



Delivering practical payroll training  
nationwide for 28 years

Course  
Prices  
FROZEN  
for 2013

## Payroll Alliance Training Courses Spring 2013

We provide practical and comprehensive training courses,  
delivered by industry experts, who ensure you are 100% proficient.

# Introduction by Linda Pullan

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# Introduction by Linda Pullan



Hello and welcome to Payroll Alliance's new training course brochure for spring 2013. Payroll Alliance has been providing training to the payroll industry for over 28 years. We pride ourselves on providing a wide range of courses, which are topical, informative and highly practical. Our courses are delivered by trainers who are industry specialists with many years of practical experience.

**£25 discount on any spring one day course booked by 11 January 2013 (see booking conditions)**

**There is an early bird discount of £25 off any spring one day course booked by 11 January 2013 (\*excluding special student and registered charity prices).**

## CPD Hours

With payroll legislation continually changing it is important to keep up to date. This is why we are corporate affiliates of the CPD Institute and our Attendance Certificates confirm the number of CPD hours attained for each course (this excludes the Foundation E exam).

## Payroll Management Courses

Last year we introduced some new courses to help you plan for the future. These will also provide payroll managers and senior staff with specific courses. The Payroll Management Update provides payroll managers with a programme that focuses on forthcoming changes which will have a huge impact on the payroll department.

## Real Time Information

Last spring, we introduced a new one day course to help you prepare for Real Time Information. This course has proved very popular so we are rolling this course out again this year. We are also introducing two new half day workshops. One is aimed at payroll bureaux and agents to help them address their specific issues surrounding RTI for client payrolls and the second workshop focuses on data cleansing and how employers can prepare for Real Time Information. Many of our course programmes have been updated to reflect employer's obligations under Real Time Information.

The Payroll Perspective on Auto Enrolment course will help prepare you for the forthcoming changes in pensions due to begin in 2013. We have also introduced a one day course on RTI and Auto Enrolment which provides employers with a good overview on all the key issues on these two important changes which will affect all employers.

The Spring Payroll Update 2013 is a new one day course which tackles some of the thorny issues that payroll professionals face each day and includes practical advice on data cleansing, a critical part of your preparation for Real Time Information.

We also offer four courses for dealing with overseas employees; Introduction to Payroll for Global Employees and Advanced Payroll for Global Employees, and if you are dealing with Irish payrolls then we can offer the Introduction and Advanced Irish Payroll.

Our venues are easily accessible and all located in city centres. You will find a list of venues on page 4. All our courses come with a comprehensive set of notes. We are committed to providing good quality training to ensure that payroll professionals work at maximum efficiency whilst keeping employer's liabilities to a minimum.

## Registered Charities

We also feel it is important to support registered charities so we offer a special low price for attending our courses of £299 plus VAT for a one day course but this excludes all other discounts and special offers.

## Students

For those of you currently studying one of our distance learning qualifications, there are a number of courses in this brochure which are offered at a special price of \*£299 plus VAT to students actively studying with us, as the courses would be beneficial to their studies.

Students studying our short online courses; the Payroll Technician's Award can attend the Advanced Payroll course and those studying the Award in PAYE and NIC Calculations can attend the Payroll for Beginners only for the special student price (the other courses are not relevant to their studies). The classroom courses are not compulsory for students.

## In House courses

All of our courses can be run on an in house basis and programmes can be tailored to your specific needs, usually at no extra charge. For further details or to discuss your requirements please call 020 8401 1828/9.

Linda Pullan, Head of Payroll Alliance  
2008 Winner of the Strathearn Award for Lifetime Achievement in Payroll

# Definition of Course Levels

The ratings are an easy way to find the right course for you. Our courses are rated from 1 (entry-level) to 4 (advanced). In the case of the intermediate and advanced courses, the ratings show you what levels of knowledge we assume you already have. We also present update courses aimed at everyone working in payroll. A brief guide follows, but do call us if you have questions about choosing the right course.

## Level 1

Suitable for those with little or no knowledge of payroll.

## Level 2

Suitable for those with some basic knowledge of payroll, which may have been obtained through working in a payroll environment or via a Payroll for Beginners course.

## Level 3

Suitable for those who have worked in payroll for some time, are familiar with the core procedures and concepts, and want to develop or update their technical knowledge.

## Level 4

Suitable for team leaders, supervisors and managers who require training on technical, legal and procedural issues. Level 4 also covers specialist courses and new regulations and procedures.

