

Earnie

Guide to creating Peoples Pension output file

25/08/2015



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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, all in the 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.

Pension Fund Configuration

- 1. Go to the **Pension** menu and select 'Configure Pension Fund'
- 2. Select the Peoples Pension fund and click 'Edit'
- On the Configure Pension Fund Details screen and enter your 'Unique ID' supplied by Peoples Pension
- 4. Click **'OK'**

Fund No	2			Scheme Type De	ined Contribution	
Name	Peoples Pension	Unique ID	12345	Qualifying Scheme 🔽		
Address	2 Glerwood Avene	Telephone		Output Files		
	Moston Manchester	Contact	-	Output File Per	ples Pension V8.1	
			1	Include	s fund only	
	Postcode: M9 1L4	Scheme Ref	1	Add Employee contributi	ons to Employer's	
Email Address		SCON No		Pension Details		
Website		Employee Portal		Pension		Selected
Bank Details				AVC Pension Employee	0.00	
Name		Sort Code		Pension Employee Pension Employee	0.00	
				AE Salary Sacrifice	- EE 1.00	
Address		Account No.		AE Salary Sacrifice		×
		Account Name		AE Net · EE	1.00	
		Account manu	1	AE Net - ER	1.00	1
		Bank Ref 1		AE Gross - EE	1.00	
	Postcode:			AE Gross - ER	1.00	
		Bank Ref 2		Salary Sacrifice - El	1.00	

Employee Details Configuration

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>.

 In Employee Details, select the Peoples Pension – Worker Group ID for each employee that is a member of the Peoples Pension scheme. This is AE Worker Group in People's Pension for the employee.

Group	<none></none>	×
Date Group Changed	п	
Payment Source	<none></none>	•
Date Payment Source Changed	п	
Overseas National Awaiting NI Number	г	
Output File Fields		
Friends Life/Now Pensions - Category		•
Peoples Pension - Worker Group ID	Admin	•
Scottish Widows - Pay Group/Now PAY CODE		×

If the Peoples Pension -

Worker Group ID doesn't contain any options, you can create a new one by typing directly in the field and then click **'Save'**. The new **Peoples Pension – Worker Group ID** option will be available to select in the dropdown field.



Peoples Pension 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 output file

- 1. Go to the Pension menu and select 'Create Pension File'
- On the Select file to create screen, choose 'Peoples Pension v8.1'
- 3. Click 'Next'
- On the Period for Contribution Schedule screen, enter the 'From' and 'To' dates for the date range to create the file.
- In Who to include, leave the default setting as 'All' unless you want to create the output file for a selection of employees

Period for Contri	bution Schedu	le 🛛	×
Date Range		Who to include	
From 19/05/2	2014 🔳	C Selected	
To 25/05/2	2014 🔳	Pay Frequency Pay Frequency Weekly	[
Payment Source &	NEST Details		
Payment Source		<select payment="" source=""></select>	
Date Payment Du	ie 🗍	7.7 回	
NEST Payment F	requency	<select freque<="" nest="" payment="" td=""><td></td></select>	
		翻	
Field	Condition	Detail 🔺	
<u>N</u> ext	<u>s</u> ql	Clea <u>r</u> <u>C</u> ancel	

- 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. However, Peoples Pension prefer you don't use this option but instead send them contributions when they are deducted.

 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

You must check with Peoples Pension if you are permitted this option.

es for 19/05/2014 - 25/05/2014 Reoples Per on V8.1 - Exclude Em NI Number Forename Exclude Exclude until Surname 31/07/2014 31/07/2014 31/07/2014 DUNSTON ATKINSON PETERSON BROADBENT NM342219E NB662391D JA509634C A7294744 19/05/201-JACKSON KILDARE EMMANUELLE NIGHTINGALE FOSTER 19/05/2014 19/05/2014 19/05/2014 19/05/2014 M775544 11937124L NM765340A Print Save Back Next Cancel

9. Click 'Next'

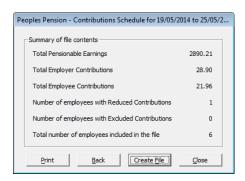


 You must inform People's Pension of any employees that made a reduced contribution, left the company or stopped contributions.

Select the **'Reason for Reduced Employee Contributions'** most appropriate for the employee.

- 11. Click 'Next'
- On the Peoples Pension Contribution Schedule for...screen, click 'Print' to print a report of the employees that are included in the file
- Click 'Create File' to create the Peoples Pension –
 Contribution Schedule file
- 14. A message will advise the location where thePeoples Pension file has been created

ode	Sumame	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions		Date of Partial or Non-Payment	-
_	BROADBENT	Terry	NA729474A	694.00	0.00	2 - Employee is temporarily absent	٠		1
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Peoples Pe	ension file created
Ĵ	The Peoples Pension file has been created successfully in C:\Program Files (x86)\EARNIE\People Pension\0000. The name of the file is People PensionCS00002014051920140525.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



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		
1	Tel:	0300 200 3600	Tel:	0300 200 3200	
1	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



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