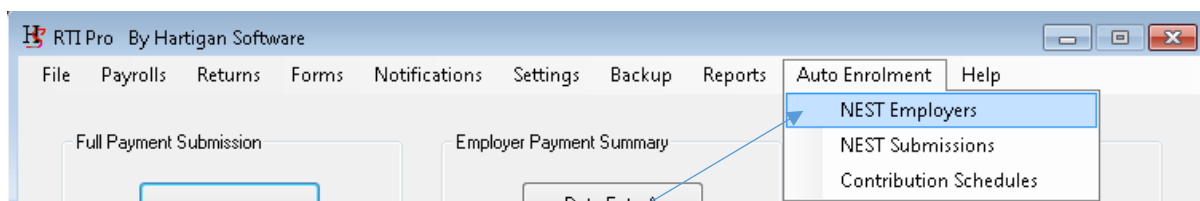


Setting up NEST employer records



Click the [Auto Enrolment \ NEST Employers] menu. The following screen is displayed:

Enter all or part of the Organisation Name or NEST Employer Ref in the boxes on the left and press the [Find] button to search for a record or filter the list.

This is the unique employer identifier given to you by NEST when setting up your employer record. The 12 character reference is displayed on most screens when you are logged into your NEST account. E.G. EMP123456789. The reference is case sensitive so make sure that you use capital letters where required – 'EMP' not 'emp'.

The screenshot shows the 'NEST Employers' window. On the left, there is a search area with 'Organisation Name' and 'NEST Employer Ref' input fields, a 'Find' button, and an 'Add New' button. Below this is a table of employer records. On the right, there is a 'NEST Employer Details' section with input fields for 'NEST Employer Reference Number', 'Organisation Name', 'NEST User ID', 'NEST Password', and 'PAYE reference'. At the bottom right, there are 'Save', 'Delete', and 'Close' buttons. Arrows from the text boxes point to the search fields, the 'Add New' button, the 'Save' button, and the 'Delete' button.

Organisation Name	Employers Ref
HSD Support	EMP000033013
HSD Test 01	EMP000033028
HSD Test 02	EMP000033108
HSD Test 03	EMP000033111
HSD Test 04	EMP000033112
HSD Test 06	EMP000033114
HSD Test 07	EMP000033115

This list will contain the names of all NEST employer records previously entered. Click the name to load the selected record.

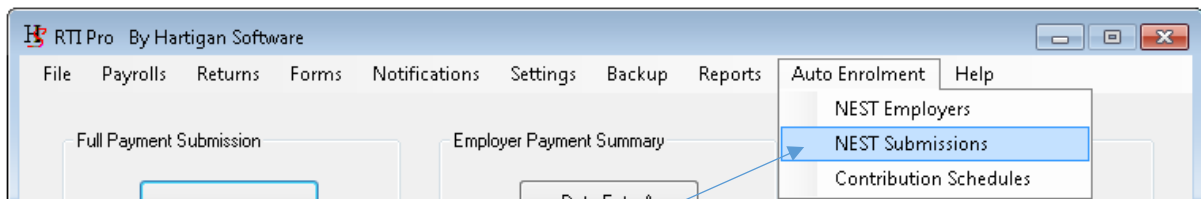
Click 'Add New' to clear currently displayed data from the right hand side of the window and enter new a new NEST employer record.

Click [Save] to save the selected record.

