Earnie™

Release Notes & Patch

April 2021

Contents

Earnie™ April 2021 Patch 2 Release 1.36.0.*

National Minimum & National Living Wage Report

The National Minimum & National Living Wage Report has been updated to reflect the legislation changes in April 2021.

HR Integration Normal Hours Worked

The **Employee Details |Salary | Working Hours | Contacted Hours per week** field now updates when importing from HR.

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myePayWindow

Email and Phone No Fields

The **Company | Alter Company Details | Client Contact Details** tab will now be visible for all licenced versions of the payroll software. The **Name** and **Company Address** fields will be populated from the information held in the **Company** tab. If blank in the **Client Contact Details** tab, the **Email Address** and **Telephone Number** fields will be populated from the **Online Services** tab.

When sending data to myePayWindow, the **Telephone Number** and **Email Address** will be used from the data held on the **Company | Alter Company Details | Client Contact Details** tab.

Payslips

The following payslip issues when uploading to myePayWindow have been resolved:

Statutory Payments on Payslips

Statutory payments being duplicated as an 'other payment' value on payslips.

Zero rates added to Payslips

Payslips will no longer include zero rates. This was occurring when a rate had been attached to an employee, but no rates had been processed through the payroll.

Rounding in Other Payments

Factor/rates were rounding half pennies as 0.01 in 'Other Payments'.

Actual Pay YTD

Actual Pay YTD was being uploaded instead of Net Pay YTD.

NI Adjustment on Payslips

NI adjustment values were not being displayed on payslips.

Blank Payslips

Blank payslips were uploading to myePayWindow.

Ers YTD Pension

When Display Items are not selected to appear on payslips (under Report Options) and an ERs pension is hidden from a payslip (Display Item Only – Hidden from Payslip), the Ers YTD amount was showing as £00.00.

Initial Holiday Values

Initial holiday values not being uploaded on payslips in myePayWindow.

Extension to date to move to myePayWindow

To assist our clients, we have extended the date for users of IRIS OpenPayslips/OpenEnrol to switch to myePayWindow, giving them until 31st January 2022. After this date they will be unable to publish to IRIS OpenPayslips/OpenEnrol.

National Minimum & National Living Wage

National Minimum & National Living Wage Warning

An issue where the National Minimum Wage and National Living Wage warning was not being triggered by an employee's birth date has been resolved.

Furlough Extension

The software/spreadsheet has been updated to incorporate the extension of the CJRS until 30th September 2021.

Please see the COVID-19 – Furlough Job Retention Scheme Changes and Important Dates Guide for further information.

Default Student Loan

Previously, when a new employee had more than one student loan selected in the Starter Checklist, the software assigned the lowest number by plan type. We have updated the software and it will now assign the number based on the lowest annual threshold of the selected loans.

Using Last Year's Data

An error 3265, Item not found in this collection, experienced when using the Last Year's Data option has been resolved.

Earnie^{TM} April 2021 Release 1.36.0.141

Release Notes

Welcome to your software update for April 2021. This update of the software includes some new features and enhancements, together with any necessary legislative changes. These notes provide information on all the improvements to the software. For detailed information on legislative changes, click **here**. If you encounter any difficulties, please visit: **www.iris.co.uk/contactus**

PAYE Legislation Changes

- The rates and bands in the software, for tax, National Insurance, Statutory Payments, Student Loans, Minimum Wage etc., have been updated for 2021/2022
- During the **Year-end Restart**, the software will uplift tax codes, if required
- The AE Parameters have been updated in line with legislation for 2021/2022
- P60 forms have been updated to report for year end 2020/2021

Student Loan Thresholds

The annual thresholds have been updated in line with legislation for 2021/2022:

- Plan Type 1 increased from £19,390 to £19,895
- Plan Type 2 increased from £26,575 to £27,295
- Plan Type 4 is new for April 2021 and has a threshold of £25,000
- Postgraduate Student Loans remains at £21,000

Updates for NMW/NLW 2021/2022

System Parameters

HMRC have revised the **National Minimum Wage (NMW)** and the **National Living Wage (NLW)** age brackets and rates for the tax year 2021/2022. Following these changes, we have updated the software to perform checks using the new parameters. The table below details the NLW/NMW ages and rates for April 2020, and the amended figures for April 2021.

