Switching Pension Scheme

Setup paiyroll® · https://paiyroll.com/kb/switching-pension-scheme/

Follow this guide to change the default NEST scheme, after importing, to a different scheme.

Scheme Pay Definition

Edit the scheme Pay Definition:

- Company set up > Pay Definitions
- Search for the **NEST** scheme
- Update
- Change the Name and Description to a suitable name
- Select the new scheme
- Now complete all the other settings
- Update

All pay items that use the scheme pay definition will have their name automatically changed. You can see these in the Pay Item Editor

Report Definitions

Now, delete the NEST Report Definition and then add the new reports:

- Company set up > Report Definitions
- Search for NEST
- Delete any NEST Report definitions

Add your chosen pension provider report definitions:

- Add
- Select the Company
- Select the Pension Report
- Click Add

Repeat for any other related report definition. For example, pension providers generally have two reports one for contributions and another for member enrolments.

If you are choosing API pension reports, we recommend you also add the CSV versions as backup.