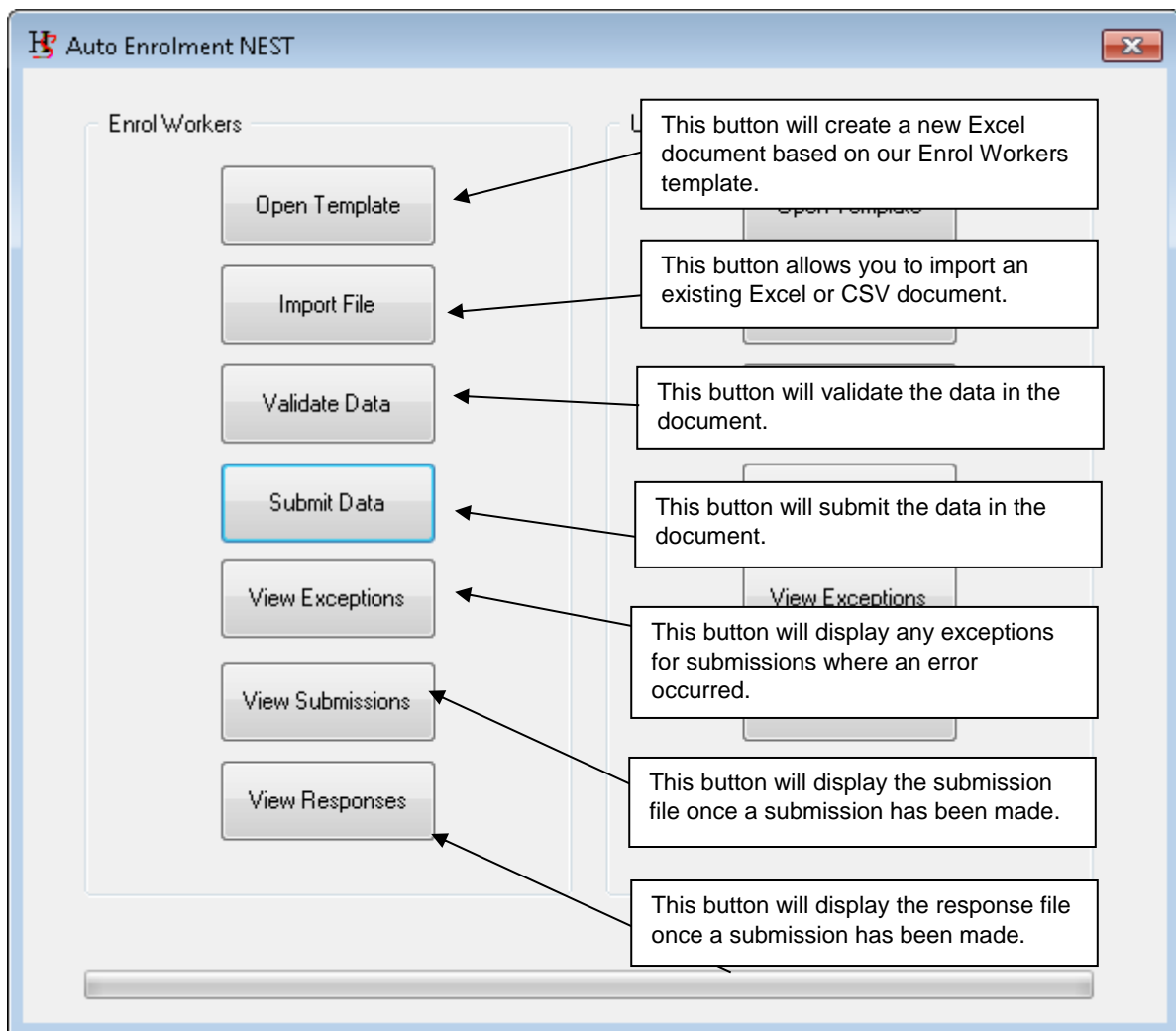
Click [Delete] to delete the selected record.

Click 'Add New' and enter the information on the right hand side of the screen. Click 'Save' to save the information entered. Continue until all required NEST employer records have been set up.

Enrol Workers into NEST



Click the [Auto Enrolment \ NEST Submissions] menu. The following screen is displayed:

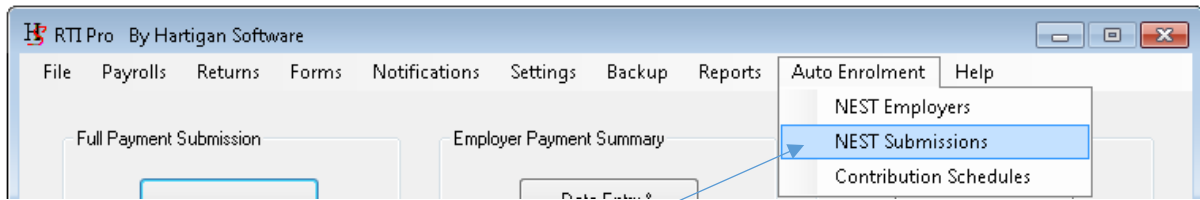


Workers can be enrolled for more than one employer in a single import file.

