



Sage Micropay Pension Setup

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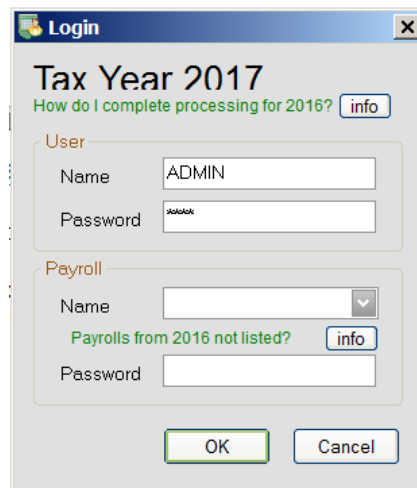


Business Partner

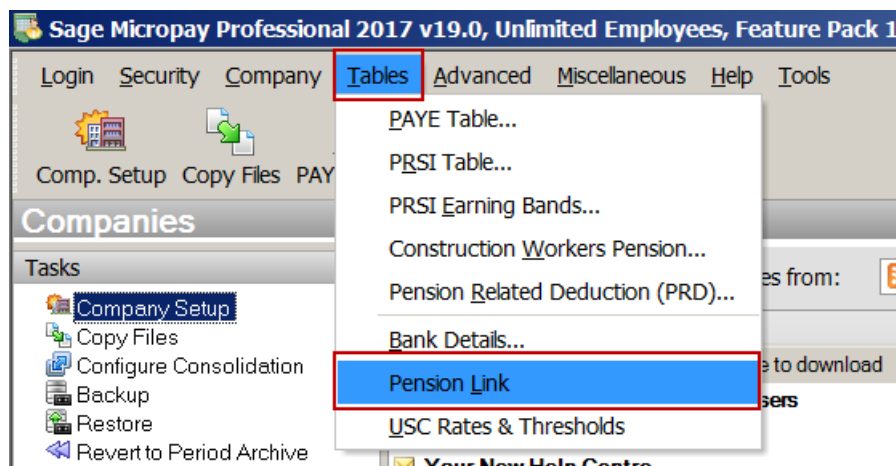
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Ensure that Pensions are set up correctly

1. To set up a pension link, begin by logging in as ADMIN
(The default password is PASS, but this may have been changed on your system).



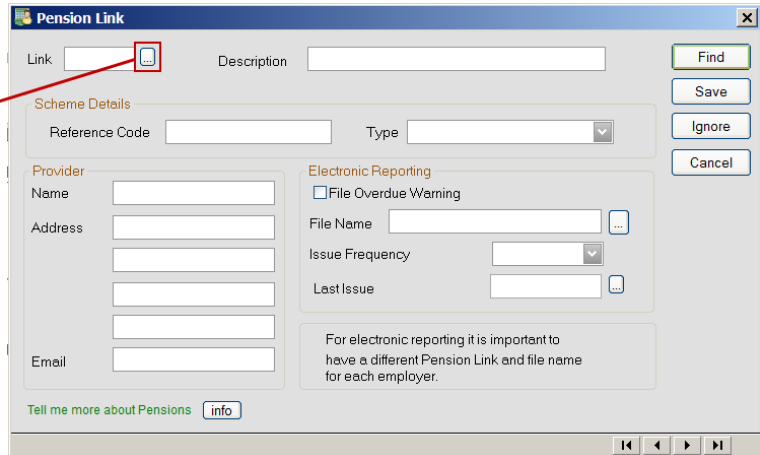
2. Select **Tables – Pension Link** menu option.



3. Check if an existing pension link exists by clicking on 

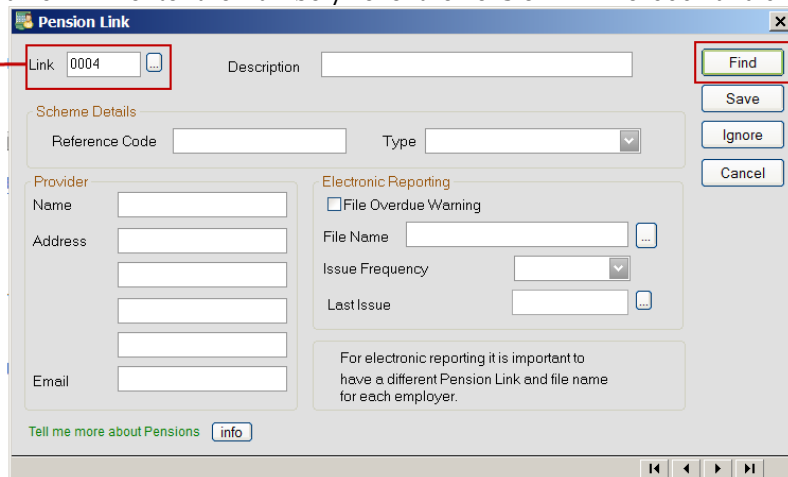
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A drop down list will appear if pension links are already set up or enter in a new no. to create a new link (see step 4).

