12Pay

Automatic Enrolment Configuration Tool

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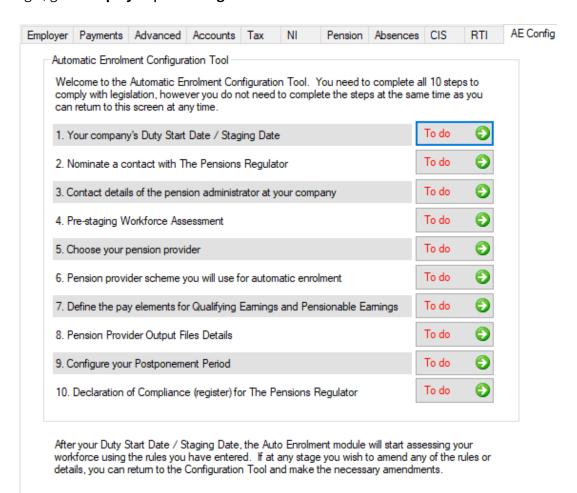# Contents

How do I set up Automatic Enrolment in the payroll software?

To assist you, the payroll software contains an **Automatic Enrolment Configuration Tool**, covering all the steps you need to take to configure your system.

To begin, go to **Employer | AE Config**

These are all the steps you need to take to comply with existing legislation. You do not need to complete all of the steps at once as you can return to this screen at any time.

Use the **Previous** and **Next** buttons to navigate between the screens:

- Click on each arrow to open the relevant screen
- As you complete each step, To do will change to Complete

Here are some further details on completing each step:

Please Note: You can return to the **Automatic Enrolment Configuration Tool** at any stage to make changes

1. Your Company's Duty Start Date / Staging Date

This is when automatic enrolment duties begin to apply to your company. You need to meet your key duties by this date.

To find out your Duty Start Date / Staging Date, go to this section of **The Pensions Regulator** website and enter your PAYE Reference number (e.g. 913/WZ5121A).

2. Nominate a contact with the Pensions Regulator

You need to inform The Pensions Regulator who they need to send important communications to regarding automatic enrolment.

Click the link **Nominate a contact with The Pensions Regulator**. This takes you to the section of **The Pensions Regulator** website where you need to enter your details.

You will need to tick the **Mark as Complete** button to mark this step as complete.

3. Company Pension Scheme Administrator Details

These are the details of the individual in your company who will be communicating with your pension provider regarding enrolling workers etc.

It is important to complete this section as these details are used in communications sent to your employees using OpenEnrol.

4. Pre-staging Workforce Assessment

This screen enables you to get an estimate of how many employees are likely to be automatically enrolled at your Duty Start Date / Staging Date. This will exclude employees with **Excluded from AE** selected.

5. Pension Scheme Providers

Select the Pension Provider you are using from the drop-down list. We only list the companies we currently work with to provide pension output files.

6. Pension Provider Details

Your pension provider should supply you with the details you need to complete this screen. If you are using an existing scheme, you can also select this here.

Completing this screen will create your pension deductions for you. Alternatively, you can set up your deductions via **Payments/Deductions**.

7. Qualifying Earnings and Pensionable Earnings

This screen describes the difference between the two and enables you to tick/un-tick elements of employees' pay as required by your pension scheme. You will need to tick the **Mark as Complete** once this step has been carried out.

8. Pension Provider Output File Details

The AE feature allows you to produce output files for your chosen provider to be uploaded directly to their web portal.

Pension providers will require different employees including in the output file, depending on whether payroll is doing the assessment. Generally, payroll will do the assessment and the 'include' option will be set to 'This fund only' by default. If you are unsure who should be included in your output files, please contact your pension provider.

9. Postponement Period

It is possible to delay automatic enrolment assessment for up to three months at Duty Start Date / Staging Date or a new employee's Start Date.

You can also delay automatic enrolment assessment for employees who become eligible jobholders for up to three months.

Enter your postponement requirements on this screen.

You will need to tick **Mark as Complete** when you finished setting up your Postponement Periods.

For further details on Postponement, click **here** to view the **Legislation Guide**.

10. Declaration of Compliance

Once you have enrolled your employees, you must complete your Declaration of Compliance with The Pensions Regulator. The declaration confirms that you have complied with your legal duties.

Even if you have not had to enrol anyone (but had employees on your Duty Start Date / Staging Date), you still need to complete your declaration.

Click the link **Complete Declaration of Compliance (registration)** to complete this online. You can start at any time; however, you cannot complete it until a month after your Duty Start Date / Staging Date (and must complete it within five months).

The payroll software provides a report, which you can print from this screen, containing much, but not all, of the information you need to complete the declaration. The Pensions Regulator's Declaration of compliance (registration) checklist is available **here**.

When you have completed your declaration online, tick **Mark as Complete**.

Useful numbers

HMRC online service helpdesk	HMRC employer helpline
Tel: 0300 200 3600 **Fax:** 0844 366 7828 **Email:** helpdesk@ir-efile.gov.uk	**Tel:** 0300 200 3200 **Tel:** 0300 200 3211 (new business)

Contact Support

Your Product	Phone	E-mail
IRIS 12Pay	N/A	support@12pay.co.uk
IRIS PAYE-Master	0344 815 5555	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5555	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5555	ipsupport@iris.co.uk
IRIS GP Payroll	0344 815 5555	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5555	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5555	earniesupport@iris.co.uk
IRIS Payroll Professional (formerly Star)	0344 815 5555	payroll-support@iris.co.uk

IRIS. Look forward