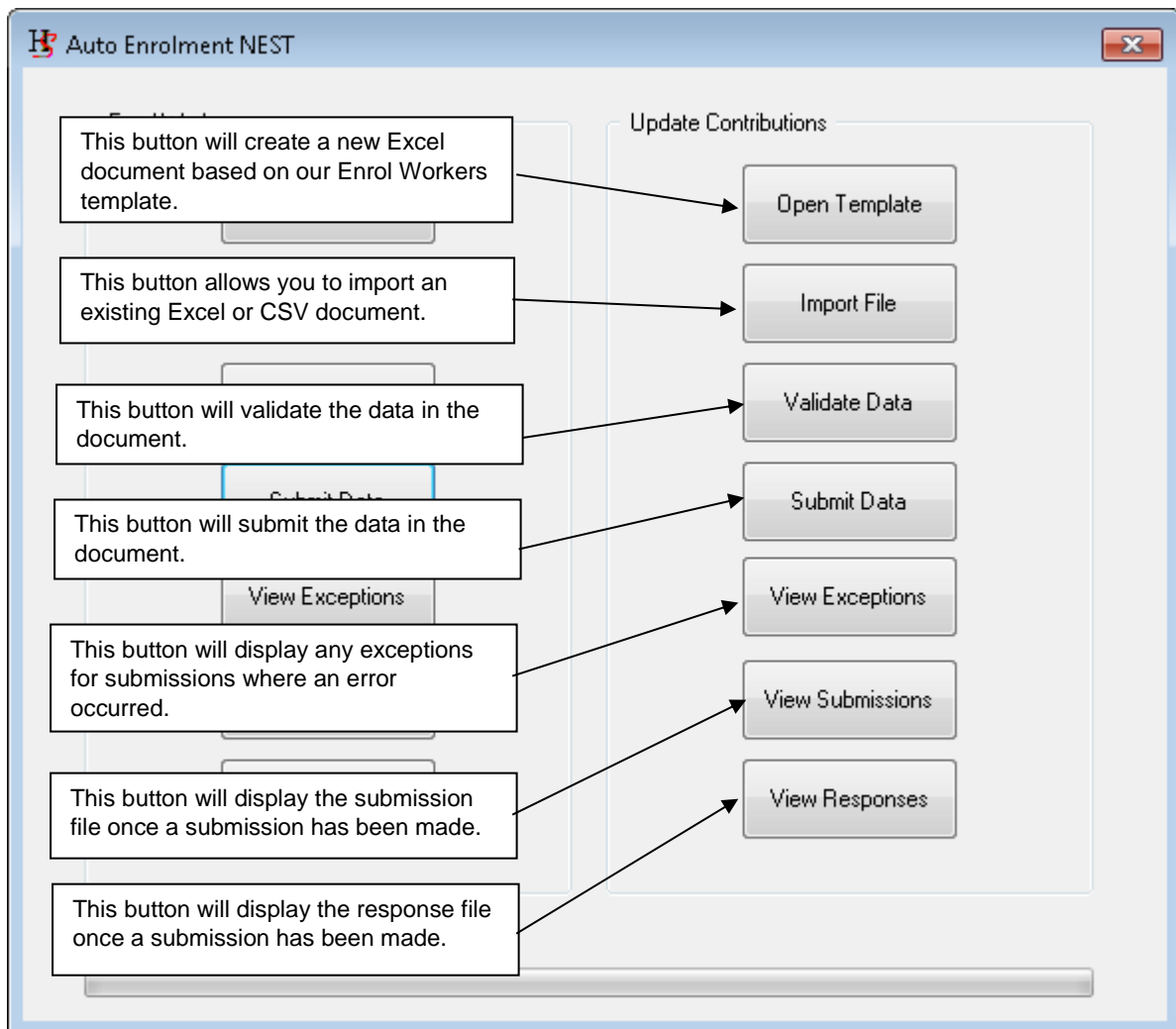
Please refer to the NEST Import File Guide document for details on the fields that need to be populated in the Enrol Workers template.

Please refer to the [Submitting the file(s)] section for further details of the submission process.

