

Getting started

Password

Create a password and enter it again for confirmation. This is used for entry to the program and can be disabled once inside the program. It is separate from the company passwords you have already set up in Superpay.

Import Superpay 3 data

1 of 5 Select companies

Click *Import Data* to import your companies and employees from Superpay 3.

Type the location of your Superpay 3 data, or click *Browse* and select the folder. Select a tax year to search within (defaults to current tax year). Click *Display companies* to list all companies within that directory.

Select which companies are to be imported using the checkboxes on the left.

Select a date range to search within for starters and leavers. These are based upon the Start Date / Leave Date fields of the employee record in Superpay 3. For example, searching between 1/8/09 and 1/9/09 will find any employees who have a start or leave date between the 1/8/09 and 1/9/09. The default is the last 31 days from today - this can be changed in the options.

Once you have selected all the companies to be imported click *Import*.

2 of 5 Confirm import

Click *Confirm Import* to begin searching for employees within the selected companies. This may take a few minutes if the companies are large.

It will display the current progress on the import while it is importing. When it finishes the next step begins automatically.

3 of 5 Select forms

One screen is displayed for each company, listing all starters and leavers within the given period. By default it will select a Leaver P45 for anyone who leaves, a Starter P45 for anyone who has joined and has previous pay or tax figures in Superpay 3 and a P46 for anyone who has joined with no previous pay or tax figures. It is possible to change these defaults in the options. If you want to select a different form or multiple forms tick the appropriate boxes for each employee.

When you have selected all the starters and leavers for a company click *Confirm form choices* to save your selection. When the last company has been saved step 4 begins.

Step 4 of 5 Process data

Click *Process Data* to continue. This will create all of the forms requested.

Step 5 of 5 Import complete

Displays a list of how many companies were imported and how many forms were created. Click *Continue* to close the window.

Note that some forms will require additional input before they can be submitted. The Starter P45, P46 Expat and P46 Pension all have additional fields that are either not asked for in Superpay 3 or cannot be imported.

Main Window

The currently stored companies are listed in the top half while the forms for the selected company are displayed in the bottom half. The bar in the centre of the screen displays the currently selected company's Superpay number, name and PAYE reference.

Company list:

Each company is listed with their Superpay company number and PAYE reference as well as a count of how many forms have not been filed for that company.

Form list:

Lists each type of form under its own tab with some basic employee details and the current status of the form.

Right click on an individual form to complete or check the details of the selected form.

By default this screen will only show you companies and forms that have not been accepted live. It is possible to view all forms by changing from *Show co's with new forms* to *Show all companies* at the top.

Editing a form

The form type and save / cancel buttons are displayed at the top. Press cancel to discard all changes and close the window. Press save to save the form as it currently stands in the window.

The company and employee this form applies to are displayed immediately below this:

Company name (Company PAYE ref)

Employee Superpay 3 code : Employee name (Employee NI Number)

If you attempt to save while there are errors on the form then an error message will be displayed telling you of the errors found. It is possible to save the form anyway with certain validation errors, though the form is unlikely to be sent to HMRC successfully while these errors exist.

Setting up filing details

It is necessary to set up either your agent details or your company's details before you can file successfully. Click Menu and enter the Options to set these up.

For a company with no agent

Select the Company Gateway Setup tab.

Select the company to update from the list.

Change Agent Settings to "Do not file as agent".

Complete the Government Gateway details for this company at the bottom and click Save Changes.

Setting up an agent

Select the Agent Setup tab.

Enter the agent's details and click Save Agent. To create multiple agents click Create New Agent, fill in the details and save for each agent.

One agent will be the Default Agent, which will be selected by default for companies. If you wish to use multiple agents you can manually select which agent a company will file with on an individual basis. The first agent you create will be assigned as the default agent. This can be changed on the agent setup screen by ticking the Default Agent box on the agent you wish to change to the default.

For a company filing with the default agent

This is the default and requires no further setup.

For a company filing with a non-default agent

Select the Company Gateway Setup tab.

Select the company to change from the list.

Select File with an agent.

Select the agent this company will file with from the dropdown box.

Click Save Changes to save this selection.

Filing

On the main screen click on Send Forms to begin the filing process.

Step 1 of 4 Select companies

All companies with unfiled forms will be listed. Select which companies are to be filed. At the bottom you can choose which tax year you are filing for as well as whether to file as live or test data.

Click Continue to continue.

At this stage the filing details of each selected companies are checked to see that they have been completed. This will either check the company's details or their agent's details, depending on how you have set up the company. The program is unable to check that the details are correct, merely that something has been entered. It is possible to pass this check with an invalid Gateway ID / password and then get a failure to authenticate with the Gateway.

Any company that has incomplete details will be reported in a new window. It is not possible to continue with the filing process while companies with errors are selected. Either close the filing window and correct the errors or deselect those companies with errors to continue.

