

IRIS PAYE-Master

Guide to creating Now output file

23/06/2015



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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 an 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. You enter the ER Code on the **Configure Pension Fund Details** screen, Scheme Code and Pay Code are entered on the **Employee Details** screen.

Pension Fund Configuration:

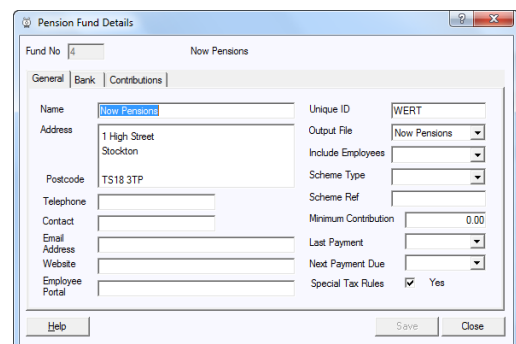
Please Note: You may have completed the Pension Fund configuration when you created the pension deductions.

1. Go to the **Pensions** menu and select '**Configure Pension Fund Details**'
2. Select the Now Pensions fund and click '**Edit**'
3. On the **General** tab, enter your ER Code in the **Unique ID** field

In the **Output File** field, select '**Now Pensions**'

In the **Include Employees** field, select '**This fund only**'

4. Click '**Save**' and then '**Close**'



Employee Details Configuration

You will need to select the **Scheme Code** and **Pay Code** for each employee.

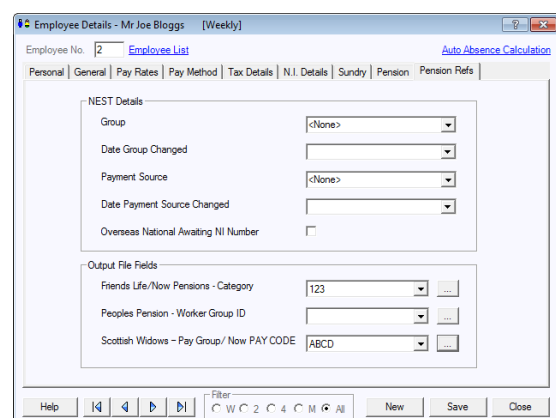
1. On the left-hand Selection Bar, select the appropriate employee to open their **Employee Details**
2. Select '**Pension Refs**' tab
3. For 'Scheme Code', choose the appropriate option from the **Friends Life/Now Pensions - Category** dropdown field.

If the field doesn't contain the appropriate Scheme Code, click the icon to add it. Click [here](#) for instructions

4. For 'Pay Code', choose the appropriate option from the **Scottish Widows - Pay Group/Now PAY CODE** dropdown field.

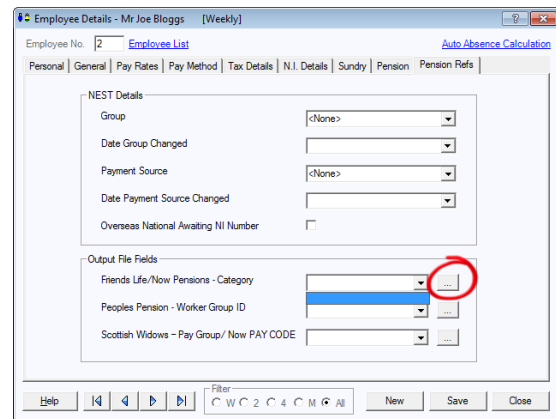
If the field doesn't contain the appropriate Pay Code, click the icon to add it. Click [here](#) for instructions

5. Click '**Save**' and then click '**Close**'

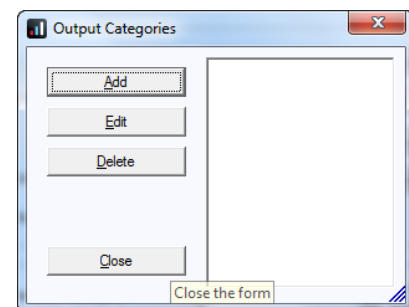


Add a New Pensions Scheme Code

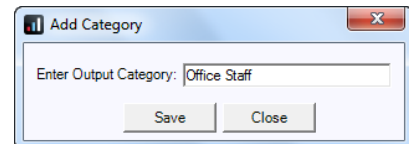
1. In **Employee Details**, on the **Pension Refs** tab click the icon to the right of the **Friends Life/Now Pensions Category** field to add a Scheme Code.



