

Getting started with Superpay 4

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1. First run

1.1 Requirements

To run Superpay 4 you need Windows XP Service Pack 2, Windows Vista, or Windows 7. You also need the Microsoft .NET Framework version 3.5 SP1.

The easiest way to get the .NET Framework is to go to www.smallestdotnet.com. This will tell you the Framework version you currently have, and provide a link to get the current version if needed.

1.2 The first time you run Superpay

When you run Superpay for the first time you will be asked three questions.

You must accept the licence agreement for the software.

You must enter the licence number we have supplied you with.

You can store your data on the local machine, on a network share, in a Microsoft SQL Server database.

If you choose network, enter the path where your Superpay database will be created.

If you run Microsoft SQL Server and you would like to store your Superpay data there, choose that option and enter the name of the server.

1.3 Permissions for Microsoft SQL Server

If you are using Microsoft SQL Server, some permissions have to be set up for Superpay.

The first time Superpay is run it creates the database, so your Windows account needs to have 'create database' permission within SQL Server. Once the database has been created, the administrator needs to set read and write permissions on the Superpay database for the payroll operators.

2. Finding your way around

The program menus are laid out in a very similar way to Superpay 3.

Dates are entered as dd/mm/yyyy, for example 20/08/2009.

The main menu has a new item for agents.

In year filing and retrieval of notifications like P6's are in the agents menu and in the employee records menu. If you file as an agent, set up agent details and use the filing options in the agents menu. If you file for your own company, use the filing options in the employee records menu.

On screens where there was previously a list of options across the bottom (F9 Store, F10 Print, etc) there is now a single choice of F2 for Actions. Pressing F2 gives a list of the actions that are available.

When entering some fields, such as payslip style or passwords, an additional option (usually F7) will appear at the bottom of the screen. You can use this to pick a value from a list.

If you enter a question mark in the company number or employee number fields and press return, a list of companies or employees will be displayed. We will improve this list in future versions to allow searching by name or number.

3. Some things to set up first

The utilities menu lets you set up printer details, payslip style, and a few other options.

3.1 Printers

If you don't set up any printers in Superpay, the program will use the default printer as set in Windows. To set a different printer, or to have different reports on different printers, choose 8 for utilities from the main menu, then 2 for printer control.

For each report or form you can set the default destination to be a specific printer, a screen viewer, or a file on disk. When you print a report you are presented with a list of destinations, but your choice from this printer control screen will be at the top of the list. If you choose 'Ask for printer' you will be shown a list of available printers when you print.

To set a specific printer, press F2, choose Print, and select the printer from the list that is displayed.

If you print everything to the same laser or inkjet printer, set that printer on the 'Plain paper' line. There is only any need to set other forms if you want them to always go to a different printer.

Continuous payslips can only be sent to a parallel printer port (e.g. LPT1:) or to a file. We will add a means of sending them to the screen later.

3.2 System settings

The choices on this screen are applied to all users of Superpay.

Here you can set the default payslip style for all your companies.

3.3 User settings

The choices on this screen apply only to the operator of this computer.

You can set test or live for Revenue Filing, the employee sequence for payroll run, and whether to display passwords while you type them. The database location field is not currently used.

4. Import your data from Superpay 3

Ensure that the date you entered when you started Superpay is in the 2009/10 tax year. Choose number 6 (Import from Superpay 3) from the Utilities menu, and enter the name of the folder where your Superpay 3 data files are stored.

Superpay will display a list of companies with data in the 2009-10 tax year. Next to each one is a yes/no choice. You can either enter Y or N next to each company, or use the F2 option to turn all the selections on or off.

Each company will be imported in turn. This can take some time if there are many companies or they have a lot of employees,

5. Company record

5.1 Bank details

The bank link file type is now set in company record.

5.2 On-line filing

Enter your Revenue Gateway ID and password here. The next options allow you to exclude this company from year end or in-year filing. If you file as an agent, set the agent options.

5.3 Passwords

You can set up two passwords for a company. The Company password is requested as soon as you select a company, and the Monthly password is requested the first time you access a monthly employee. These correspond to the level four and level two passwords in Superpay 3.