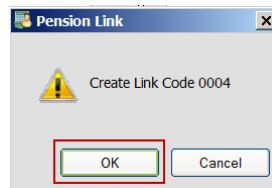


4. If a link doesn't exist or you need to create a new link enter the Number/Ref of the Pension Link i.e. 0004 and click on Find.

Enter the next free Number



5. It will then prompt you to Create Link Code 0004, Click **OK**.

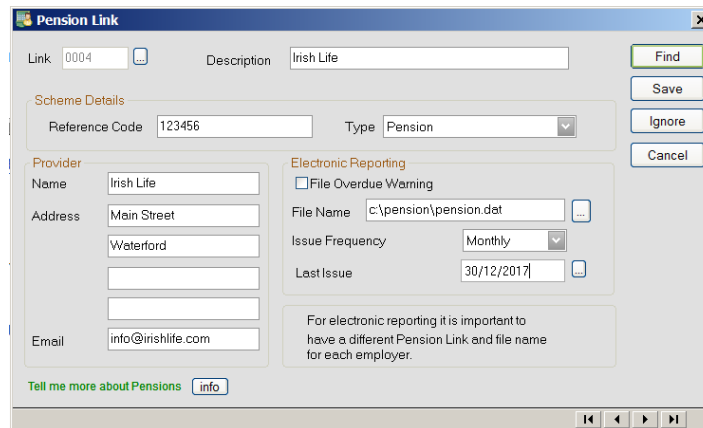


6. Fill in the Details of your pension link:

- Description
- Reference Code – This would normally be provided by your pension company
- Type*
- Name
- Address
- Email

In the Type drop-down list box, specify whether the link is CWPS, Pension, PRSA, PRSA (Excl ER USC), or RAC. You need to have a separate Pension Link, for each pension type, if you have more than one.

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Pension Link

Link: 0004 Description: Irish Life

Scheme Details
 Reference Code: 123456 Type: Pension

Provider
 Name: Irish Life
 Address: Main Street, Waterford
 Email: info@irishlife.com

Electronic Reporting
 File Overdue Warning
 File Name: c:\pension\pension.dat
 Issue Frequency: Monthly
 Last Issue: 30/12/2017

For electronic reporting it is important to have a different Pension Link and file name for each employer.

