Employee NI Category

HMRC · https://paiyroll.com/kb/employee-ni-category/

Follow this guide to understand, view or set the employee category.

Automated NI Categories

The majority of employees have a **General** NI category, and the software will automatically generate and change the NI category letter based on their date of birth. No action is required.

Where can I view an employee's National Insurance Category letter?

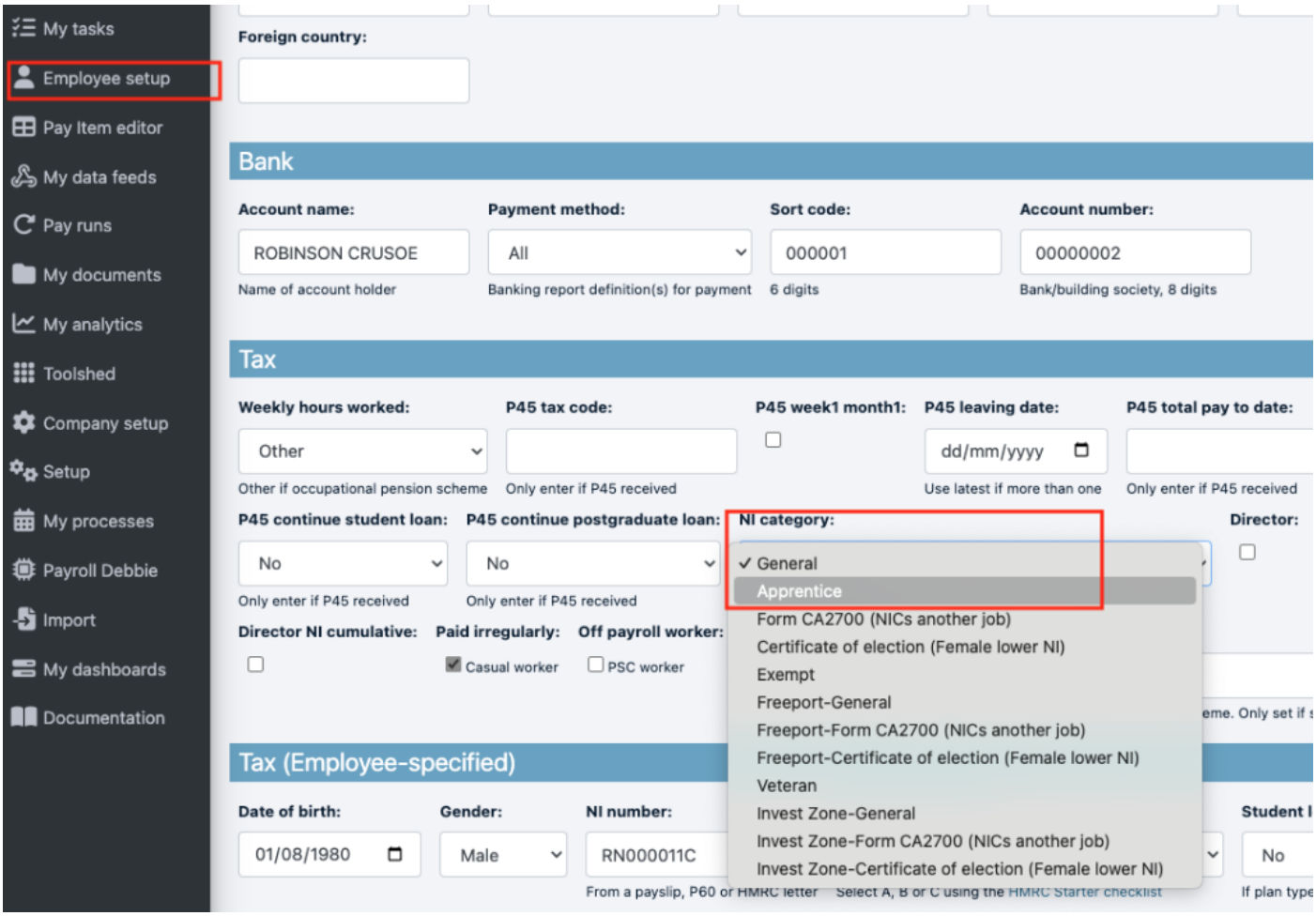
Administrators can view the generated NI category letters on the payslip or the mini payslip in the Pay Item Editor.

Employees can also view these on their live payslip

Manually set categories

These are only required for the following: Apprentice, Exempt, Freeport, Investment Zone, Veteran, CA2700, and Lower NI.

- **Employees** > **Update** the relevant employee
- **Details > Tax**
- Set the **NI Category** as required
- Click **Update**


My tasks
Employee setup
Pay Item editor
My data feeds
Pay runs
My documents
My analytics
Toolshed
Company setup
Setup
My processes
Payroll Debbie
Import
My dashboards
Documentation
Foreign country:
Bank
Account name:
ROBINSON CRUSOE
Name of account holder
Payment method:
All
Banking report definition(s) for payment
Sort code:
000001
6 digits
Account number:
00000002
Bank/building society, 8 digits
Tax
Weekly hours worked:
Other
Other if occupational pension scheme
P45 tax code:
Only enter if P45 received
P45 week1 month1:
P45 leaving date:
dd/mm/yyyy
Use latest if more than one
P45 total pay to date:
Only enter if P45 received
P45 continue student loan:
No
Only enter if P45 received
P45 continue postgraduate loan:
No
Only enter if P45 received
NI category:
General
Apprentice
Form CA2700 (NICs another job)
Certificate of election (Female lower NI)
Exempt
Freeport-General
Freeport-Form CA2700 (NICs another job)
Freeport-Certificate of election (Female lower NI)
Veteran
Invest Zone-General
Invest Zone-Form CA2700 (NICs another job)
Invest Zone-Certificate of election (Female lower NI)
Director:
Director NI cumulative:
Paid irregularly:
Casual worker
Off payroll worker:
PSC worker
Tax (Employee-specified)
Date of birth:
01/08/1980
Gender:
Male
NI number:
RN000011C
From a payslip, P60 or HMRC letter
Select A, B or C using the HMRC Starter checklist
Student l
No
If plan type