Monthly passwords are not yet implemented. Any password you had in Superpay 3 is transferred but is not currently requested by Superpay.

5.4 Payslips

Press F7 to select the payslip style for this company. You only need to do this if this company uses a different kind of payslips from what is set in System details.

6. Employee record

Some fields have changed, as follows:

- i. The format of pay items hasn't changed.
- ii. The tax code can be left blank, and Superpay will allocate the right tax code when the employee is run.
- iii. A week 1/month 1 tax code is now identified by an X after the code, e.g. 647LX.
- iv. The NI code can be entered as a letter or selected from a list by pressing F7 when on the field.
- v. Student loan is now a yes/no choice rather than an after tax item of *S.
- vi. A choice called PAYE can now be used to exclude this employee from Revenue filing. In Superpay 3 you could set the employee as a contractor to achieve the same thing.
- vii. The director NI fields now have the date the directorship started, and whether an Appropriate Personal Pension (APP) is held.
- viii. The pay method is now selected from a list.
- ix. Parental leave now supports two leaves in the same tax year. Also there are options for paying in part weeks and for recording the number of KIT days.
- x. Attachments are now selected from a list. The 'Text' field is the description that appears on the pay item. You no longer set up an after tax pay item of '*A3' or similar. Three attachments can be set up.
- xi. NI totals have new fields for the director status and pay over the upper limit. These fields are maintained by Superpay, and (as before) you would only enter them manually when starting a payroll midyear.

6.1 Entering P45's and P46's

When an employee joins and presents a P45 or completes a P46, the details from the form have to be entered into Superpay so that the form can be filed electronically. To avoid entering all these details twice, many of the employee fields can be set up automatically from the form.

When entering a new employee with a P45 or P46, press F2 and choose 'Add a P45' or 'Add a P46' (first you have to enter something in the employee name field – it doesn't matter what). Fill in the details and store them.

Fields like name, address, NI number, etc will be used to set up the same fields in the employee record, as well as being stored in the P45 or P46 details.

7. In-year filing of P45's and P46's

In-year filing is run from the agents menu if you are an agent or from the employee records menu if you are filing for your own company. Ensure you have set up your Gateway user name and password in either the agent or company details.

Choose File P45/P46's to send P45's and P46's for any joining or leaving employees to the Revenue. Press space when prompted to send them.

Use the Filing history option to display the messages sent. The status for newly sent messages will be 'Acknowledged', and you must press F2 and choose Query to get the Revenue response. Superpay does not query automatically the way the Internet Filing program for Superpay 3 does.

8. Revenue notifications for P6's, P9's, and student loan

Notifications are run from the agents menu if you are an agent or from the employee records menu if you are filing for your own company. Ensure you have set up your Gateway user name and password in either the agent or company details. When you retrieve notifications using your agent PAYE reference, you get responses for all of the companies for which the Revenue recognises you as the agent.

Choose Download notifications, and press Space to continue. Superpay will read and store any notifications later than the last one read. The record counts are displayed upon completion.

The Notification history displays the notifications that have been received. Initially they are just stored in the database. When you run payroll, Superpay checks each employee for any stored notifications that apply, and takes the appropriate action (change tax code, start or end a student loan, etc).

The notifications received have to be matched to the employees you have in Superpay. This is done by NI number, works number, and name (in that order). Keep in mind that the NI number is the most accurate match, so having the right NI numbers for your employees will help to ensure that notifications are actioned. A name will only match if it is spelt and punctuated identically in Superpay and by the Revenue.

9. Printing P45's

Superpay prints P45's for employees who are leaving. It prints a three page Revenue designed document onto plain A4 paper. This P45 doesn't include the page that the employer sends to the Revenue, so you must file P45's for leaving employees on line.

To choose which P45's to print enter the earliest leave date. P45's will be printed for all employees who left on or after that date, so there is no need in most cases to enter an employee code range.

10. Year end

At present the only year end option is to display the P35 totals. Year end filing and a printed P35 will be added.

11. Agents

You can set up your agent details by choosing option 9 from the main menu. More than one agent can be created if needed.

Choose an agent number (e.g. 1) and enter the name, address, and Revenue details.