Processing Opt-Outs

Pension and Automatic Enrolment (AE) · https://paiyroll.com/kb/processing-opt-outs/

Follow this guide to process opt-out instructions received from your pension provider.

Pay item editor

Search or select the employee.

Add the **Opt-out** date to the **AE** (Auto Enrollment) pay item. Ensure this day is after the enrolment date. If you enter a date before the enrolment date, it will be ignored, and the opt-out will not be in effect.

Normally, you would also enter the **Refund reference** from the pension provider (or any appropriate text string). If a refund is due, this will be automatically applied.

> Only in an exceptional case where you need to override the refund, simply **omit** the refund reference and this will instruct the software that a **no refund should be processed**.

Verify the Opt-out has worked by clicking **Update** and checking the mini payslip. Complete with a payrun **Redo**.