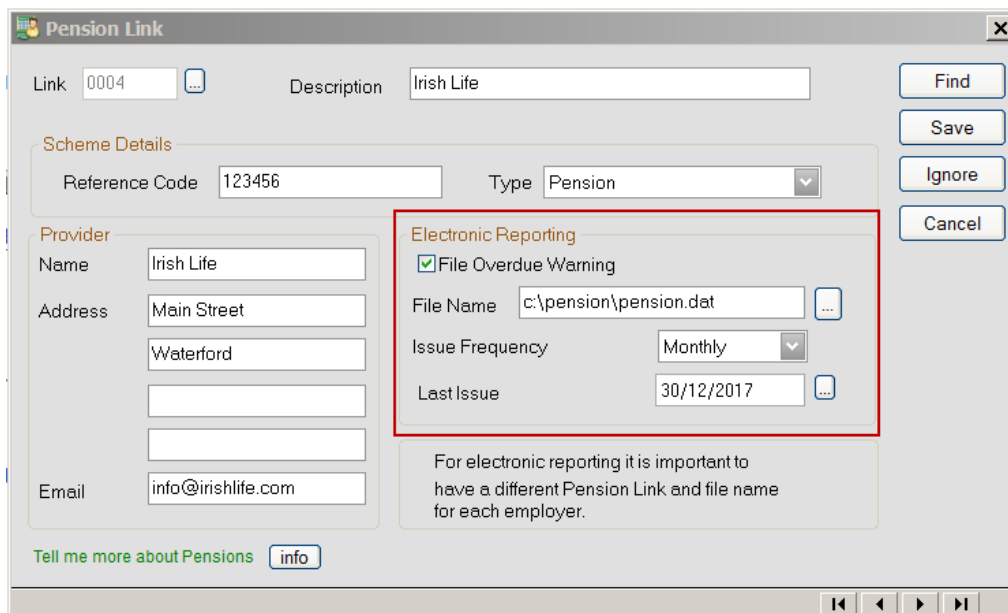
Tell me more about Pensions info

***N.B. You must create a pension link for each pension type in your payroll.**

7. The Electronic Reporting facility is available for electronic reporting and sending a pension file.

Fill in the Electronic Reporting Details:

- File Overdue Warning – Tick this checkbox to be reminded to submit your file
- File Name – Specify the name of the Pension Contribution Transfer File and where it should be saved.
- Issue Frequency – This is the frequency that the pension file Report is required.
- Last Issued – This displays the last date on which the pension file was sent.



Pension Link

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Scheme Details
 Reference Code: 123456 Type: Pension

Provider
 Name: Irish Life
 Address: Main Street, Waterford
 Email: info@irishlife.com

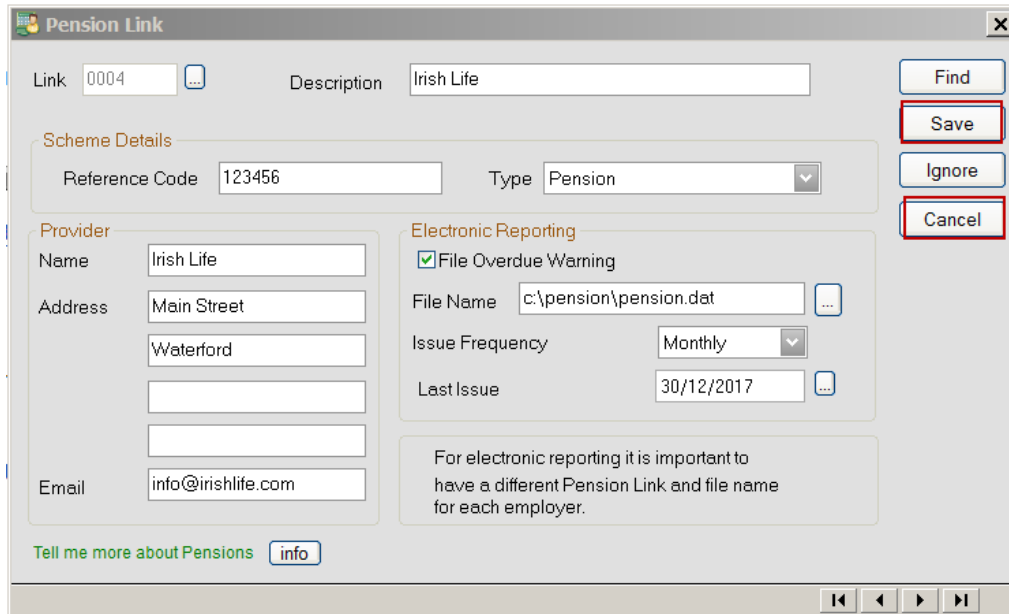
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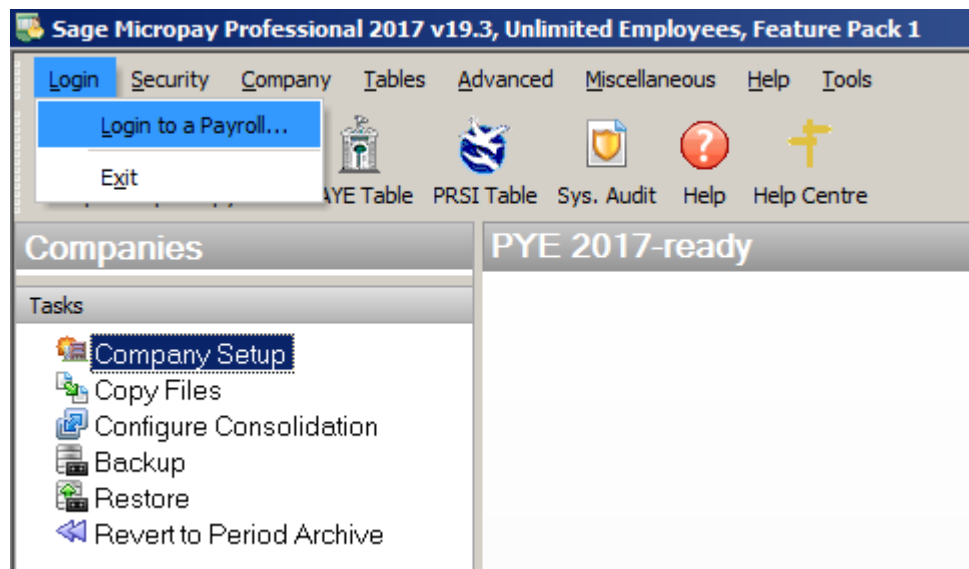
Tell me more about Pensions info