2. On the **Output Categories** screen, click 'Add' to open the **Add Category** screen



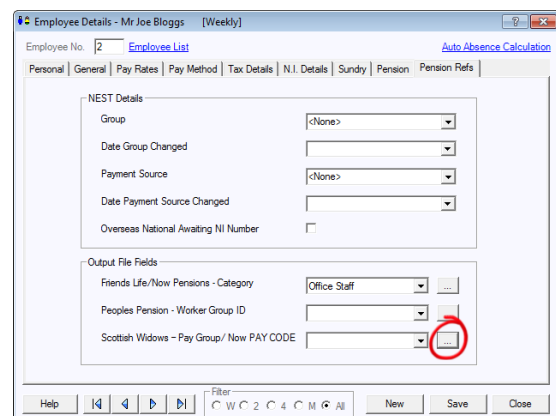
3. Enter the Scheme Code, click 'Save' to close the **Add Category** screen



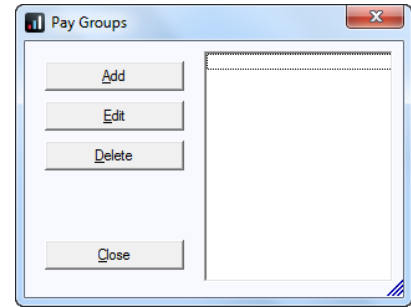
4. On the **Output Categories** screen, click 'Close' to return to the **Employee Details** screen

Add a New Pensions Pay Code

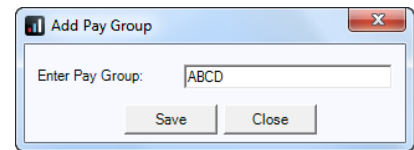
1. In **Employee Details**, on the **Pension Refs** tab click the icon to the right of the **Scottish Widows - Pay Group/Now PAY CODE** field to add a Pay Code.



2. On the **Pay Groups** screen, click '**Add**' to open the **Add Pay Groups** screen



3. Enter the Pay Code, click '**Save**' to close the **Add Category** screen



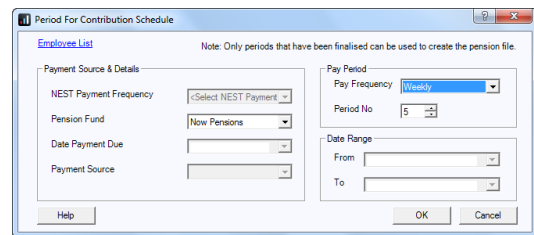
4. On the **Pay Groups** screen, click '**Close**' to return to the **Employee Details** screen

Create Output File

You should send an output file to Now Pensions: each period you have paid your employees. This file will contain joiner and contribution information.

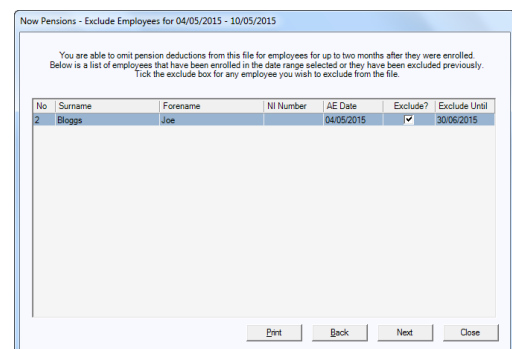
Create a Now: Pensions output file:

1. Go to the **Pensions** menu and select '**Create Pension File**'
2. On the **Select File to Create** screen, choose '**Now Pensions V1.2**'
3. Click '**OK**'
4. On the **Period for Contribution Schedule** screen, the **NEST Payment Frequency** field is disabled
5. In the **Pension Fund** field, choose your Now Pensions fund
6. **Date Payment Due** and **Payment Source** fields are disabled
7. Choose the **Pay Frequency** and **Period No** you processed the payroll for and had employees and/or employer pension contributions taken. Only periods that have been finalised can be used to create the pension file.
Date Range fields will be disabled
8. Click '**OK**'



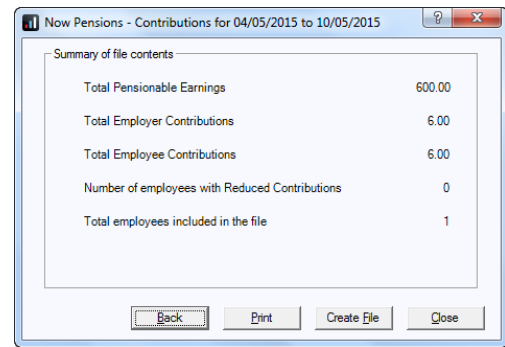
Your payroll has the ability to hold back contributions, until the end of the opt-out window, as per the Pensions Regulator's advice. However, you should check with Now Pensions to see if they permit this option.

9. Tick the box in the '**Exclude**' column to exclude an employee from the file. This will hold back the employee's contributions until the date entered in the **Exclude Until** column.
10. Click '**Next**'

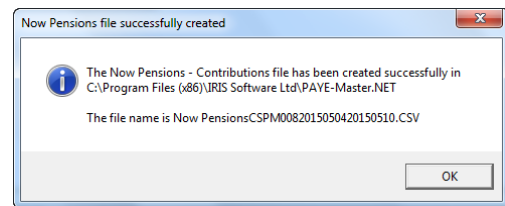


No	Surname	Forename	NI Number	AE Date	Exclude?	Exclude Until
2	Bloggs	Joe		04/05/2015	<input checked="" type="checkbox"/>	30/06/2015

11. On the **Now Pensions – Contributions for...** screen, click **'Print'** to print a report of the employees that are included in the file.
12. Click **'Create File'** to create the **Now Pensions V1.2** file



13. On the **Save As** screen, choose the location where the file will be created and then click **'Save'**
14. A message will advise the location where the **Now Pensions V1.2** file has been created



Upload the Now Pensions V1.2 file to Now: Pensions

1. Login to your employer portal
2. Select the **Import Data** menu item
3. Choose the **Generic Input File** option, unless you have been told otherwise by Now.
4. **Browse** to the location where payroll created the **Now Pensions V1.2** output file and then upload the file.

Click [here](#) for more information about uploading a **Now: Pensions** file.

Software available from IRIS

IRIS Payroll Basics

Free, RTI compliant payroll software for companies with fewer than 10 employees

IRIS Payroll Business

Intelligent, easy to use payroll software for smaller businesses

IRIS Payroll Professional

Flexible payroll software for medium sized businesses

IRIS Bureau Payroll

Intelligent management for multiple payrolls

KashFlow Payroll

Cloud-based UK payroll software – accessible from anywhere on PC, Mac or tablet

IRIS P11D

The easy way to complete employee expenses and benefits returns

IRIS HR Manager

The easy way to keep employee data up-to-date

IRIS OpenPayslips

A secure web based solution that allows your employees to access, and download their e-payslips via an online portal

Stationery order line

Tel: 0844 815 5656

HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: helpdesk@ir-efile.gov.uk

HMRC employer helpline

Tel: 0300 200 3200

HMRC employer helpline (for new business)

Tel: 0300 200 3211

Support

Tel: 0844 815 5661 (Option 1)

Fax: 0844 815 5665

Email: payroll@iris.co.uk