

IRIS Payroll

Guide to NEST Integration in
the Payroll Software

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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:

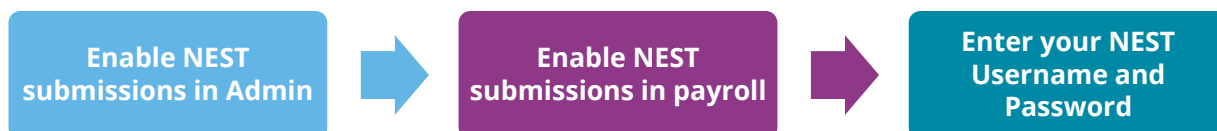
- What is NEST integration?
- Configuring your payroll
- Sending information to NEST each period

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:

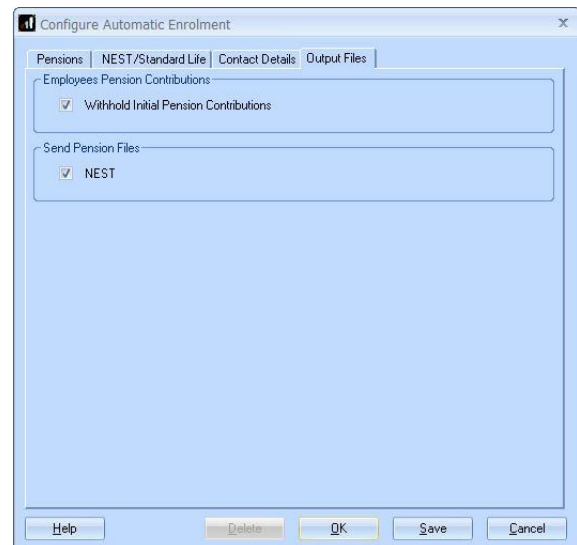
1. Log into **Admin**
2. From the **File** menu, select **Send Pension Files**

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

Payroll Configuration

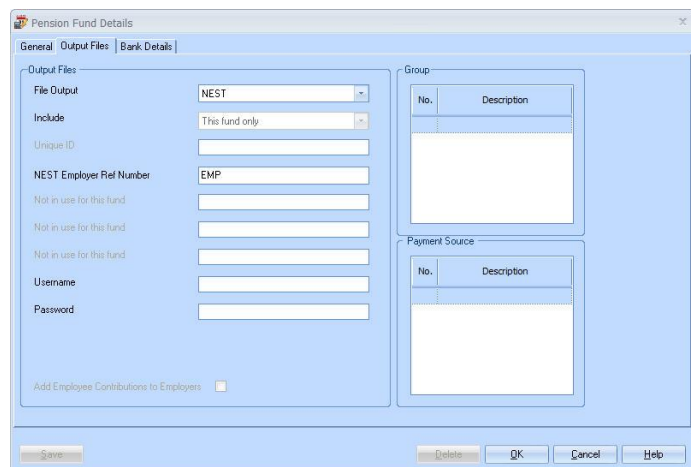
To enable NEST submissions in payroll:

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 onto 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.

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

Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude Until
2	BROWN	Dawn	BE344567A	08/06/2015	<input checked="" type="checkbox"/>	31/08/2015
6	JUGOVIC	Adrianna	NA489709B	08/06/2015	<input checked="" type="checkbox"/>	31/08/2015
8	AKHTAR	Hirishita	HA981373A	08/06/2015	<input checked="" type="checkbox"/>	31/08/2015
9	MALONE	Michael	MA485485A	08/06/2015	<input type="checkbox"/>	
12	BONIEK	Zbigniew	ZB566780A	08/06/2015	<input type="checkbox"/>	
7	CROSS	Samantha	SZ673764A	08/06/2015	<input type="checkbox"/>	
4	GOLD	Susan	SG875675A	08/06/2015	<input checked="" type="checkbox"/>	31/08/2015
5	HELMRICH	Hugh	NH733492A	08/06/2015	<input type="checkbox"/>	

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**

Code	Surname	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions	Date of Partial or Non-payment
2	Brown	Dawn	BE344567A	0.00	0.00	5 - Employee has insufficient earnings	10/06/2015
6	Jugovic	Adrianna	NA489709B	0.00	0.00	5 - Employee has insufficient earnings	10/06/2015
8	Akhtar	Hirishita	HA981373A	0.00	0.00	5 - Employee has insufficient earnings	10/06/2015
4	Gold	Susan	SG875675A	0.00	0.00	6 - Transferring employee to a different payment source	10/06/2015

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

Summary of file contents	
Total Pensionable Earnings	1798.81
Total Employer Contributions	90.22
Total Employee Contributions	62.34
Number of employees with Reduced Contributions	4
Number of Employees with Excluded Contributions	4
Total number of employees included in the file	9

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 receive responses from NEST for a single selected file or 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.

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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