8. Click **Save** and **Cancel** to close the screen.

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9. Log back into your payroll by selecting **Login** and **Login to a Payroll**.

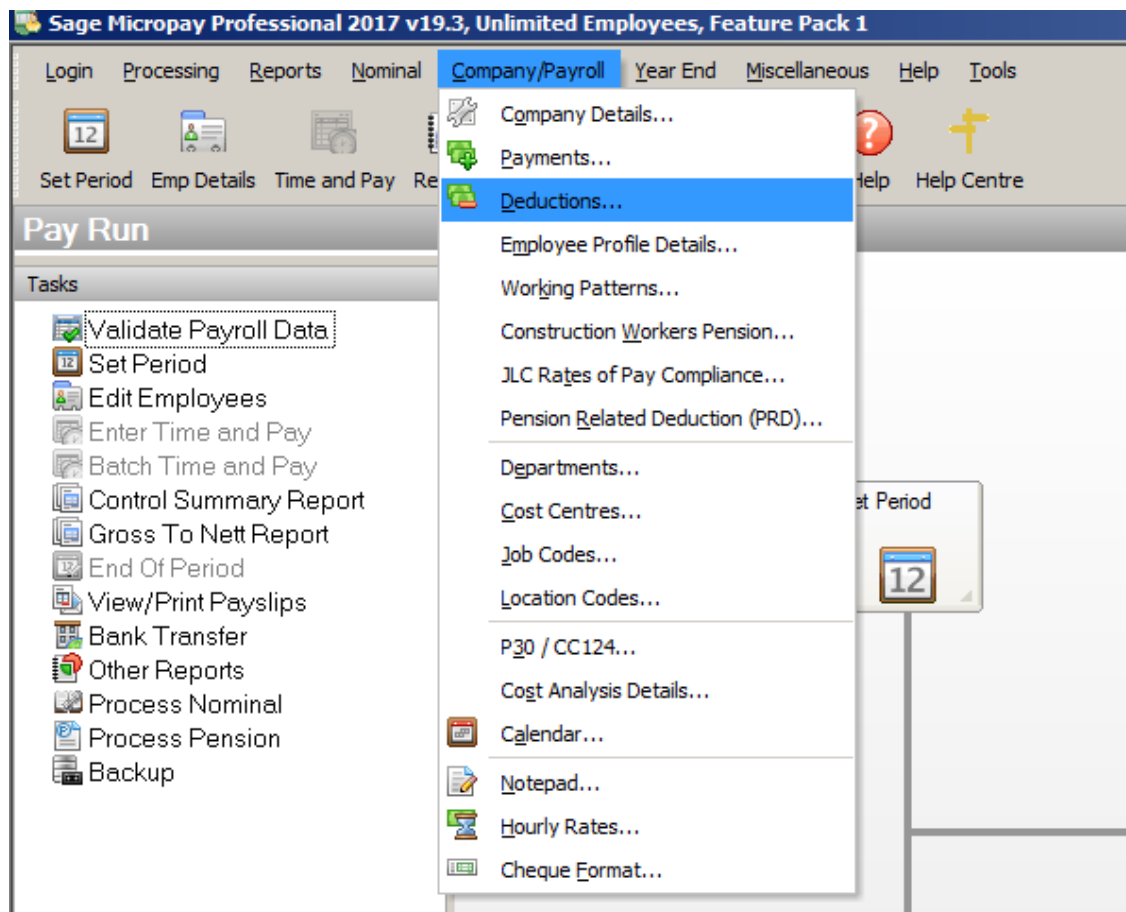


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10. log back into your payroll with your usual user name and password.

