

Capital Gold Payroll (4.05)

Auto Enrolment Configuration Tool Guide

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Guide published by:
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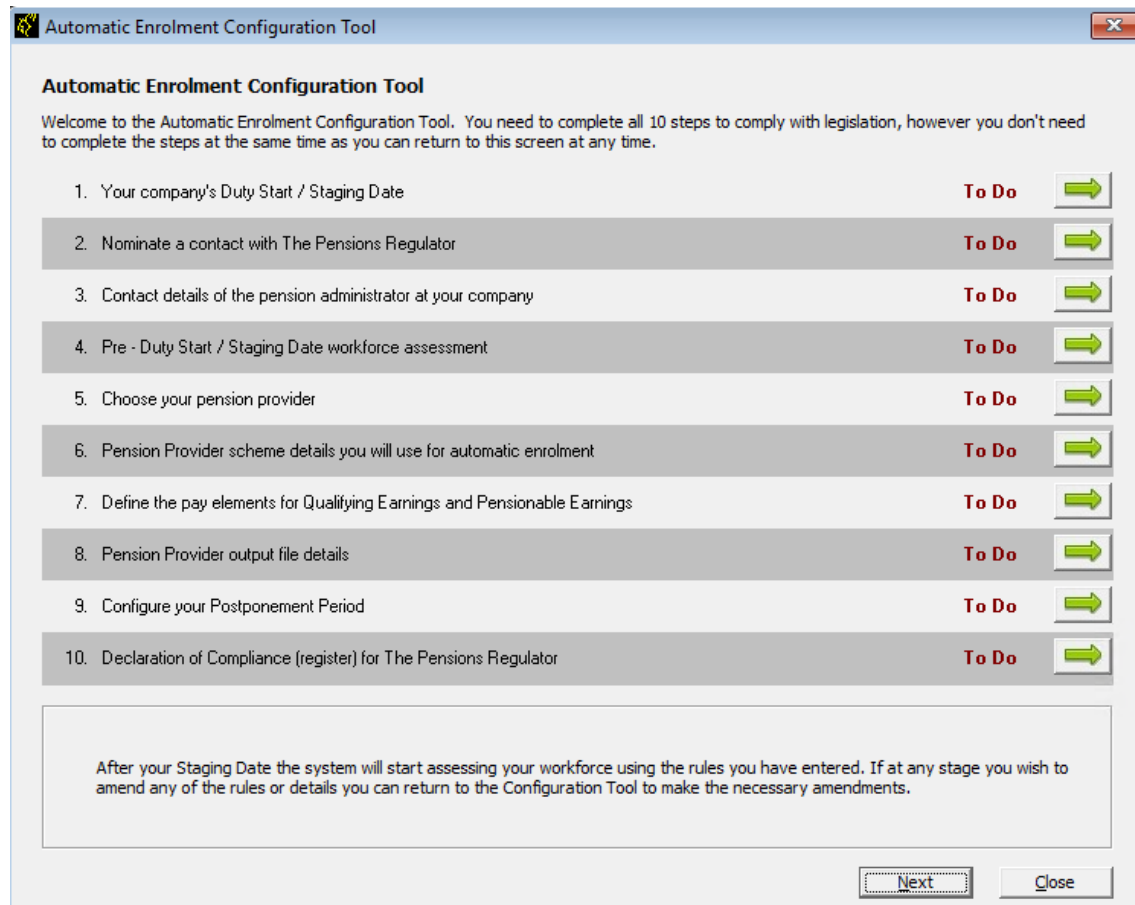
Auto Enrolment Steps

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

Before using this tool please make sure that you have all your necessary pension details to hand.

You can use this tool before purchasing the auto enrolment module but to process auto enrolment calculations and deductions the auto enrolment module must be purchased. Please call 01536 495108 to speak to our customer services team.

To begin, click on the **Pension** menu and select **Auto Enrolment Configuration Tool**.



These are all the steps you need to take to comply with existing legislation. You don't 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, the status **To do** will either automatically change to **Complete**, or you will be asked to complete the step.

Note: You can return to the **Automatic Enrolment Configuration Tool** at any stage to make changes – the only exception to this is step 6 pension scheme details where the boxes will be disabled as soon as you move to the next step.