Step 2 of 4 Select forms to file online

A list of all selected companies and a count of each type of form they have to file is displayed. It is not possible to select forms to an individual level but you can select what type of forms will be filed for each company. By default all unfiled forms will be selected. Click Continue to continue.

Step 3 of 4 Begin filing

A list of how many companies and a total of how many of each form are to be filed is displayed. The window indicates whether these are to be sent as test or live data. Click Send Forms to send these to HMRC.

While sending a message will be displayed. When all forms have been sent it will continue to the next step.

Step 4 of 4 Complete

Click Finish to close the window.

Checking responses

The program will automatically query responses for relevant messages when it opens, but otherwise there is no automatic query. A manual query can be done by going to Menu and Check responses.

You select a tax year to query and click Begin Query to check. If there are no messages to query it will say "No outstanding filing messages to query.", otherwise it will tell you it is querying. When it finishes click Close to return to the main window. The status of all messages queried will be updated.

Once a message has been accepted live it will no longer display in the company list when showing unfiled companies.

Frequently Asked Questions

1. When I attempt to import my company it is not displayed in the directory.

Make sure that you have selected the correct directory to view. You can find this directory by entering the company in Superpay and pressing Alt + F10 on the main menu to display the System Information. The line that begins Data: will tell you where this company is located, e.g. J:\Superpay.

If somebody is currently using a company in Superpay 3 then it is not possible to import it. The program will not list that company for importing as it is not valid. If you are on a network make sure that nobody else is currently working in this company. Once the company is no longer in use click Display again to refresh the list.

2. When I import a company it is not displaying an employee who has started / left.

The program will only find employees based on their entered Start Date or Leave Date in Superpay 3. It will not check based on the date an employee was created nor does it check if a record has been deleted or not. If these have not been entered then the import will not display the employee.

Check that you are searching within the correct date range. On the first screen of the import where you display the company list there are a pair of dates indicating what the program will search for. By default these will only display employees from the last 31 days. There is also an option to select whether to search for starters only or leavers only. If this has been inadvertently changed the program will not find all starters and leavers.

It will not attempt to import someone who has already been imported by default. If it finds a form already exists for that employee it won't create a new form of the same type. This can be changed within the options menu.

3. I have entered a starter's previous employment details in Superpay 3 but these are not being imported to the filing program.

The only previous employment details that can be imported are the totals to date figures. The leaving tax code, leave date and last pay period cannot be imported due to limitations of the Superpay 3 data storage system.

This has a side effect that an employee who has brought a P45 but was not on a cumulative tax code will, by default, be flagged as a P46 during the import process since it is not possible to determine if they have any previous employment details.

4. A new starter joined the company with a P45 but the program has imported them as a P46. How do I change them to a P45?

It is not possible to change the P46 to a Starter P45. You have to delete the P46 by selecting it in the list, right clicking on it to bring the menu up and choosing delete. Import the employee again and select a Starter P45 instead of the P46 on Step 3 of the import process.

5. My submissions are being rejected with a failure to authenticate error. I have checked the ID and password and they are still rejected.

This error is only caused by either the Gateway ID or Password in use being incorrect or by the company's own PAYE reference being incorrect.

Common mistakes include accidental capitalisation of letters, replacing the number 0 with the letter O (and vice versa) and including additional spaces at the end of the ID or password.

If all of your companies receive this error:

If the company is filed by an agent make sure that the agent's Gateway authentication details are correct on the Agent Setup tab of the options screen. Check that the company is set to file with the correct agent on the Company Gateway Setup tab. You should not fill in your agent authentication on this tab.

If the company is not filed by an agent make sure that the company's own authentication details are correct on the Company Gateway Setup tab of the options screen. This should be set to file with no agent and have the company's details filled in.

If only one or two companies receive this error:

If other companies can file successfully it is most likely that the company's PAYE reference is incorrect. This cannot be edited in the filing program itself; you must change it in Superpay and then re-import the company with the new reference. It is not necessary to import the employee's again as they will use the new company reference.

Instructions

Printing the employee's copy of a Leaver P45

Leaver P45s can either be printed from Superpay as normal onto HMRC stationary or as a plain paper form within the filing program. These plain paper forms print onto blank A4 sheets and copy the appearance of the HMRC P45. This design is approved by HMRC and can be substituted for a copy printed on their stationary freely.

Within the filing program they can be printed on an individual level by viewing the form on screen and pressing print or by right clicking the form in the list and selecting print from the menu.

A batch of forms for a company can be printed by right clicking on a company and selecting Print Leaver P45s. This will allow you to search for forms within a certain date range and print them as one print job. You can either search for all leavers who have left within a given range of dates or search for all Leaver P45s filed within a given range.