Setup Holiday Pay Companion

Holiday pay · https://paiyroll.com/kb/setup-holiday-pay-companion/

Follow this guide to **set up** and **operate** the Holiday Pay Companion alongside your existing payroll software.

Setup

Follow this section to set everything up.

Prerequisites

In general, **works_ids** are required for all workers. This is to enable the upload of holiday history and also for day-day shift uploads.

Import

The fastest way to set up your company is to use the FPS Importer. As part of your onboarding, you will have received instructions for exporting the necessary files from your existing payroll software.

Import > HMRC FPS or **Quickstart Run** > Choose the 2 files.

Retain the defaults: Parallel run, No postponement, Banded earnings, and click **Import files**

In a few seconds, the import will be complete, and your company will be set up.

Upload History

See this article for uploading history.

Setup a Shift Data feed

See here for how to set up a Shift data feed to allow you to upload weekly Shifts.

Your company should now be correctly set up in paiyroll®.

Operation

Follow this section to operate the Holiday Pay companion for each pay run. This will require **holiday bookings** and all variable **shifts.**

Starters

You will need to upload new starters and set leaver dates as the pay runs proceed.

Holiday Bookings

You can choose to upload approved holiday bookings from a file or have the workers submit holiday requests, which are approved by managers.

Upload Shifts/Overtime

My data feeds > Upload your variable data

Pay Runs > Redo to redo the pay run and refresh all reports

Enter or Upload Holiday pay into your existing payroll

Documents > **Preapproval2 Summary**: See the **Holiday Accrual** tab for Daily, Weekly or Period holiday pay values to enter into your existing payroll.

Approve

Pay Runs > **Approve** the pay run when everything is done - this will update the holiday history in preparation for the next pay run.