1.	Your company's Duty Start / Staging Date	<p>The date when automatic enrolment duties begin to apply to your company. You need to meet your key duties by this date.</p> <p>Visit the Employers area of The Pensions Regulator website for more information.</p>
2.	Nominate a contact with The Pensions Regulator	<p>You need to inform The Pensions Regulator who they need to send important communications to regarding automatic enrolment.</p> <p>Click the button 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 enter your reference code which you will find on any letter you have received from The Pensions Regulator.</p> <p>Click the Mark as Complete button to mark this step as complete.</p>
3.	Company Pension Scheme Administrator Details	<p>These should be the details of the individual in your company who will be communicating with your pension provider on a day to day basis.</p>
4.	Pre-Duty Start/Staging Workforce Assessment	<p>This screen enables you to get an estimate of how many employees are likely to be automatically enrolled at your Staging Date. It is really only for your information and not a requirement.</p>
5.	Pension Scheme Providers	<p>Select the Pension Provider you are using from the drop down list. We only list the companies we currently work with in order to provide pension output files.</p>
6.	Pension Provider Details	<hr/> <p>NEST pensions: If you are using NEST you must tick the Use existing pension scheme checkbox and select the NEST fund already created in the system. This will then add the pension deductions to the existing NEST fund.</p> <hr/> <p>Your pension provider should supply you with the details you need to complete this screen. You are also able to select an existing pension scheme.</p> <p>Completing this screen will create your pension deductions for you. Alternatively, you can set up your deductions via Company Alter Payment/Deductions.</p>
7.	Define the pay elements for Qualifying Earnings and Pensionable Earnings	<p>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 click the Mark as Complete button to mark this step as complete.</p> <p>Your pension provider will tell you what to include in pensionable earnings.</p>

8.	Pension Provider Output File Details	<p>Pension providers require different employees to be included in the output file depending on whether or not the payroll software is doing the assessment.</p> <ul style="list-style-type: none"> • Generally, we assume payroll will do the assessment and as such, the Include option will be set to This fund only by default. • If assessment is being done by another method, for example using another piece of software, information may be needed on all employees, therefore you would need to select All Employees. <p>If you are unsure who should be included in your output files, please contact your pension provider.</p>
9.	Configure your Postponement Period	<p>It is possible to delay automatic enrolment assessment for up to three months at Staging Date or a new employee's Start Date.</p> <p>You can also delay automatic enrolment assessment for employees who become eligible jobholders for up to three months.</p> <p>Enter your postponement requirements on this screen. You will need to click the Mark as Complete button to mark this step as complete. For more information go to www.thepensionsregulator.gov.uk/postponement.aspx</p>
10.	Declaration of Compliance	<p>Once you've enrolled your staff, you must complete your Declaration of Compliance with The Pensions Regulator. The declaration confirms that you've complied with your legal duties.</p> <p>Even if you haven't had to enrol anyone (but had employees on your staging date), you still need to complete your declaration.</p> <p>Click the button Complete Declaration of Compliance to complete this online. You can start at any time, however you cannot complete it until a month after your Staging Date (and must complete it within five months).</p> <p>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.</p> <p>The Pension Regulator's Declaration of Compliance (registration) checklist is available at www.thepensionsregulator.gov.uk/docs/automatic-enrolment-online-registration-checklist.pdf.</p> <p>When you have completed your declaration online, click the Mark as Complete button. For more information go to www.thepensionsregulator.gov.uk/completing-the-declaration-of-compliance.aspx.</p>

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After using the tool and before auto enrolment

Employee Details

Before an employee is automatically enrolled there are some details which you may need to complete.

Note: For employees with an existing pension, which meets the criteria to be an automatic enrolment scheme, go to **Employee details | Auto Enrol** and tick **Member of a Qualifying Scheme**. This needs to be done before the first payroll run after Staging.

1. On the **Employee details | Auto Enrol** tab:
2. Complete the tick box **Works outside of UK** if necessary.
3. As only one **Pension Fund** can be used for **Auto Enrolment**, if you have several **Pension Funds**, you will need to apply these to **Employee details** manually.

Note: The **Transitional Period** flag ended on 30th September 2017 and has been removed from the software.

Payroll Calendar

You need to set up the **Payroll Calendar** to ensure the pay reference periods used during Automatic Enrolment assessment are correct. It displays the current tax year automatically but you can view any tax years that have been set up.

The **Payroll Calendar** allows you to define the date for pay dates, work periods, and BACS dates. You have options for monthly, weekly, two weekly, four weekly and quarterly but you only need to complete the pay frequencies you use.

1. From the **Company** menu select **Payroll Calendar**.
2. Click into the grid to enter a period's start date.
3. The subsequent **Start** and **End** dates will automatically be populated from the first entry to the end of the year.
4. If you start using the payroll software part way through the year you can configure the calendar from that point.

Note: You can return to the **Configuration** screen at any time using the **Configuration** button.

Qualifying (banded) Earnings

Qualifying (banded) Earnings are the earnings you can use to calculate contributions for an auto enrolment pension. For the 2018/2019 tax year this is between £6,032 and £46,350 a year.

If you select Qualifying (banded) Earnings to work out contributions the payroll software will contribute a percentage of a worker's gross annual earnings that fall between £6,032 and £46,350. The first £6,032 of their earnings isn't included in the calculation. For example, if a worker earns £20,000 their qualifying earnings would be £13,968.

These are annual figures. Because you pay contributions every time you pay your workers, the payroll software will calculate contributions based on qualifying earnings for each pay period in turn.