National Minimum & Living Wage – Age	Rate from April 20	National Minimum & Living Wage – Age	Rate from April 21
25 and over	£8.72	**23 and over**	£8.91
21–24	£8.20	**21–22**	£8.36
18–20	£6.45	**18–20**	£6.56
16–17	£4.55	**16–17**	£4.62
Apprentice Rate	£4.15	**Apprentice Rate**	£4.30

Note: The system does not make automatic rate changes for employees. It only checks the rates and ages are the correct parameters for the tax year. It is your responsibility to change them. Before updating the software, if you have entered your own rates on the **Admin | File | Companies | Minimum/Living Wages Rates** screen with a date later than 1 April 2021, the system will not overwrite these figures, you will need to change them manually.

Reports

We have updated all reports in line with the new NMW and NLW parameters.

Starter Checklist Process Amendments

Starter Checklist

In light of changes made by HMRC to the Starter Checklist, on the **Employee Details | Tax/NI | Starter Details | New Starter** tab, we have renamed the **Present Circumstances** frame to **Student Loans and Postgraduate Loan** and replaced the Student Loan option with **Plan 1, Plan 2, Plan 4** and **Postgraduate Loan** tick boxes. This allows you to select one or multiple Plans for new employees.

Also, on the **Expat** tab, we have replaced the **UK Student Loan** field with the following new tick boxes:

    a.   **UK Student Loan Plan 1**

    b.   **UK Student Loan Plan 2**

    c.   **UK Student Loan Plan 4**

    d.   **UK Postgraduate Loan**

Note: When selecting multiple Plans, for example, **Plans 2** and **4**, the student loan will deduct from the lowest numbered Plan. In this instance, it would be **Plan 2**.

Statements **A**, **B** and **C** have been updated in line with HMRC requirements. The new statements are:

- **Statement A**: "Do not choose this statement if you're in receipt of a State, Works or Private Pension. Choose this statement if the following applies. This is my first job since 6 April and since the 6 April I've not received payments from any of the following:
  - Jobseeker's Allowance
  - Employment and Support Allowance
  - Incapacity Benefit"
- **Statement B**: "Do not choose this statement if you're in receipt of a State, Works or Private Pension. Choose this statement if the following applies. Since 6 April I have had another job but I do not have a P45. And/or since the 6 April I have received payments from any of the following:
  - Jobseeker's Allowance
  - Employment and Support Allowance
  - Incapacity Benefit"
- **Statement C:** "Choose this statement if:
  - you have another job and/or
  - you're in receipt of a State, Works or Private Pension"

On the **Starter** Checklist we have added a new frame, **Transfer from Another Payroll System**. We have also renamed the following fields:

- **This is not a new employee** has been renamed **This is not a new starter to the PAYE Scheme**
- **Previous Employee Code** tick box has been changed **to Previous Employee Code/RTI Pay ID**

Starter Checklist Reports

We have updated the **New Starter Reports** to match the layout provided by HMRC.

New Student Loan Plan Type 04 Scotland

Employee Details Student Loan Plan Type

Following the introduction of **Student Loan Plan Type 04 Scotland** which has a threshold of £25,000 and a 9% deduction rate for tax year 2021/2022 onwards, on the **Employee | Employee Details | Tax/NI | Student Loan** button, we have added the number **4** to the **Plan Type** drop-down menu.

HMRC determines who should be on **Plan Type 04**, and they will issue instructions in the usual way through the DPS.

Payroll Calculations

Although the threshold differs when calculating **Student Loan Plan Type 4**, there is no change to the rate or method when calculating student loan deduction.