Update NEST Contribution Schedules



Click the [Auto Enrolment \ NEST Submissions] menu. The following screen is displayed:

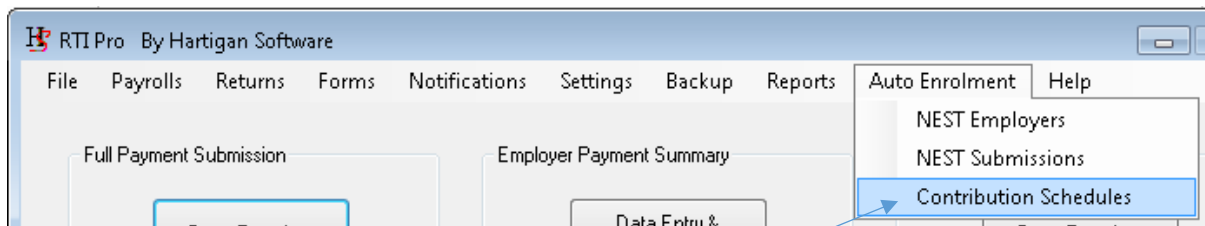


Contribution schedules can be updated for more than one employer in a single import file.

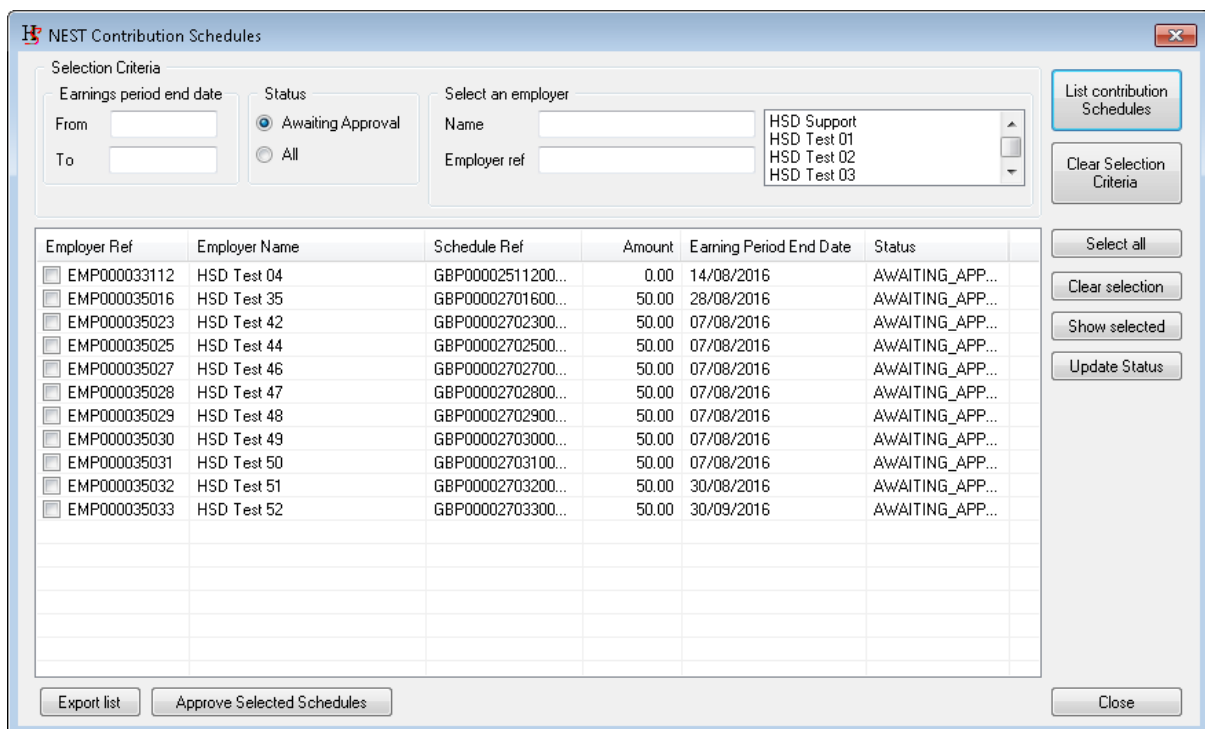
Please refer to the NEST Import File Guide document for details on the fields that need to be populated in the Update Contributions template.

