

IRIS PAYE-Master

Guide to creating Peoples Pension output file

01/07/2015



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Introduction

This guide will give you an overview of how to configure your payroll to include information required in the Peoples Pension output file. You can create an output file for Peoples Pension to enrol workers and inform them of the contributions taken, which is contained in one file.

The guide covers:

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



Peoples Pension Configuration

People's Pension require you to supply your B&CE account number, for the pension scheme, in each output file. You enter this number on the **Configure Pension Fund Details** screen.

Also, People's Pension require at least one Worker Group to identify the different contribution rates and earnings bases for different groups of employees. You could separate employees by different departments, sites or contribution levels.

The Worker Group is configured when you set up the employer's account with People's Pension, for more information click <u>here</u>.

Pension Fund Configuration:

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

- 1. Go to the Pension menu and select 'Configure Pension Fund',
- 2. Select the Peoples Pension fund and click 'Edit'
- On the General tab, in the Unique ID field enter your B&CE account number

In the **Output File** field, select **'Peoples Pension'**

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

4. Click 'Save' and then 'Close'

Pension Fun	d Details	? ×
Fund No 4	Peoples Pension	
General Bank	Contributions	1
Name	Peoples Pension	Unique ID 12345
Address	1 High Street	Output File Peoples Pension 💌
	Stockton	Include Employees
Postcode	TS18 3TP	Scheme Type
Telephone		Scheme Ref
Contact		Minimum Contribution 0.00
Email		Last Payment
Website		Next Payment Due
Employee Portal		Special Tax Rules 🗌 No
Help		Save Close

Employee Details Configuration

You will need to select the Worker Group for each employee.

- On the left-hand Selection Bar, select the appropriate employee to open their Employee Details
- 2. Select 'Pension Refs' tab



 Choose the appropriate option from the Peoples Pension – Worker Group ID from the dropdown field. If the field doesn't contain the appropriate Worker Group, click the icon to it. Click <u>here</u>

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

for instructions

Employee No	2 Employee List		Auto Absence Calcula
Personal G	eneral Pay Rates Pay Method Tax Details N.I.	Details Sundry Pension P	ension Refs
	NEST Details		
	Group	<none></none>	-
	Date Group Changed		•
	Payment Source	<none></none>	•
	Date Payment Source Changed		•
	Overseas National Awaiting NI Number		
	Output File Fields		
	Friends Life/Now Pensions - Category	-	
	Peoples Pension - Worker Group ID	Managers 💌	
	Scottish Widows - Pay Group/ Now PAY CODE	·	

Add a Worker Group

 In Employee Details, on the Pension Refs tab click the icon to the right of the Peoples Pension – Worker Group ID field to add a Worker Group.

Employee	Details - Mr Joe Bloggs [Weekly]		? 🔁
Employee No	2 Employee List		Auto Absence Calculatio
Personal G	eneral Pay Rates Pay Method Tax Details N.I.	Details Sundry Pension	Pension Refs
	NEST Details		
	Group	<none></none>	•
	Date Group Changed		•
	Payment Source	<none></none>	•
	Date Payment Source Changed		•
	Overseas National Awaiting NI Number		
	Output File Fields		
	Friends Life/Now Pensions - Category		I 💻
	Peoples Pension - Worker Group ID		·
	Scottish Widows - Pay Group/ Now PAY CODE		
l			
Help		M C AI New	Save Close

 On the Worker Groups screen, click 'Add' to open the Add Worker Group screen



 Enter the Worker Group, click 'Save' to close the Add Worker Group screen

Add Worke	r Group	×
Enter Worker (Group: Office Staff	
	Save Close	

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



Create output file

You should send an output file to People's Pension each period you have paid your employees. This file will contain joiner and contribution information.

Create a Peoples Pension file:

- 1. Go to the Pensions menu and select 'Create Pension File'
- 2. On the Select File to Create screen, choose 'Peoples Pension V8.1'
- 3. Click 'OK'
- On the Period for Contribution Schedule screen, the NEST Payment Frequency field is disabled
- In the Pension Fund field, choose your Peoples Pension fund

Period For Contribution Schedule	8 x
Employee List	Note: Only periods that have been finalised can be used to create the pension file.
Payment Source & Details NEST Payment Frequency Pension Fund Date Payment Due Payment Source	Collect NEST Payment Pay Petiod Peoples Pension Period No Collect Anspe Collect Anspe Collect Anspe To
Help	OK Cancel

- 6. Date Payment Due and Payment Source fields are disabled
- 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, Peoples Pension prefer you don't use this option but instead send them contributions when they are deducted.

- 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 Unt
2	Bloggs	Joe		04/05/2015	V	30/06/2015

 You must inform People's Pension of any employees that didn't have a pension contribution taken or made a reduced contribution.
 You can change the **Reason**

			comp commo	Reason for reduced employee contributions	Partial / Non-pay Date
Bloggs	Joe	600.00	6.00	1 - Employee has left the customer	13/05/2015

for Reduced Employee Contributions if you want to by clicking in the field and selecting another option.

- 12. Click 'Next'
- On the Peoples Pension Contribution
 for...screen, click 'Print' to print a report of the employees that are included in the file.
- 14. Click 'Create File' to create the Peoples Pension file

Peoples Pension - Contributions for 04/05/2015 to 10/05/2015	? ×
Summary of file contents	
Total Pensionable Earnings	600.00
Total Employer Contributions	6.00
Total Employee Contributions	6.00
Number of employees with Reduced Contributions	1
Total employees included in the file	1
Back Print Create File	Close

- **15.** On the **Save As** screen, choose the location where the **Contribution Schedule** file will be created and then click **'Save'**
- A message will advise the location where the Peoples Pension file has been created

Peoples Pe	nsion file successfully created
I	The Peoples Pension - Contributions file has been created successfully in C:\Program Files (x86)\IRIS Software Ltd\PAYE-Master.NET The file name is Peoples PensionCSPM0082015050420150510.CSV
	ОК

Upload Peoples Pension file:

- 1. Login to your Peoples Pension account on the People's Pension website
- 2. Please refer to Peoples Pension Help facilities for more information

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

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