Example

Plan Type 4 (using 2021/2022 monthly thresholds)

Student Loan Plan Type	4
NIable Pay	2,500
Annual Threshold	25,000
Monthly Threshold	2083.33
Deduction Rate	9%
Student Loan Deduction	2,500 – 2,083.33 * 9% = £37 (rounded down to nearest £)

Conversion

Conversion has been updated to include the new student loan plan type.

Print Tax/NI/Pension Rates

We have updated **File | Print Tax/NI/Pension** to include the new threshold for **Student Loan Plan Type 04**.

Import/Export

We have added **Student Loan Plan Type 04** to the **Import/ Export** fields.

Audit

We have added **Student Loan Plan Type 04** to the **Audit**.

RTI

RTI submissions have been updated to include all Student Loan Plan Types. **The FPS Student Loan Year to-date** value will be a combination of **Plan Type 01**, **02** and **04** deductions where all, or either, have existed in the current year.

HR Integration

Student Loan Plan Type 04 will process through **HR Integration**.

RTI

Earlier Year FPS Menu Item

Following updates to the software, it is now possible to send a Full Payment Submission (FPS) for a previous tax year and after 19th April in the current tax year. From 2020/2021 onwards, you can no longer send an Earlier Year Update (EYU) to correct any mistakes made in the previous tax year. To enable you to submit an Earlier Year FPS, on the **Online Services** tab, we have added a new menu item, **Send Earlier Year FPS.**

Note: The **Send Earlier Year FPS** menu item will only be visible in the software from the 2020/2021 tax year and can only be used from 2021/2022 and subsequent tax years to correct data from the previous year.

Earlier Year Update

We have removed the EYU menu item from the tax year 2020/2021 and onwards. You can only send an EYU for submissions up to Tax Year 2019/2020.

Earlier Year FPS Employee Selection

On the **Online Services | Send Earlier Year FPS | Earlier Year FPS – Employee Selection** screen, we have added a **New Employee** button, enabling you to proceed to the next screen without selecting an employee.   This allows you to send an Earlier Year FPS where a company is new to Earnie and has no knowledge of employees that left whilst on another payroll system.

Sending an Earlier Year FPS for a new employee on your payroll system:

1. Go to **Online Services | Send Earlier Year FPS | Earlier Year FPS – Employee Selection**

2. Select **New Employee**

3. An **Earlier Year FPS - Year Selection** screen will display, choose the relevant **Tax Year** from the drop-down

Note: The default tax year will be your company's current tax year minus one, so if the tax year is 2023/2024, the default tax year will display as 2022/2023. However, you can still select tax years 2020/2021, 2021/2022 and 2022/2023.

4. **Earlier Year FPS – Employee Details** screen will appear. The screen has a **Personal** frame with the following fields:

   - **FPS Pay ID** – you must enter the Pay ID used previously for this employee, if it is not known, enter a new, exclusive one and tick the **Pay ID changed** box
   - **Pay ID Changed**
   - **Level**
   - **Surname**
   - **Forename 1**
   - **Forename 2**
   - **NI Number**
   - **Birth Date**
   - **Date Left**
   - **Gender**

   The **Address** frame has the fields:

   - **Postcode**
   - **Country**

   The **Payment Details** screen has two fields:

   - **Pay Frequency**
   - **Pay Date**

5. Select **Next** to open the **Earlier Year FPS - Data Entry** screen. Enter and amend the data fields required for inclusion in the Earlier Year FPS

6. The screen contains several frames and fields, including a **Submission** frame with a **Submission Type** field

The **Tax** frame has the following fields:

- **Tax Code**
- **Week1/Month1**
- **Taxable Gross**
- **Tax Paid**
- **Student Loan**
- **Postgraduate Loan**