Please refer to the [Submitting the file(s)] section for further details of the submission process.

Approve Contribution Schedules



Click the [Auto Enrolment \ Contribution Schedules] menu. The following screen is displayed:



Enter the selection criteria to list the contribution schedules. The default is to list all contribution schedules for all employers that are awaiting approval.

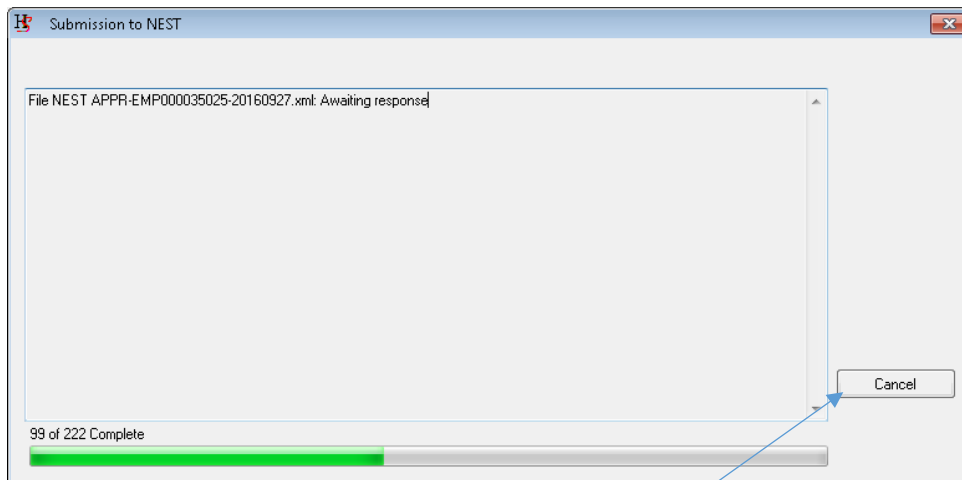
Either select the contribution schedule by ticking the box in the list or press the [Select All] button.

Press the [Approve Selected Schedules] button to begin the submission to NEST. Please refer to the [Submitting the file(s)] section for further details of the submission process.

The status of the Contribution Schedules can be updated manually by clicking on an item in the list and pressing [Update Status] button. This process is primarily for housekeeping purposes and can be utilised if the contribution schedule has been approved directly on the NEST website or if it was created in error. Please note that this will only update the status of the contribution schedule in the submission software and not on the NEST website.

Submitting the file(s)

The following screen is displayed when the files are being submitted to NEST:

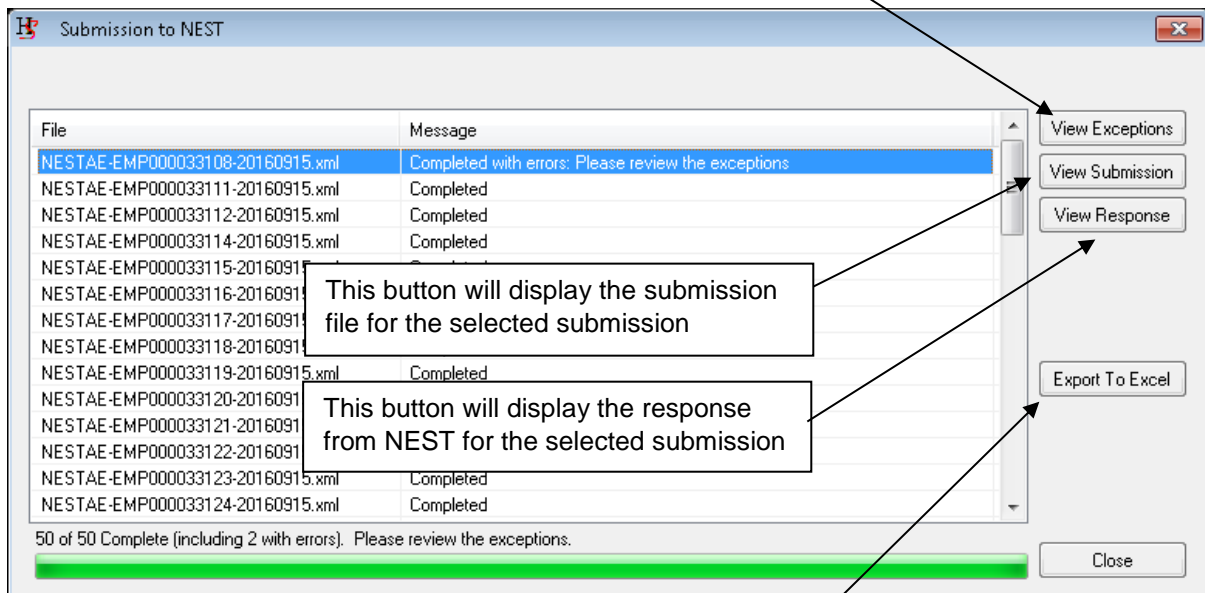


The process can be cancelled by pressing the [Cancel] button

The progress bar on the bottom of the screen will provide an update on the progress of the batch as a whole and will advise if there are any errors.

The screen will update to display a list of submissions when the submission process is complete:

This button will display the exceptions for all submissions where an error occurred.

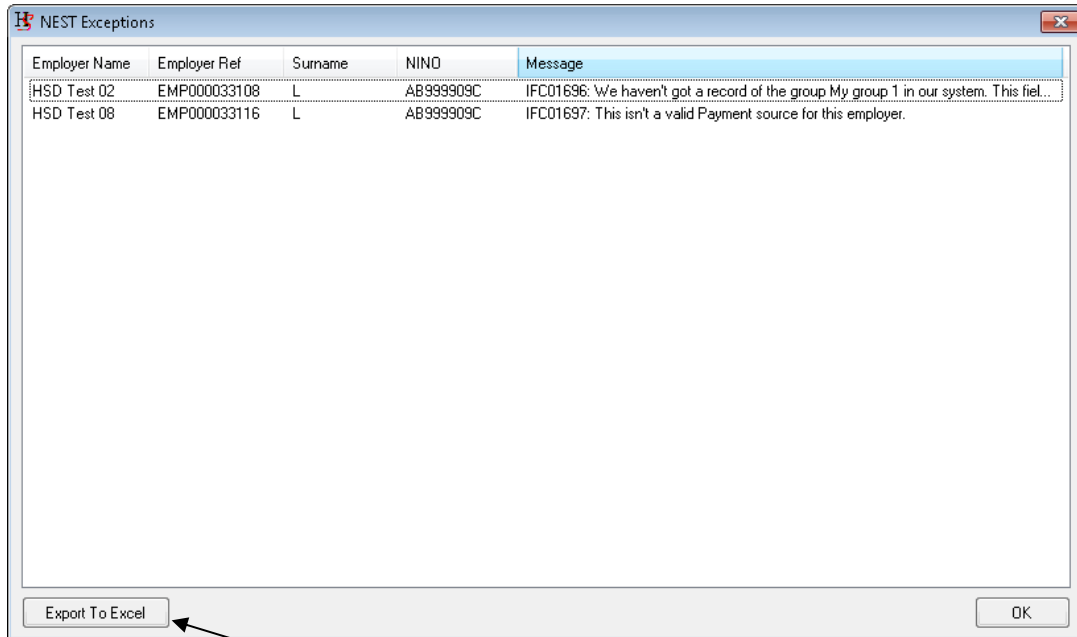


This button will display the submission file for the selected submission

This button will display the response from NEST for the selected submission

This button will export the items in the list to Excel for further analysis.

Clicking the [View Exceptions] button will list the exceptions for all submissions where an error occurred. See the following screen shot for an example of this:



The screenshot shows a window titled "NEST Exceptions" with a table of data. The table has five columns: Employer Name, Employer Ref, Surname, NINO, and Message. There are two rows of data. Below the table, there is an "Export To Excel" button and an "OK" button. An arrow points from the "Export To Excel" button to a text box below the window.

Employer Name	Employer Ref	Surname	NINO	Message
HSD Test 02	EMP000033108	L	AB999909C	IFC01696: We haven't got a record of the group My group 1 in our system. This fiel...
HSD Test 08	EMP000033116	L	AB999909C	IFC01697: This isn't a valid Payment source for this employer.

The list can be exported to Excel for further analysis.