

NOW: Pensions

Smarter. Simpler. Better.



Guide to setting up pay periods

Within this document you will find instructions for creating new pay periods and amending existing pay periods including week 53. We have used the 2015/2016 tax year as an example to show you how this is done.

Please note, a minimum of 3 months' and a maximum of 12 months' future pay periods should be entered in the site at any one time.

Creating new pay periods

There are two ways of creating the pay periods in the NOW: Pensions portal and these are:

1. Upload the pay periods

To upload the pay periods into the system by CSV file you need to create a spreadsheet that contains the following columns (the headers should be entered as per the format below):

- **Payroll Code** – this is the code you have set up in the NOW: Pensions portal
- **Pay Period** – this is the tax week/month for the relevant pay period
- **Pay Period Start Date** – this is the date the pay period commenced, and this should replicate the date that will be entered in the files that are produced from your payroll system. The pay period start date for pay period 1 of the 2015/2016 tax year for example would be 06/04/2015
- **Pay Year** – to enable us to identify which tax year the pay period relates to please enter the starting year of the tax year in this field. For example the pay year for any pay period in the 2015/2016 tax year would be 2015.
- **Processing Date** – this is the last date you would expect to upload a file for any given pay period. If a file has been uploaded it is also the date the system will lock the pay period and process the data. No changes will be allowed to the data once the pay period has been locked
- **Pay Date** – this is the date the employees are paid
- **Company Code** – this is the company's unique code (provided by NOW: Pensions)
- **Payroll Type** – this is the payroll frequency, i.e. Weekly
- **Processed** – please enter No in each cell for this column.
- **Processed Date** – this column should be left blank

To make things easier for you please use the payroll calendar upload template that can be downloaded [here](#). This has all of the required fields already entered and you simply need to populate the spreadsheet (an example of what the spreadsheet might look like is below)

| Payroll Code | Pay Period | Pay Year | Pay Period Start Date | Processing Date | Pay Date | Company Code | Payroll Type | Processed | Processed Date |
|--------------|------------|----------|-----------------------|-----------------|------------|--------------|--------------|-----------|----------------|
| WEEK | 53 | 2014 | 05/04/2015 | 17/04/2015 | 17/04/2015 | FUL1 | Weekly | No | |
| WEEK | 1 | 2015 | 06/04/2015 | 17/04/2015 | 17/04/2015 | FUL1 | Weekly | No | |
| WEEK | 2 | 2015 | 13/04/2015 | 24/04/2015 | 24/04/2015 | FUL1 | Weekly | No | |
| WEEK | 3 | 2015 | 20/04/2015 | 01/05/2015 | 01/05/2015 | FUL1 | Weekly | No | |
| WEEK | 4 | 2015 | 27/04/2015 | 08/05/2015 | 08/05/2015 | FUL1 | Weekly | No | |
| WEEK | 5 | 2015 | 04/05/2015 | 15/05/2015 | 15/05/2015 | FUL1 | Weekly | No | |
| WEEK | 6 | 2015 | 11/05/2015 | 22/05/2015 | 22/05/2015 | FUL1 | Weekly | No | |
| WEEK | 7 | 2015 | 18/05/2015 | 29/05/2015 | 29/05/2015 | FUL1 | Weekly | No | |
| WEEK | 8 | 2015 | 25/05/2015 | 05/06/2015 | 05/06/2015 | FUL1 | Weekly | No | |

N.B please note the entry for Pay Period 53, this pay period needs to be created to complete the calendar for the 2014/2015 tax year.

Once you have created the spreadsheet you need to go to the Import Data option, select the Payroll Details option from the drop down box, locate the file that you have just created, enter your email address and select import data.

You will then be shown the payroll importer options screen, no action is required on this screen and you just need to select 'Begin Loading Data into the Database'

Once the import process has run the following screen will appear. The content of this screen will indicate whether or not your import was successful.

Import No. 13 is complete

Details

| | |
|------------------------------|---|
| Import: | Payroll Details |
| File: | CC2C payroll upload pay 3.csv |
| Started: | 19/06/2014 16:20:24 |
| Finished: | 19/06/2014 16:20:28 |
| User: | |
| Time Taken: | 0:00:04.313 |
| Status: | Complete |
| Status Detail: | Import complete all records Imported (Success) |
| Options: | Add, Update |
| Starting Maintenance Mode: | Normal |
| Requested Maintenance Mode: | Normal |
| Notification E-Mail Address: | |
| ValidationThreshold: | 100 |
| Retention period (days): | 0 (Forever) |
| Imported file: | CSV |
| Results: | Import was successful. 11 record(s) in the import file 0 record(s) rejected 0 record(s) skipped 11 record(s) imported into the database |
| Import Log: | CSV |

Please note the 'Status Detail' field – which should read as complete and (Success). If you do encounter any errors, you will need to correct these on the CSV file and then re-upload the file using the process above.

2. Create the pay periods manually

To enter the pay periods manually please select Reference Data, which is located on the left hand side of the home page. Under the Payrolls section you will then need to select Open for the Payroll that you are looking to create more pay periods for.

Please then select the Add button that is located at the bottom of the existing Payroll Details list.

The following input screen will appear once you have clicked on the Add button.

