

# IRIS Payroll

Guide to creating Peoples Pension 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 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

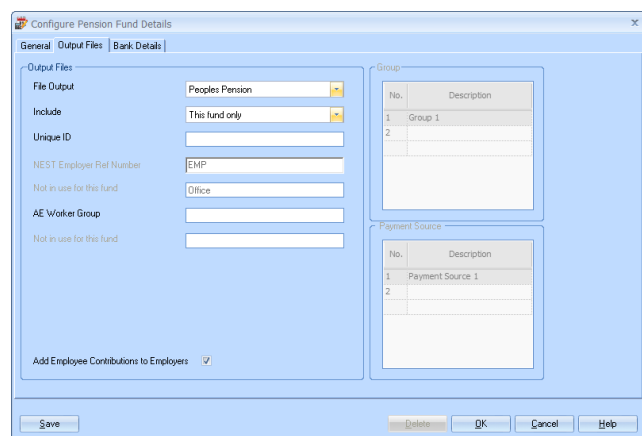
People's Pension require you to supply your B&CE account number, for the pension scheme, in each output file.

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 [here](#).

### Pension Fund configuration:

1. Go to the **Pension** tab and click **'Configure Pension Fund'**
2. Select the Peoples Pension fund and click **'Edit'**
3. Select **'Output Files'** tab
4. In the **File Output** field, select **'Peoples Pension'**
5. In the **Include Employees** field, select **'This fund only'**
6. In the **Unique ID** field, enter your B&CE account number as supplied by Peoples Pension
7. In the **AE Worker Group** field, enter the Worker Group you want to be applied to the employee's details when an employee is automatically enrolled
8. If you have Salary Sacrifice pension deductions, tick **'Add Employee Contributions to Employers'**



No.	Description
1	Group 1
2	

No.	Description
1	Payment Source 1
2	

If your pension deductions are not Salary Sacrifice, the **Add Employee Contributions to Employers** box is disabled

9. Click **'OK'**

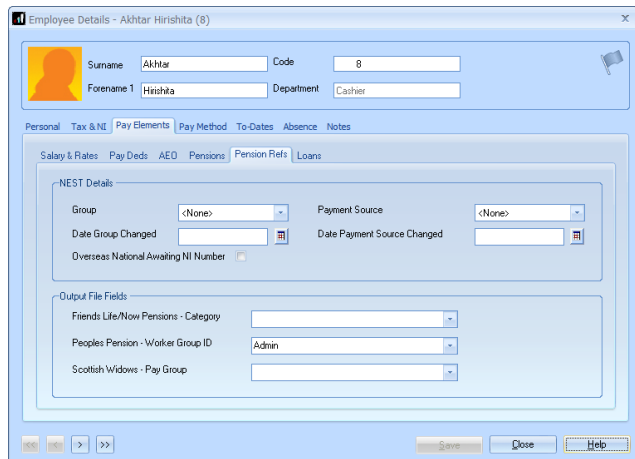
## Employee Details configuration

If you have more than one Worker Group configured, then you will need to select the appropriate one for the employee in **Employee Details**.

### Add AE Worker Group to an employee:

1. On the left-hand Selection Bar, double-click on the appropriate employee to open their **Employee Details**
2. Select the **'Pay Elements'** tab and the select **'Pension Refs'**
3. In the **Peoples Pension – Worker Group** field, select the appropriate option for the employee.

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.



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

## 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 Peoples Pension file:

1. Go to the **Pension** menu and select '**Create Pension File**'
2. On the **Select file to create** screen, choose '**Peoples Pension v8.1**'
3. Click '**Next**'
4. On the **Period for Contribution Schedule** screen, choose the '**Pay Frequency**' and '**Pay Period**' you processed the payroll for and want to create the People's Pension file
5. In the **Who to include** section, accept the default of '**All**'
6. 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.

7. 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.

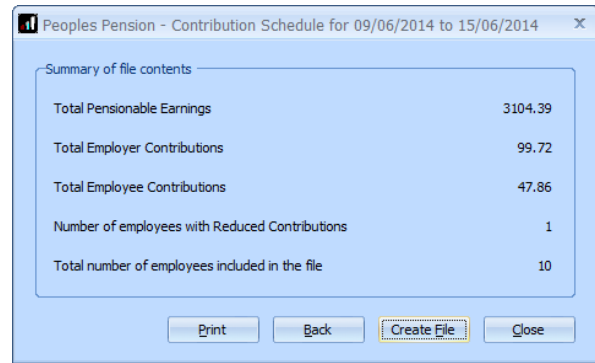
Code	Surname	Forename	NI Number	Automatic Enrolment	Exclude	Exclude Until
1	DUTTON	Kaye	NH897237A	09/06/2014	<input type="checkbox"/>	
8	AKHTAR	Hirishita	HA981373A	09/06/2014	<input type="checkbox"/>	
12	BONIEK	Zbigniew	ZB566780A	09/06/2014	<input type="checkbox"/>	
7	CROSS	Samantha	SZ673764A	09/06/2014	<input type="checkbox"/>	
4	GOLD	Susan	SG875675A	09/06/2014	<input type="checkbox"/>	
5	HELMRICH	Hugh	NH733492A	09/06/2014	<input type="checkbox"/>	
6	JUGOVIC	Adrianna	NA489709B	09/06/2014	<input type="checkbox"/>	
9	MALONE	Michael	MA485485A	09/06/2014	<input type="checkbox"/>	

8. Click '**Next**'
9. You must inform People's Pension of any employees that didn't have a pension contribution taken or made a reduced contribution.

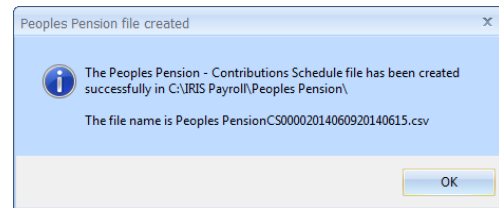
Code	Surname	Forename	NI Number	Pensionable Earnings	Employee Contributions	Reason for Reduced Employee Contributions	Date of Partial or Non-payment
8	Akhtar	Hirishita	HA981373A	253.84	3.43	Employee has left the customer	

You can change the **Reason for Reduced Employee Contributions** if you want to by clicking in the field and selecting another option.

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



13. A message will advise the location where the **Peoples Pension Contribution Schedule** file has been created



## 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

### **IRIS OpenPayroll**

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

0844 815 5656

## HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: [helpdesk@ir-efile.gov.uk](mailto: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 4)

Fax: 0844 815 5665

Email: [ipsupport@iris.co.uk](mailto:ipsupport@iris.co.uk)