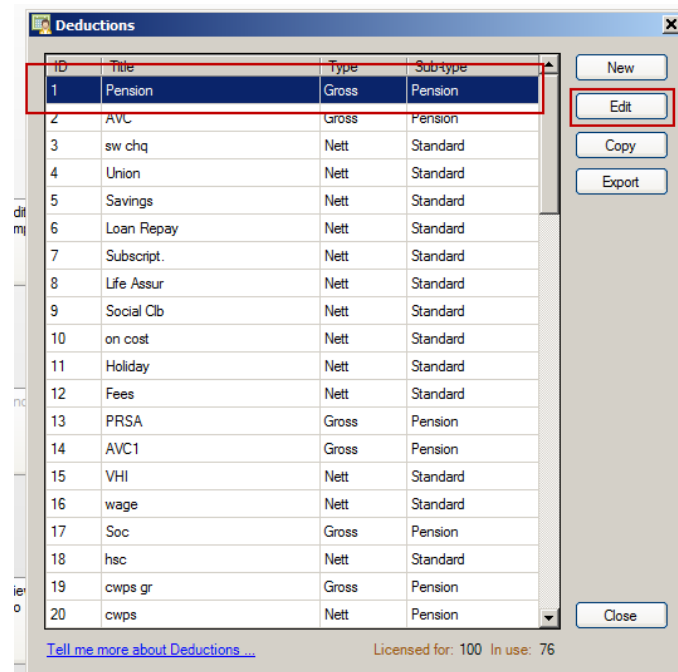


11. Click on Company/Payroll and Deductions

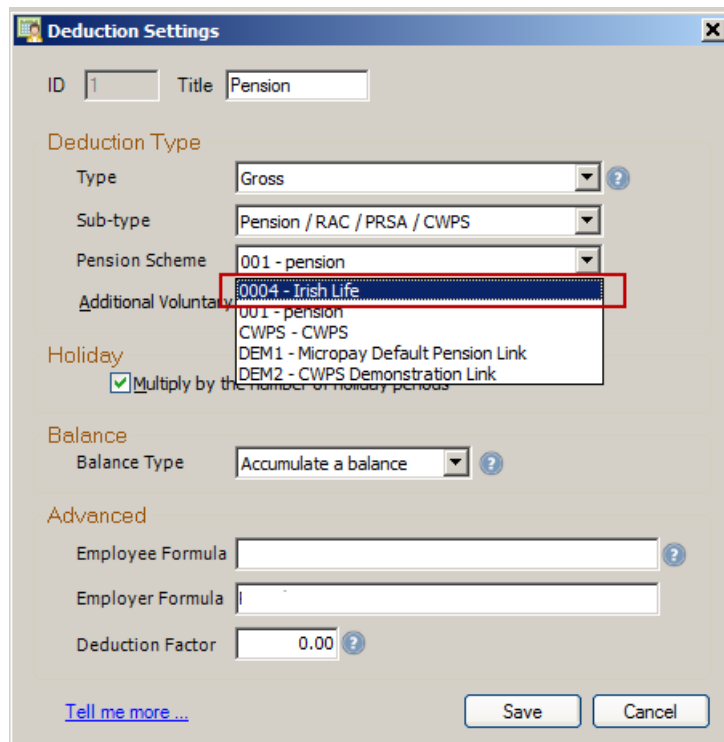


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12. Highlight the Pension Deduction you are using and click on Edit