## Management courses

Suitable for managers, supervisors and those responsible for the payroll, who need more in depth training on management issues, technical problems and new regulations.

## Essentials

These courses are aimed at everyone in payroll, regardless of experience and are mostly courses that provide an update on procedures and regulations.

## Venues

These are our preferred venues in each location. However, on occasions it may be necessary to substitute hotels for operational reasons. Please check your joining instructions, which will be emailed to you normally two weeks prior to the course taking place.

- Birmingham: The Hyatt Hotel & Crowne Plaza
- Bristol: The Grand
- Edinburgh: The Apex, Waterloo Place
- Glasgow: Thistle Glasgow
- Leeds: The Leeds Marriott
- London: Holiday Inn Bloomsbury
- Manchester: Double Tree Hilton (formerly the Mint Hotel)
- Reading: Novotel
- Southampton: Novotel

## Course Timings:

**Full Day:** Registration from 8.45 a.m. Course starts at 9.30 a.m. and concludes at 4.30 p.m.

**Half Day:** Morning registration from 8.45 a.m. Course starts at 9.30 a.m. and concludes at 12.30 p.m.  
Afternoon registration from 1.15 p.m. Course starts at 1.30 p.m. and concludes at 4.30 p.m.

## Booking Procedures

### How to Book

Please see p38 booking details and our booking form. Alternatively visit [www.payroll.com](http://www.payroll.com) to book online.

# Speaker Profiles



## Linda Pullan

Linda Pullan is Head of Payroll Alliance and has many years of payroll experience as a 'hands on' Payroll & Expenses Manager for the Daily Telegraph before moving into payroll training. She spent ten years as the Education Manager for Payroll Alliance before joining Payroll World as head of training and technical editor, writing and presenting a wide range of courses. Linda rejoined Payroll Alliance in January 2006. She has been designing payroll examinations for the last 18 years. Linda is a member of a number of Employer Consultation Panels and Committees and is also a regular speaker at user group conferences around the country and holds the Diploma in Payroll Management. In November 2008, she won the prestigious Strathearn Award for Lifetime Achievement in Payroll. Linda was voted one of the top 50 most influential people in payroll by Payroll World readers for 2009, 2010 and 2011. She is also a member of the judging panel of the Pay and Benefits Awards and a regular contributor to the Pay and Benefits Magazine.



## Brad Chick

Senior Trainer Brad Chick joined us from consulting firm Logica where he was a legislation consultant and ran internal payroll training courses. He brings a tremendous depth of experience having worked in payroll for over 30 years: five for the Inland Revenue and 13 running client payrolls for a firm of chartered accountants. Brad is the first UK citizen to gain the Irish Payroll qualification. He holds the Diploma in Payroll Management.



## Paul Jackson

Paul has over 30 years of payroll experience. He has been involved in training and presenting courses for over 25 years and has extensive knowledge of payroll software and technology. Paul has implemented computer systems for a wide range of organisations in both private and public sectors.



## Marcia Bowen

Marcia is usually found operating the Payroll Alliance Technical Helpdesk where she answers technically complex and urgent questions but she also finds time to tutor students studying Payroll Alliance qualifications. She also presents a number of Payroll Alliance courses including the Payroll for Beginners courses. In addition, Marcia is an editor of the Payroll Alliance monthly RTI e newsletter. Having worked in payroll for over 20 years, her knowledge extends to running and managing payrolls in the private sector, mainly for professional and manufacturing companies where she has been instrumental in setting up integrated computerised P11D systems for various companies. One of Marcia's earlier roles involved providing in house training workshops for managers in PAYE and benefits in kind.



## Mike Evans

Mike is an Employment Taxes and CIS Consultant, a former Senior Inspector of Taxes with over 40 years experience of dealing with payroll (PAYE/NIC/P11D/PSA/Expatriate) issues and the construction industry. Mike spent the first 20 years of his career in the Inland Revenue (now HMRC) before moving to the profession, where he worked for three second tier firms over 18 years. He has been an external trainer for Payroll Alliance for the last 18 years, presenting courses on P11D expenses and benefits, payroll (PAYE/NIC aspects), flexible benefits, the Introduction and Advanced Payroll for Global Employees.



## David Keffler FCA FCCA

Having qualified as a Chartered Accountant, David went on to manage the accounting, payroll & pension departments of a £180m company. He now runs his own practice which provides financial project management advice to clients by assisting them in the process of selecting & implementing financial systems. David presents the 'How to Manage a Project and Introduction to Finance courses'.



