

Accentra Primo Payroll

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I NEW INTEGRATION

I.1 PRIMO PAYROLL – COLLEGIA INTEGRATION

Primo Payroll has been integrated with Collegia, the UK’s first personal, workplace and Auto Enrolment pension.

1.1.1 NEW PENSION SCHEME SIGN-UP

Follow the below steps to sign-up a new pension scheme with Collegia.

Step 1: From the Employees List Screen, click the Auto Enrolment status at the bottom to expand.

Employees + 2 Weekly (4) - Period: 18/2021 ▼ Current Employees ▼

Bulk Actions ▼ Export ▼

<input type="checkbox"/>	Action	Payroll ID	Forenames	Surname	Gender	Tax Co
<input type="checkbox"/>	Create Payslip ▼	908916	Tia L	Long	Male	1250L
<input type="checkbox"/>	Create Payslip ▼	908918	Aidan	T Kerr	Male	1250L
<input type="checkbox"/>	Create Payslip ▼	908919	Edward	C Hale	Male	1250L
<input type="checkbox"/>	Create Payslip ▼	908920	Kyle	N Bond	Male	1250L

Auto Enrolment Status ▼

Step 2: Click the below highlighted box which will list the pension providers available. You’re required to enter a Duties Start Date/Staging Date in the AE Settings beforehand.

Auto Enrolment Status ▲

Your AE Staging date: 14/02/2018 **Re-Enrolment date: 14/02/2021**

You have not yet chosen your pension provider. **Click** here to select the pension provider and complete the sign-up.

Step 3: Select 'Collegia' and click the 'Sign up' button.

Pension Provider List

Smart Pension
All AE related processes except Opt-Out and Opt-In are processed by Primo Payroll. All communications will be done by Smart Pension on behalf of the Employer.

Collegia
All AE related processes except Opt-Out are processed by Primo Payroll. All communication to employees will be done by Primo Payroll and Collegia.

Providers using PensionSync
Data to the following pension providers are routed through PensionSync. All AE related process except Opt-out are processed by Primo Payroll. There is no fee for employers. All communication will be done by Primo Payroll on behalf of the employer.

- NEST
- NOW
- Legal & General
- The People's Pension
- AVIVA

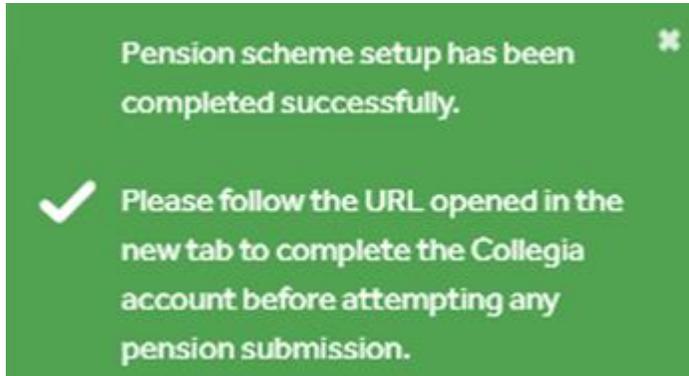
Step 4: In this screen, fill-in your company details. The 'Company Number' is the Company Registration Number. If you need help, click the help button 'Where to find the company number?'.

Enter the 'Administrator' details. As Collegia follows the 'Refief at Source' tax relief method, this is selected by default. Select the pension calculation method, postponement days and the Salary Sacrifice scheme from the dropdown. Once completed, click the 'Sign-up' button which will create a Collegia pension scheme.

Signup - Collegia Pension

Company Number	<input type="text" value="12345678901234567890"/>	Where to find the company number?
Email	<input type="text" value="kodeesh@accentra.co.uk"/>	
Phone	<input type="text" value="845 456 7181"/>	
Administrator		
Forename	<input type="text" value="Kodeesh"/>	
Surname	<input type="text" value="Jayaraj"/>	
Email	<input type="text" value="kodeesh@accentra.co.uk"/>	
Password	<input type="password" value="*****"/>	
Tax-Relief Method	<input type="text" value="Relief at Source"/>	
Pension Calculated On?	<input type="text" value="Qualifying Earnings (Banded)"/>	
Postponement Days	<input type="text" value="No Postponement"/>	
Salary Sacrifice?	<input type="text" value="No"/>	

Step 5: A confirmation message will appear upon successful sign-up. The program will automatically open a new tab redirecting you to the Collegia website where you need to complete your Collegia account mandate. Once the Collegia account has been created, you'll be able to submit the pension contributions from Primo Payroll.