Payroll Details

[View Audit Trail](#)

| | | |
|-----------------------|---|-----|
| Pay Period | <input type="text" value="1"/> | * |
| Processing Date | <input type="text" value="17/04/2015"/> | * |
| Pay Period Start Date | <input type="text" value="06/04/2015"/> | * |
| Processed | <input type="text" value="No"/> | ▼ |
| Processed Date | <input type="text" value="11/11/2011"/> | |
| | <input type="text" value="00"/> : <input type="text" value="00"/> : <input type="text" value="00"/> | |
| Pay Date | <input type="text" value="17/04/2015"/> | * |
| Full Payroll Details | <input type="text"/> | |
| Pay Year | <input type="text" value="2015"/> | ✕ * |

Fields marked with an asterisk (*) must not be left empty

[Payroll Details List](#) [Save](#) [Save All](#)

Please enter the required information in the fields provided, as per the instructions below:

1. **Pay period** is the tax week or month. This will be replicated in the file that is uploaded to us for each pay period
2. **Processing date** is the last day you would expect to upload the file to us. If a file has been uploaded it is also the date the system will lock the pay period and process the data. No changes will be allowed to the data once the pay period has been locked
3. **Pay period start date** is the date the pay period commenced, this should be replicated in the file that is uploaded to us. The pay period start date for pay period 1 of the 2015/2016 tax year for example would be 06/04/2015
4. Please ignore **Processed** and **Processed Date** as these fields do not need to be completed
5. **Pay date** is the date the employees will be paid
6. Please ignore the **Full Payroll Details** field
7. **Pay Year** to enable us to identify which tax year the pay period relates to please enter the starting year of the tax year in this field. For example the pay year for any pay period in the 2015/2016 tax year would be 2015.
8. Once you have entered the above details select save and then Payroll Details List. This will then show you the pay period that you have created and allow you to add further periods.
9. Repeat steps 1 – 8 until you have created all the periods for this payroll type

Complete payroll calendar

Once you have entered the pay periods, via either the upload facility or by manually creating them, the payroll calendar might look like the screenshot below (based on a weekly payroll)

Payrolls

[View Audit Trail](#)

Payroll Code *

Payroll Type

Company Code

Fields marked with an asterisk (*) must not be left empty

[Payrolls List](#) [Save](#) [Save All](#)

Payroll Details

| Pay Period | Processing Date | Pay Period Start Date | Processed | Processed Date | Pay Date | Pay Year | | |
|------------|-----------------|-----------------------|-----------|----------------|------------|----------|----------------------|------------------------|
| 50 | 27/03/2015 | 15/03/2015 | No | | 27/03/2015 | 2014 | Open | Delete |
| 51 | 03/04/2015 | 22/03/2015 | No | | 03/04/2015 | 2014 | Open | Delete |
| 52 | 10/04/2015 | 29/03/2015 | No | | 10/04/2015 | 2014 | Open | Delete |
| 53 | 17/04/2015 | 05/04/2015 | No | | 17/04/2015 | 2014 | Open | Delete |
| 1 | 17/04/2015 | 06/04/2015 | No | | 17/04/2015 | 2015 | Open | Delete |
| 2 | 24/04/2015 | 13/04/2015 | No | | 24/04/2015 | 2015 | Open | Delete |
| 3 | 01/05/2015 | 20/04/2015 | No | | 01/05/2015 | 2015 | Open | Delete |
| 4 | 08/05/2015 | 27/04/2015 | No | | 08/05/2015 | 2015 | Open | Delete |
| 5 | 15/05/2015 | 04/05/2015 | No | | 15/05/2015 | 2015 | Open | Delete |

N.B please note the entry for Pay Period 53, this pay period needs to be created to complete the calendar for the 2014/2015 tax year.

Amending existing pay periods

If you have already created your pay periods for the tax year but you have established that the dates that have been entered are not correct then you can amend the information within the NOW: Pensions portal.

To do this please select Reference Data, which is located on the left hand side of the home page. Under the Payrolls section you will then need to select Open for the Payroll for which you are looking to amend the dates.

Please then select the Open button for the pay period that you are looking to amend.

The following input screen will appear once you have clicked on the Open button.

Payroll Details

[View Audit Trail](#)

| | | |
|-----------------------|---|---|
| Pay Period | <input type="text" value="1"/> | * |
| Processing Date | <input type="text" value="17/04/2015"/> | * |
| Pay Period Start Date | <input type="text" value="09/04/2015"/> | * |
| Processed | <input type="text" value="No"/> | |
| Processed Date | <input type="text" value="11/11/2011"/> | |
| | <input type="text" value="00"/> : <input type="text" value="00"/> : <input type="text" value="00"/> | |
| Pay Date | <input type="text" value="17/04/2015"/> | * |
| Full Payroll Details | <input type="text" value="FUL1 WEEK 1"/> | |
| Pay Year | <input type="text" value="2015"/> | * |

Fields marked with an asterisk (*) must not be left empty

[Payroll Details List](#) [Save](#) [Save All](#)

Please then amend the required information in the fields provided, as per the instructions below:

1. **Pay period** is the tax week or month. This will be replicated in the file that is uploaded to us for each pay period
2. **Processing date** is the last day you would expect to upload the file to us. If a file has been uploaded it is also the date the system will lock the pay period and process the data. No changes will be allowed to the data once the pay period has been locked
3. **Pay period start date** is the date the pay period commenced, this should be replicated in the file that is uploaded to us. The pay period start date for pay period 1 of the 2015/2016 tax year for example would be 06/04/2015, so in the example above you would need to amend the date to 06/04/2015
4. Please ignore **Processed** and **Processed Date** as these fields do not need to be completed
5. **Pay date** is the date the employees will be paid
6. Please ignore the **Full Payroll Details** field
7. **Pay Year** to enable us to identify which tax year the pay period relates to please enter the starting year of the tax year in this field. For example the pay year for any pay period in the 2015/2016 tax year would be 2015.

8. Once you have entered the above details select save and then Payroll Details List. This will then show you the pay period that you have created and allow you to add further periods.
9. Repeat steps 1 – 8 until you have amended the dates for all of the pay periods that have been created for the tax year.