful contributions schedule file detailing the total pension contributions

   - **Partial** – the file submission was only partially successful and there were some failures

     If the submission was a **Partial** success, the screen will display the successfully enrolled workers and you can click **View** to see the errors that were detected. If you view a **Partial Contributions Schedule**, the value is the sum of all contributions that were successfully uploaded and does not include rejected records *

   - **Fail** – the file submission was unsuccessful *
   - **Not Ready** – the response is not yet ready
   - **No Response Received** – the process was cancelled before a response was requested

* Click **Print** when viewing the **Errors** detected if you require a hard copy.

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 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 Tel: 0300 200 3211 (new business)

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0844 815 5700 Email: sales@iris.co.uk	Tel: 0844 815 5677 Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk

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