



IRIS Payroll

NOW Pension File Creation

April 2020

IRIS. Look forward

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Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Now: Pensions output file. You can create output files for Now: Pensions to enrol workers and inform them of the contributions taken.

The guide covers:

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

Now Pensions Configuration

Now Pensions require you to supply your ER Code, Scheme Code and Pay Code in each output file.

Pension Fund configuration

1. Select **Pension | Configure Pension Fund**
2. Choose the Now pension fund and click **Edit**
3. Select the **Output Files** tab
4. In the **Include Employees** field, select **This fund + no fund**
5. Enter your **ER Code**, **Scheme Code** and **Pay Code**
6. Click **OK**

The screenshot shows the 'Create Pension Fund Details' dialog box with the 'Output Files' tab selected. The 'File Output' dropdown is set to 'Now Pensions'. The 'Include' dropdown is set to 'This fund + no fund'. The 'ER Code' field is empty. The 'NEST Employee Ref Number' field contains 'EMP'. The 'Scheme Code' and 'Pay Code' fields are empty. There are three 'Not in use for this fund' checkboxes, all of which are unchecked. The 'Add Employee Contributions to Employees' checkbox is also unchecked. On the right, there are two tables: 'Group' with one row (No. 1, Description Group 1) and 'Payment Source' with one row (No. 1, Description Bank 1). At the bottom, there are buttons for 'Save', 'Delete', 'OK', 'Cancel', and 'Help'.

Employee Details configuration

You only need to enter the **Scheme Code** and **Pay Code** for an employee if they have a different one to that configured in the Pension Fund.

1. On the left-hand Selection Bar, double-click on the appropriate employee to open their **Employee Details**
2. Select the **Pay Elements** tab then **Pension Refs**
3. Choose the appropriate **Scheme Code** and **Pay Code** from the drop-down fields
4. Click **Save** and **Close**

The screenshot shows the 'Employee Details - Akhtar Hirishita' window with the 'Pension Refs' tab selected. The 'Surname' field contains 'Akhtar' and the 'Code' field contains '8'. The 'Forename 1' field contains 'Hirishita' and the 'Department' field contains 'Cashier'. The 'NEST Details' section has 'Group' set to 'Group 1' and 'Payment Source' set to 'Bank 1'. The 'Date Group Changed' and 'Date Payment Source Changed' fields are empty. The 'Overseas National Awaiting NI Number' checkbox is unchecked. The 'Now Pensions Output File Fields' section has 'Scheme Code' set to 'JKLM', 'Not in use for this fund' set to an empty field, and 'Pay Code' set to '5678'. At the bottom, there are buttons for '<<', '<', '>', '>>', 'Get Out', 'Save', 'Close', and 'Help'.

You can create new options in the **Scheme Code** and **Pay Code** drop-down field by typing directly into the field and clicking **Save**.

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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