

IRIS Payroll Professional

Guide to creating Now: Pensions output file

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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.

Pension Fund Configuration

1. Go to the **Pension** menu and select '**Configure Pension Fund**'
2. Select the Now Pension fund and click '**Edit**'
3. On the **Configure Pension Fund Details** screen, in the **Unique ID** field enter your ER Code that was supplied by Now Pension
4. In the **Output File** field, select '**Now Pensions V1.2**'
5. In the **Include** field, select '**This fund only**'
6. Tick the box **Add Employee contributions to Employer's**. This box is only enabled if the pension deductions assigned to the Now Pension fund are Salary Sacrifice ones
7. Click '**OK**'

Employee Details Configuration

Now Pensions require a Scheme Code and Pay Code for each employee in the output file.

1. In **Employee Details**, select the **Pensions** tab
2. In the **Friends Life/Now Pensions - Category** field, select the appropriate Scheme Code for the employee
3. In the **Scottish Widows - Pay Code/Now PAY CODE** field, select the appropriate Pay Code for the employee

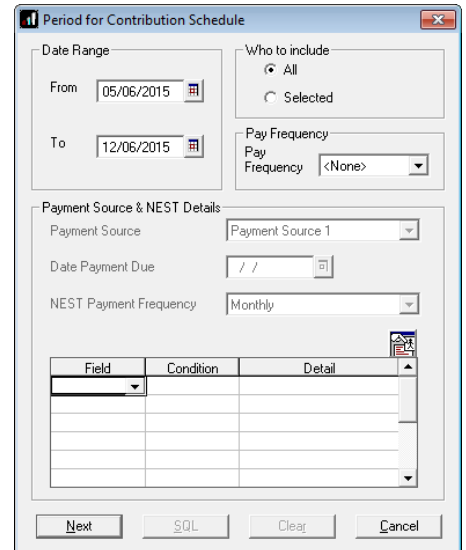
If the **Friends Life/Now Pensions - Category** or the **Scottish Widows - Pay Code/Now PAY CODE** don't contain the appropriate options, you can create a new one by typing directly in the field and then click '**Save**'.

Now Pensions 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.

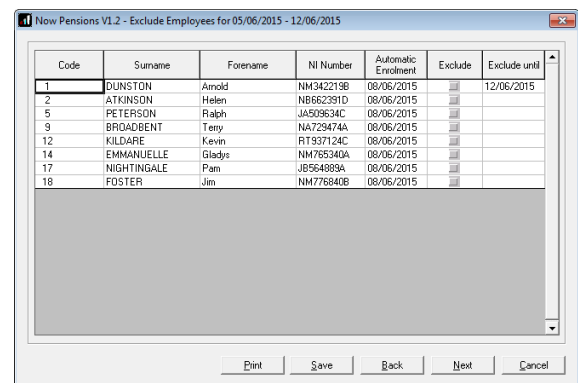
Create output file

1. Go to the **Pension** 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, enter the '**From**' and '**To**' dates for the date range to create the file.
5. In **Who to include**, leave the default setting as '**All**' unless you want to create the output file for a selection of employees
6. If your company has employees in different pay frequencies, for example weekly and monthly paid employees, select '**Pay Frequency**' to choose the payment frequency of employees you want to include in the output file
7. Click '**Next**'



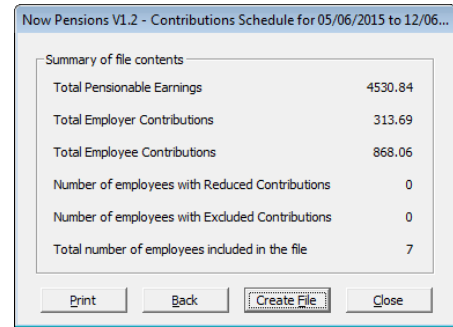
Your payroll has the ability to hold back contributions until the end of the opt-out window, as per the Pensions Regulator's advice. You must check with Now Pension if you are permitted this option.

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



Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude until
1	DUNSTON	Arnold	NM342219B	08/06/2015	<input type="checkbox"/>	12/06/2015
2	ATKINSON	Helen	NB662391D	08/06/2015	<input type="checkbox"/>	
5	PETERSON	Ralph	J6509634C	08/06/2015	<input type="checkbox"/>	
9	BROADBENT	Tony	NA729474A	08/06/2015	<input type="checkbox"/>	
12	KILDARE	Kevin	RT937124C	08/06/2015	<input type="checkbox"/>	
14	EMMANUELLE	Gladys	NM765340A	08/06/2015	<input type="checkbox"/>	
17	NIGHTINGALE	Pam	JB564889A	08/06/2015	<input type="checkbox"/>	
18	FOSTER	Jim	NM776840B	08/06/2015	<input type="checkbox"/>	

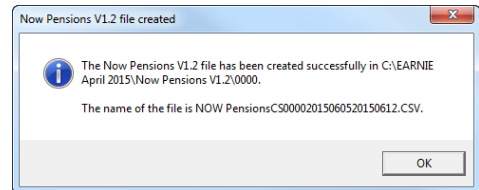
10. On the **Now Pensions V1.2 – Contributions Schedule for...** screen, click **'Print'** to print a report of the employees that are included in the file
11. Click **'Create File'** to create the **Now Pensions V1.2** file



Summary of file contents	
Total Pensionable Earnings	4530.84
Total Employer Contributions	313.69
Total Employee Contributions	868.06
Number of employees with Reduced Contributions	0
Number of employees with Excluded Contributions	0
Total number of employees included in the file	7

Buttons: Print, Back, Create File, Close

12. A message will advise the location where the **Now Pension V1.2** file has been created



Upload Now Pensions file:

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.

Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary calculations, produce files in the right format for your pension provider* and generate the necessary employee communications.

IRIS OpenPayslips

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite™.

IRIS Auto Enrolment Training Seminars

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

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
Tel: 0844 815 5700	Tel: 0844 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk