



Welcome

Welcome to the Spring newsletter for users and partners of Datafile Software.

If you have any suggestions for topics you would like to see covered in future newsletters please contact the team via the email address below.

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Payroll 2017-2018

The Datafile Payroll Update for 2017/18 was made available in March and all users should now have been updated.

The update includes changes for

- PAYE Tax from 6th April 2017
- National Insurance from 6th April 2017
- Statutory Payments from 6th April 2017
- Benefits in Kind / Company Car Recording
- Apprenticeship Levy
- Employee Assessment for Pension Enrolment

Some of the new features are discussed in this newsletter.

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We have also extended are available Payroll Additions. Payroll Additions available include:

- HR Management options to allow recording and reporting of Asbscences, Appraisals and Skills, Benefits and Property, Disciplinary and Staff Expenses. New for 2017
- Payroll Plus Allows up to 80 Payment/Deduction "Switches" and up to 20 overtime bands.
- Pension Accessory Allows up to 10 Company Pension Schemes
- People's Pension Allows creation of the assessment files for upload to the Peoples Pension and the import of calculated pension contributions.
- NEST Pension Allows creation of enrolment and contribution files for upload to NEST





Benefits in Kind (Company Cars)

From the start of the 2016/2017 tax year employers could choose to register with the HMRC and to account for the tax on benefits in kind through PAYE each pay day. Details are available from the HMRC website <u>here</u>.

In summary, this option increases the employees taxable pay to include the benefit in kind value rather than having the HMRC reduce the employees tax code. It also avoids the requirement, in some circumstances, to submit a P11d.

In 2016/2017 Datafile introduced a new extra payment type 'B-Benefits in Kind'. The Benefit in Kind value is included within the Employee Gross Additions and Taxable Pay values resulting in an increased tax contribution by the employee but does not affect the employee's net pay, except for the increased tax deduction, as a usual extra payment switch would.

As part of the changes in 2017/2018 if the employer is registered to account for tax through PAYE then where the benefit relates to a company car then HMRC is, currently optionally, requesting that the Full Payment Submission includes detail for the company car. As such when updating employee details if the extra payment is configured as a Company Car BiK you will be prompted for the company car details.

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Details prompted will be familiar to those used to recording these details on-line via the HMRC website.

If a car is withdrawn or replaced during the tax year you can update the withdrawal dates for the original car and create a new entry for the new car. Up to four changes of car are supported for the employee within the tax year.





Apprenticeship Levy

As an employer you will have to pay the Apprenticeship Levy each month from the 6th April 2017 if you:

- Have an annual pay bill of more than £3 million
- Are connected to other companies/charities for the Employment Allowance which in total have an annual pay bill of more than £3 million

Your annual pay bill is all payments to employees that are subject to employer Class 1 secondary National Insurance Contributions. You must include payments to all employees including those earning below the LEL/ST National Insurance thresholds, employees under the age of 21 and apprentices under the age of 25. It doesn't include employees under the age of 16, employees who are not subject to UK NICs legislation nor earnings on which Class 1a NIC are payable (i.e. BiKs)

Employers who aren't connected to another company/charity will have an Apprenticeship Allowance of £15,000 per annum. The allowance reduces the amount of Apprenticeship Levy you should pay by £15K per year.

The Apprenticeship Levy is charged at 0.5% of your annual pay bill.

For the first month of the tax year this is calculated by:

- 1. Dividing the Apprenticeship Levy Allowance by 12
- 2. Subtracting this figure from 0.5% of your monthly pay bill.

For each of the following months it is calculated by

- 1. Calculate your total pay bill for the year-to-date
- 2. Add up your monthly levy allowances for the year-to date
- 3. Subtract the levy allowance from 0.5% of your total pay bill for the year-to-date
- 4. Subtract the amount of levy you've already pay in the year-to-date

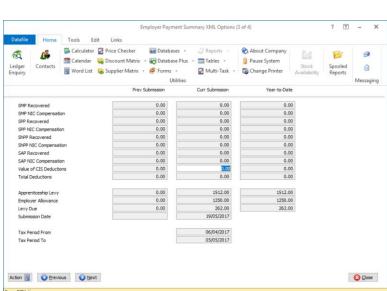
From 6th April you will need to inform the HMRC how much Apprenticeship Levy you owe each month if your annual pay bill was more than £3 million last year or you think this years pay bill will be more than £3 million. If your annual pay bill unexpectedly increases to more than £3 million then you should start reporting this straight away – you will need to monitor manually for this.

Employer Payment Summary (EPS) – you report the Apprenticeship Levy using the EPS submission options. Previously you would only have needed to submit this form if any statutory payments needed to be recovered but once set to calculate and apply the levy then you will need to submit an EPS each month.

As part of submitting the EPS the Datafile Payroll system will determine the total pay bill for the year-todate, add up your monthly allowance relative to the current tax month, subtract the year to date levy amount from 0.5% of the total pay bill and then subtract the levy amount paid to date.

The calculated levy should be paid to the HMRC as part of your normal monthly payment.

NB: Variances in pay bill may mean the year-to-date due



reduces and the levy for the current tax month is negative. This amount can then be offset against your monthly payment.





Employee Assessment for Pension Auto-Enrolment

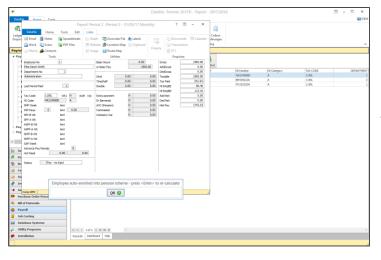
A new facility has been added to the Datafile Payroll for the pension auto-enrolment assessment. This option ties in with the Company Pension Scheme(s) that can be defined within the Payroll.

Employee Maintenance / Add an Employee – as part of adding the employee the system will set when the New Worker postponement period ends (based on employee date started and postponement settings). Employee Maintenance can also include options to specify if employees are working outstide the UK or are already in applicable scheme so not covered by the scope of auto-enrolment.

As part of auto-enrolment selected employees who are not automatically enrolled can choose to Opt In – for these employees you need to be able to record an Opt In Date and set the contribution rates.

Similarly, employees who are enrolled can choose to Opt Out or Stop Contributions. Opt Out availability is restricted to a few days since auto-enrolment and allows the employee and employer to be refunded with their contributions, stopping contributions is available at any time but the employee/employer is not refunded.

You are likely to use a Payroll Extra Maintenance Screen for these options.



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Payroll Input - When saving the employee details if the employee is not already auto-enrolled then on saving the employee record the system will perform the auto-enrolment checks.

If the employee should be auto-enrolled then, if any jobholder postponement period is set, the postponement period end date is set and the pension contributions are not calculated.

If the employee should be auto-enrolled and no postponement is set (or has expired) the system will apply the default employee/employer contribution rates and prompt to recalculate the payroll values (reconfirming the entered details)

Payroll Check / Payroll Run - As part of the Payroll Check / Run report the system will also apply the auto-enrolment checks for employees not already auto-enrolled – applying postponement period and setting default contribution rates as appropriate. Note that employees 'auto-enrolled' as part of the check/run report will be highlighted accordingly.





Payroll Additions

Staff Absence Management

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Absence can be logged against each employee and calculated against a simple working time calendar. Standard reports in the system include reviewing by Employee / Department / Absence Types etc.

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Excel reporting is fully supported and can provide a more visual analysis.





Appraisals / Skills / Training

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Appraisals can be logged and the employee mailed with a documented copy.

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Details of employee training or skills can be recorded and Certification scanned in. Picklist reminders can set for recertification or re-training anniversaries.





Employee Benefits and Equipment

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Benefits in Kind details such as Company Vehicles and Private healthcare may can be logged against an employee and then reported on as the basis for preparation of forms P11d.

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When an employee is issued with company property such as Laptop or Mobile phone then this can be recorded and tracked.





Disciplinary

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Actions can be recorded and set with an expiry date. These can be merged with standard ACAS MS Word templates.

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Mail Sales Account	Last Disciplinary 20/01/17					
S Purchase Account	Disciplinary Type Verbal Warning					
Nominal Account	Expiry Date 20/01/17					
Stock Record						
Product Record						
👺 Employee	Pay-Period C-Taxable C-NatIr					
Contract Record	1 2000.00	0.00 13/11/2013 Staff Handbook v1.3 13/11/2013 Staff Employment Contract v1.3				
🗣 Sales Order	2 2510.00	0.00 0.00 0.00				
🧼 Purchase Order	A 2000.00	66.48				
🏟 Cash Account	5 4500.00 5·	40.00				
🍬 Works Order						
4 CRM						
A Location Enq	<	>				
31 Calendar						
Se Change Company	Action 📑 🚺 Documents Transactions	Calendar Timesheets Another Select Ocean				

All aspects of the HR accessory can be brought together in a single form within each employee.