The **Sundry** frame includes the fields:
- **Gross Pension Deductions**
- **Net Pension Deductions**
- **Benefits Taxed in Payroll**
- **Annual Occupational Pension**

The **National Insurance** frame contains the fields:
- **NI Rate**
- **Niable Gross**
- **Employee's**
- **Employer's**
- **At LEL**
- **LEL to PT**
- **PT to UEL**

The **Statutory Payments** section includes the fields:
- **Statutory Maternity Pay**
- **Statutory Adoption Pay**
- **Statutory Paternity Pay**
- **Shared Parental Pay**
- **Shared Bereavement Pay**

Note: The **Shared Parental Bereavement Pay** field will not be visible unless the Earlier Year FPS is for tax year 2020/2021 or onwards.

7. If required, from the **Earlier Year FPS - Data Entry** screen, select the **Multiple NICs** button and the **Earlier Year FPS – Multiple NI Rates** screen will display. Make the necessary amendments to the following fields:

   - **NI Rate**
   - **Niable Gross**
   - **Employees**
   - **Employer**
   - **At LEL**
   - **LEL to PT**
   - **PT to UEL**
   - **Current Rate**
   - **Previous rate**
   - **Oldest Rate**

8. Click **Print** if you require a hard copy of the information

9. Then select **Next**

10. The **Earlier Year FPS Confirmation Screen** allows you to see your Earlier Year FPS before submitting it to HMRC. **Note**: The National Insurance section will show up to four sets of data. If only one NI rate has been used in the year, only one set of data will display

11. Again, click **Print** if you require a hard copy of the data

12. Choose **Send** to submit to HMRC

Sending an Earlier Year FPS for an Existing Employee

1. Go to **Online Services | Send Earlier Year FPS | Earlier Year FPS – Employee Selection**

2. A new **Earlier Year FPS – Year Selection** screen will display. Choose the **Tax Year** from the drop-down

3. An **Earlier Year FPS - Data Entry** screen will open. Enter and amend the data fields required for inclusion in the Earlier Year FPS

4. If required, from the **Earlier Year FPS Data Entry screen**, choose the **Multiple NICs** button to navigate to the **Earlier Year FPS – Multiple NI Rates** screen. Make the necessary amendments to the fields

5. Click **Print** if you require a hard copy of the information

6. Then select **Next**

7. The **Earlier Year FPS Confirmation** screen allows you to see your Earlier Year FPS before submitting it to HMRC. **Note**: The National Insurance section will show up to four sets of data. If only one NI rate has been used in the year, only one set of data will display

8. Again, click **Print** of you require a hard copy of the data

9. Choose **Send** to submit to HMRC

Pending

To check whether you have any outstanding FPS submissions, from the **Earlier Year FPS – Data Entry** screen, click the **Pending** button (will be disabled if none are outstanding) to complete either a Normal or an Earlier Year FPS submission.

RTI

FPS Changes for 2021/2022

The **FPS** schema has been updated for tax year 2021/2022 in line with government legislation.

EPS Changes for 2021/2022

We have updated the **EPS** schema for submissions relating to tax year 2021/2022.

On the **Company | Alter Company Options | State Aid | De Minimis State Aid** screen, we have renamed the **Industrial** field to **Industrial/Other**.

Pensions

- The LGPS Bands for England/Wales and Scotland have been updated for 2021/2022
- Teachers' Pension tiers have been updated for 2021/2022

Other Improvements

P60 Layouts

We have updated the P60s for year-end 2020/2021 and to include **Statutory Parental Bereavement Pay** (SPBP).

Cater for Diesel Meets RDE2 Regulation from the Car Database

To ensure the Cash Equivalent employee car values are calculated against the correct table value/percentages when creating/amending a company car, we have set the **Euro Standard** field to **6d (temp)'** or '**6d' entries** to Fuel Type = Diesel Meets RDE2 Regulation in the software.

myPayWindow Audit

From **Company | myePayWindow Audit form**, we have added a **Print** button.

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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)

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