How to for pensions other than PRSAs on Cloudpay

Just a bit more information on setting up pensions. The Quick Setup will set up a PRSA. However, users might want to set up different pension types, like an RBS.

Here is guidance:

Pensions are usually deducted from each pay date, so these should be set up in the employee screen deduction tab (not the elements tab)
(Once off deductions are set up in the Payroll screen)

PRSAs Quick Set up
If you are setting up a PRSA, these can be set up using the Quick Setup button in the employee screen
1. Go to the Employee screen, select the employee
2. Click the 'Quick Setup' button at the top of the screen.
3. Tick the 'Pension - PRSA' option
4. Enter the pension amounts
5. Click the 'Save' button.
6. The PRSA will be automatically set up for the employee

Manually set up PRSAs
PRSA pensions can also be manually set up.
1. Go to the Employee screen and click on the Deductions tab.
2. Click on the first empty deduction row, description column. A drop-down will appear
2. You can set up a PRSA by selecting 'PRSA Pension (Personal Retirement Savings Account)' from the dropdown in the deductions grid. Click the 'Description' column drop-down to see a list of deductions.
3. If it's a per cent deduction, tick the EE % column - for example, 4% or if a flat amount, then untick the EE % column - for example €100

Manually set up all other pensions
1. Go to the Employee screen and click on the Deductions tab.
2. Click on the first empty deduction row, description column. A drop-down will appear
3. Click the 'Description' column drop-down to see a list of deductions. Multiple pension types are listed. Select the appropriate one.
4. If it's a per cent deduction, tick the EE % column - for example, 4% or if a flat amount, then untick the EE % column - for example €100

Check your pension type
To check that the pension type you have set up is correct, click the Hide/Show slider at the top right of the deduction grid so that 'Hide' is displayed.
You will be able to see a 'Type' column. This is the Pension type you have set up.

Available types are:

AVC -- Additional Voluntary Contribution
PEPP -- Pan-European Personal Pension Product
PRSA -- Personal Retirement Savings Account
RAC -- Retirement Annuity Contract
RBS -- Retirement Benefit Scheme

If you have a Pension Tracing Number, this can be entered at the bottom of the deductions grid and will be reported to Revenue in the Payroll Submission

Guidance for setting up elements and deduction can be found here:
https://www.payback.ie/support/quick-tutorials/setting-up-elements-and-deductions/