1.1.1.2 SET-UP AN EXISTING COLLEGIA PENSION SCHEME

Follow the below steps to setup an already existing Collegia pension scheme in Primo Payroll.

Step I: From the Employees List Screen, click the Auto Enrolment status at the bottom to expand.

Employees ⊕ 2 Weekly (4) - Period: 18/2021 ∨ Current Employees ∨

<input type="checkbox"/>	Action	Payroll ID	Forenames	Surname	Gender	Tax Co
<input type="checkbox"/>	Create Payslip ∨	908916	Tia L	Long	Male	1250L
<input type="checkbox"/>	Create Payslip ∨	908918	Aidan	T Kerr	Male	1250L
<input type="checkbox"/>	Create Payslip ∨	908919	Edward	C Hale	Male	1250L
<input type="checkbox"/>	Create Payslip ∨	908920	Kyle	N Bond	Male	1250L

Auto Enrolment Status ∨

Step 2: Click the below highlighted box which will list the pension providers available. You're required to enter a Duties Start Date/Staging Date in the AE Settings beforehand.

Auto Enrolment Status ▲

Your AE Staging date: 14/02/2018 **Re-Enrolment date: 14/02/2021**

You have not yet chosen your pension provider. Click here to select the pension provider and complete the sign-up.

Step 3: Select 'Collegia' and click the 'Set-up Payroll Only' button.

Pension Provider List

Smart Pension
All AE related processes except Opt-Out and Opt-In are processed by Primo Payroll. All communications will be done by Smart Pension on behalf of the Employer.

Collegia
All AE related processes except Opt-Out are processed by Primo Payroll. All communication to employees will be done by Primo Payroll and Collegia.

Providers using PensionSync
Data to the following pension providers are routed through PensionSync. All AE related process except Opt-out are processed by Primo Payroll. There is no fee for employers. All communication will be done by Primo Payroll on behalf of the employer.

- NEST
- NOW
- Legal & General
- The People's Pension
- AVIVA

Set-up Payroll Only
Sign-up
Close

Step 4: In this screen, fill-in your company details. The 'Company Number' is the Company Registration Number. If you need help, click the help button 'Where to find the company number?'

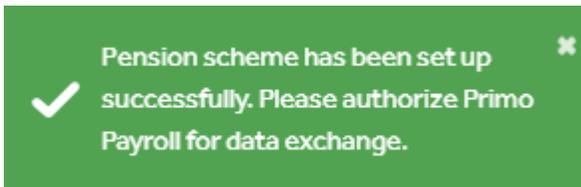
As Collegia operates a 'Relief at Source' method, this option is selected by default. Click the dropdown to select the pension calculated on, Apply Postponement, and the Salary Sacrifice scheme type. Once completed, click the 'Connect' button.

Connect - Collegia Pension Connect Close

Company Number	<input type="text"/>	Where to find the company number?
Tax-Relief Method	Relief at Source	
Pension Calculated On?	Qualifying Earnings (Banded) ▾	
Apply Postponement?	Yes ▾	
Postponement Days	30 ▾	
Apply Postponement to all employees?	Yes ▾	
Salary Sacrifice?	No ▾	

Step 5:

A confirmation message will appear upon successful set up. The program will automatically open a new tab redirecting to the Collegia website where you need to log into your Collegia account and authorise Primo payroll for submitting data. Once authorised, you'll be able to submit the pension contributions from Primo Payroll.



Note:

- Collegia Pension operates the tax relief method 'Relief at Source'
- Opt-in requests should be done from Primo Payroll.

2 ENHANCEMENT

2.1 XERO INTEGRATION

When the user tries to download the amended or newly created 'Accounts' on Xero into Primo, the program will ask the user to select a date from which it can download the accounts that were amended/created. Once downloaded, these accounts will appear on the top of the list being highlighted.

3 SUPPORT

We welcome any suggestions for improvements to the software. Please send an email to the below mentioned email address if you have any questions, feedback or suggestions

If you are experiencing any issues with the software please email the support team at support@accentra.co.uk before you call. This will generate a support ticket and allow our team to respond promptly. Please include your Payroll company ID and contact details in the email.

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