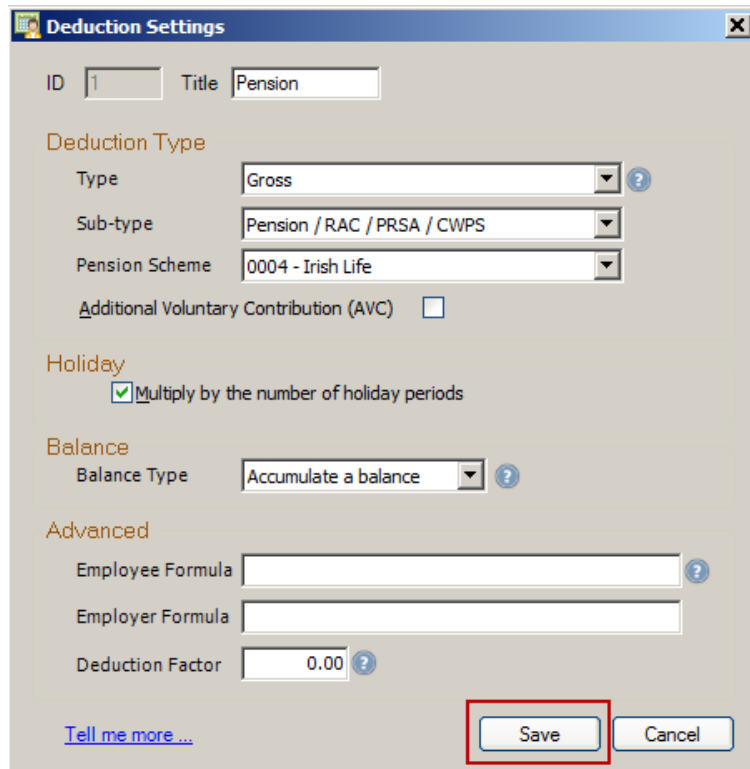


13. Select the pension link you have just created in the drop down menu.



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14. Click Save



Deduction Settings

ID: 1 Title: Pension

Deduction Type

Type: Gross ?

Sub-type: Pension / RAC / PRSA / CWPS

Pension Scheme: 0004 - Irish Life

Additional Voluntary Contribution (AVC)

Holiday

Multiply by the number of holiday periods

Balance

Balance Type: Accumulate a balance ?

Advanced

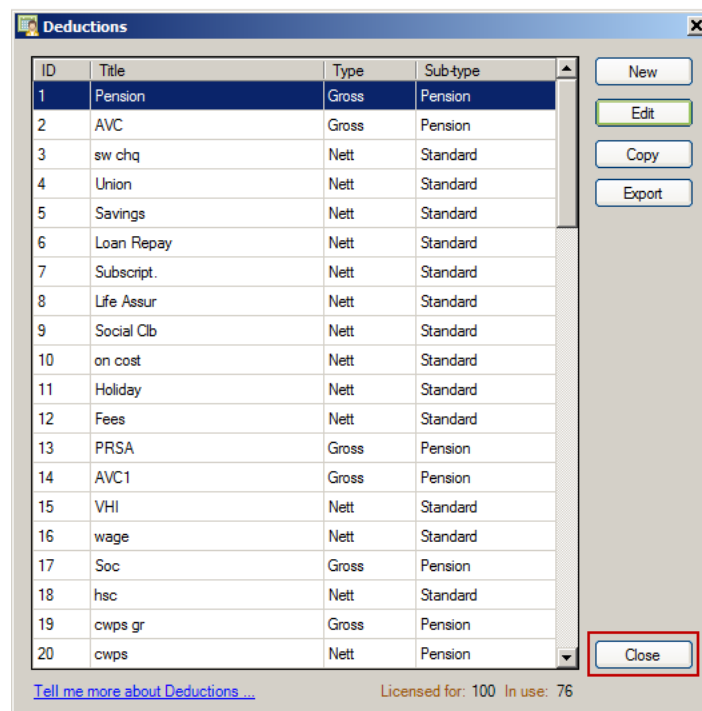
Employee Formula: ?

Employer Formula: ?

Deduction Factor: 0.00 ?

[Tell me more ...](#) **Save** **Cancel**

15. Click Close to finish.



Deductions

ID	Title	Type	Sub-type
1	Pension	Gross	Pension
2	AVC	Gross	Pension
3	sw chq	Nett	Standard
4	Union	Nett	Standard
5	Savings	Nett	Standard
6	Loan Repay	Nett	Standard
7	Subscript.	Nett	Standard
8	Life Assur	Nett	Standard
9	Social Clb	Nett	Standard
10	on cost	Nett	Standard
11	Holiday	Nett	Standard
12	Fees	Nett	Standard
13	PRSA	Gross	Pension
14	AVC1	Gross	Pension
15	VHI	Nett	Standard
16	wage	Nett	Standard
17	Soc	Gross	Pension
18	hsc	Nett	Standard
19	cwps gr	Gross	Pension
20	cwps	Nett	Pension

New **Edit** **Copy** **Export**

Close

[Tell me more about Deductions...](#) Licensed for: 100 In use: 76