

IRIS GP Payroll

Guide to NEST Integration
in the Payroll Software

April 2020

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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 pay period.

The guide covers:

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

What is NEST integration?

You can 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:

Enable NEST submissions



Enter your NEST Username and Password

To enable NEST submissions:

1. Log into the payroll
2. In **Setup/ Options | Practice Pension Details | Auto Enrolment Details | Pension Fund Details | Pension Output File Details**, enter your NEST Username and Password

The **Username** and **Password** fields will only be enabled if **Output File** is set to **NEST**.

These are the Username and Password you would use to log on to NEST's website

3. Click **OK**
4. Go to **Setup/ Options | 4 - Practice Pension Details | Auto Enrolment Details | Pension Output File Options**

5. Choose the **Output Files** tab
6. 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

7. In the **Send Pension Files** section, tick the **NEST** box
8. Click **OK**

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 **Setup/ Options | 4 – Practice Pension Details | Auto Enrolment Details**, select **Create Pension Output File**
2. Select **NEST - Enrolling Workers**
3. Click **OK**

On the **Period for Enrolling Workers** screen, enter the **Month No** or **Date Range**. 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

4. In **Who to include**, accept the default of **All**
5. Click **Next**
6. On the **NEST – Enrolling Workers for...** screen, click **Print** to print a report of the employees that are included in the file
7. Click **Send File** to send the **NEST – Enrolling Workers** file
8. Any errors will be displayed in a grid describing why they occurred
9. Otherwise a screen will appear indicating the file is being sent to NEST
10. 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

Period for Enrolling Workers

Date Range

Select a month number or date range to be included in the file

Month No. 1

From

To

Number of Employees

All

Choose Employees

Highlight the employees you wish to include in the file

Next >>>

Cancel

Help

NEST - Enrolling Workers for 01/04/2016 to 30/04/2016

Summary of file contents

Number of employees without an NI Number	0
Number of Eligible job holders automatically enrolled	1
Number of Non-Eligible jobholders opted in	0
Number of Entitled workers opted in	0
Number of employees enrolled for other reasons	0
Total number of employees included in file	1

Print

Create File

Send File

<<< Back

Cancel

Help

Contribution Schedule

To send a Contribution Schedule to NEST:

1. From **Setup/ Options | 4 – Practice Pension Details | Auto Enrolment Details**, select **Create Pension Output File**
2. Select **NEST – Contribution Schedule**
3. Click **Next**

4. On the **Period for Contribution Schedule** screen in the **Date Range** section, enter the **Month No** details or **Date Range** by entering the **From** and **To** dates

5. In **Number of Employees**, accept the default of **All**
6. Enter the **Date payment due** and **NEST Payment Frequency**

7. Click **Next**

8. 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 **Setup/ Options | 4 – Practice Pension Details | Auto Enrolment Details | Pension Output File Options | Output Files** tab you have ticked **Withhold Initial Pension Contributions**)

NEST - Exclude employee for 01/04/2016 - 30/04/2016

Surname	Forename	NI Number	AE Date	Exclude?	Exclude Until
Normal	Nigella	NH010171A	01/04/2016	<input checked="" type="checkbox"/>	31/07/2016
Bloggs	James	NP987654C	01/04/2016	<input type="checkbox"/>	

Buttons: Cancel, Help, Print, <<< Back, Next >>>

9. Click **Next**

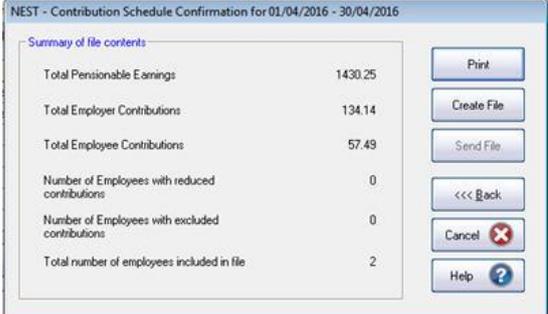
10. Select the reasons for reduced contributions if required and click **Next**

NEST - Contribution Schedule for Payment Source PS1 - 01/05/2016 to 31/05/2016

Employee Code	Surname	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions	Date of partial or non-payment
23	Smith	Jack	NA232322A	0.00	0.00	5 - Employee has insufficient earnings	31/05/2016

Buttons: Cancel, Help, <<< Back, Next >>>

11. On the **Nest – Contribution Schedule for...** screen, click **Print** to produce a report of the employees included in the file
12. Click **Send File**
13. Any errors will be displayed in a grid describing why they occurred
14. Otherwise a screen will appear indicating the file is being sent to NEST
15. 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



Summary of file contents	
Total Pensionable Earnings	1430.25
Total Employer Contributions	134.14
Total Employee Contributions	57.49
Number of Employees with reduced contributions	0
Number of Employees with excluded contributions	0
Total number of employees included in file	2

Buttons on the right: Print, Create File, Send File, <<< Back, Cancel (X), Help (?)

All xml files sent between GP Payroll and NEST will be saved in the Pen Comms folder. This is in the Program folder where the software is installed.

Every file sent to NEST will be saved in the Pen Comms/NEST/Requests folder and all files received from NEST in the Pen Comms/NEST/Responses folder.

How to retrieve a response from NEST

1. From **Setup/ Options | 4 – Practice Pension Details**, select **Auto Enrolment Details**
2. Click **Pension Output File Options** then from the **Output Files** tab 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
3. 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
4. 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.

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	For IRIS Payroll Professional
Tel: 0344 815 5656	Tel: 0344 815 5676	Tel: 0345 057 3708
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk	Email: payrollsales@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 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
IRIS Payroll Professional (formerly Star)	01273 715300	payroll-support@iris.co.uk

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