## Ian Brennan

Ian has extensive payroll knowledge having spent 30 years in the payroll industry in a various roles. He is currently Payroll Products Manager at Ceridian and is responsible for statutory compliance and development of front-end payroll systems in the UK. Ian holds the MSc in Payroll Management.

## Course Fees

Our course fees include tuition by an experienced trainer, a comprehensive set of course notes, forms, tables & exercises relevant for the course subjects. Refreshments are provided throughout the day.

Lunch is provided on all one day or multi day courses. An attendance certificate is issued to each delegate at the end of the course.

**Payroll Alliance is a corporate affiliate of the CPD Institute and we offer CPD hours for all our events and training courses with the exception of the Foundation BTEC exam.**

# Payroll for Beginners

This is an ideal course for those who have just joined the payroll team or whose work brings them into close contact with the payroll department. For example they may be based in HR or the Finance department.

Practical exercises are provided throughout the day to ensure that those attending the course have fully understood the essential payroll skills.

The Payroll for Beginners course programme is particularly relevant to students studying the online qualification for the Professional Award in PAYE and NIC Calculations (BTEC level 2) who would like some classroom tuition to help them with their studies. This course is also offered to students studying the Certificate in Payroll Practice or Diploma in Payroll Supervision if they are new to payroll and would like to attend a classroom course.

Attendance is optional and is offered at the special student price of £299 plus VAT.

Once attendees have grasped the fundamentals of payroll processes the next step would be to attend the Payroll Foundation courses.

## Course Programme

- Build up to gross pay
- Pre tax and post tax deductions
- National Insurance numbers & why they are important
- Elements of pay that attract National Insurance (NI)
- What is the LEL, PT, ST, UAP and UEL and why they are important
- Calculating NI using table & percentage method
- Why employees pay different rates of NI
- Pay As You Earn (PAYE) income tax
- How the cumulative tax system works
- Tax rates & tax bands including the 50% additional tax rate
- How the Taxable Pay tables and tax codes work
- Calculating items of pay that are taxable
- Identifying items of pay that are not taxable new bullet point
- Real Time Information

Practical exercises are provided throughout the day.

"The training day was excellent. Very thorough and informative. Very helpful for manual calculations. Thank you very much Marcia, excellent day."

Claire McCallion, General Dynamics UK Ltd

### Duration

One day

### Venues & Dates

Birmingham:	19 February
Bristol:	16 April
Glasgow:	23 May
London:	16 January
	22 May
	11 July
Reading:	12 June

### Fee to attend the course:

Member's fee: £378.25 + VAT

Non member's fee: £445 + VAT

Registered charities fee: £299 + VAT

\* Student's fee: £299 + VAT

\* Please quote student number when booking a place (only applies to students actively studying with Payroll Alliance).

### BTEC Level 2 Qualification

#### Fee for qualification and classroom course:

Fee for online qualification and optional classroom course:

*Online qualification:*

Member's fee £449.10 + VAT

Non member's fee £499 + VAT

*Optional attendance of Payroll for Beginners course for the additional Student price £299 + VAT*

6 hours



# Foundation in Tax, NI, Starters & Leavers (Payroll Foundation A & B)

This popular and highly focused two-day programme is ideally suited for inexperienced payroll staff who have some knowledge of payroll or have attended the 'Payroll for Beginners' course. It is also suitable for those who have some payroll experience but require further training in order to have complete confidence in their ability to not only manually calculate tax, National Insurance, new starters and leavers but also to deal with employees' pay related queries. The programme includes the implications of Real Time Information, in particular in the processing of starters and leavers.

The Foundation week is a classroom based qualification which for those who successfully pass the 3 exam papers on day 5 leads to a BTEC level 4 qualification – The Award in Payroll Administration.

## Course Programme

### Day One

- Build up to gross pay
- Pre tax additions & deductions
- Post tax additions & deductions & which deductions take priority
- Gross to net calculations – which figure is used to calculate tax & NI
- The tax year & how it works
- How pension contributions affect NI
- NI calculations – using table & percentage method
- Standard rates of NI – categories A & D – how do you decide which category to deduct particularly as category F has been abolished?
- How the cumulative tax system works
- Current tax rates & tax bands including the 50% additional tax rate
- Personal allowances for tax purposes – understanding the rules including the restriction on allowances
- How to use the pay adjustments tables in conjunction with the operation of tax codes
- How to manually calculate tax using the tax tables
- Implication of reporting RTI data such as tax and NIC

### Day Two

- Calculating tax on a non cumulative basis
- K tax codes – why are employees on K tax codes & how to manually calculate tax using a K tax code
- What attracts NI?
- Reduced rate NI & Age Exemptions – what are the rules? – How to check that the certificates are valid & how to make the calculations. The changes to women's State Pensionable Age.
- Processing new starters onto the payroll including casuals and the implications of RTI
- Processing & checking the P45 for a new starter
- Dealing with forms P6, P9, P7X & P9X
- Processing form P46 for new starters without a P45
- How to process leavers correctly including reporting leavers under RTI
- How to calculate final pay
- Payments after leaving
- Issuing form P45 to leavers – the perils & pitfalls

Practical exercises are provided throughout the two-day course.

### Duration

Two days

### Venues & Dates

Birmingham:	17-18 June
Bristol:	18-19 February
Edinburgh:	15-16 April
Leeds:	13-14 May
London:	11-12 March
	3-4 June
	12-13 August

### Fee to attend the course:

Member's fee: £641.75 + VAT

Non member's fee: £755 + VAT

Why not book the complete Foundation Course and gain a BTEC / Edexcel Level 4 Qualification

**PLUS SAVE 10%**

"All was fantastic! Great and refreshing."

Sophie Monks, Boston Borough Council

12 hours



# Foundation in Statutory, Maternity, Paternity, Adoption & Sick Pay (Payroll Foundation C)

This practical course provides a full and comprehensive guide to the calculation and administration of the statutory payments of Maternity, Paternity, Adoption, Sick Pay and leave.

It will ensure that those attending will be competent to administer these schemes and be fully aware of who is eligible, the exclusions, how to manually calculate the payments, recover the correct amount from the HMRC and keep necessary records as required by legislation.

The course will include the entitlement to Additional Statutory Paternity Pay and Leave and the effects of Real Time Information (RTI) on periods of maternity, paternity, adoption and sick leave.

## Course Programme

### Statutory Maternity Pay (SMP)

- The terms used for SMP
- Who qualifies and who is excluded?
- Notification rules for payment & leave
- Calculating the average earnings & payment
- How pay increases can affect SMP
- Bringing the maternity leave forward
- The maternity pay period & maternity leaver
- How to use the SMP tables
- The payment & recovery rates of SMP & year end reporting
- Form SMP1
- Maternity leave & the restriction on KIT days and the consequences of exceeding the limit
- Provision of non pay benefits during maternity leave
- Maternity leave and RTI - irregular payment indicator

### Statutory Paternity Pay (OSPP & ASPP) & Statutory Adoption Pay (SAP)

- The terms used
- Who qualifies & who is excluded
- Notification rules for payment & leave
- How to calculate and make the payment
- KIT days and their restrictions for employees on adoption leave
- Forms SC3, SC4, SPP1 & SAP1
- Payment & recovery rates & year end reporting
- Additional Statutory Paternity Pay (ASPP) and Leave
- Paternity and adoption leave and RTI - irregular payment indicator

### Statutory Sick Pay (SSP)

- Basic terms
- Who qualifies and who is excluded?
- Medical certificates
- Evidence of incapacity & linking sickness
- Qualifying days & PIWs
- Calculating the average earnings & entitlement
- Form SSP1 and Employment Support Allowance (ESA)
- Long term sick leave and RTI - irregular payment indicator
- Recovering SSP from HMRC & year-end reporting

Practical exercises are provided.

### Duration

One day

### Venues & Dates

Birmingham:	19 June
Bristol:	20 February
Edinburgh:	17 April
Leeds:	15 May
London:	13 March
	5 June
	14 August

### Fee to attend the course:

Member's fee: £378.25 + VAT

Non member's fee: £445 + VAT

Why not book the complete Foundation Course and gain a BTEC / Edexcel Level 4 Qualification

**PLUS SAVE 10%**

"I found everything in today's course of great interest. I feel more confident in dealing with statutory payments."

Samantha Walker, Northern Rail

6 hours





# Foundation in Payroll Legalities & Practicalities (Payroll Foundation D)

This one day course is ideal for the more experienced payroll professional because it provides details of the complexities of key payroll legislation and practices including the implications of Real Time Information (RTI). It is also suitable for candidates with more experience of payroll who need to enhance their understanding of more complex issues and to be able to put them into practice using various scenarios. Although many payroll systems will now deal with all the key payroll calculations, payroll staff still need to understand the implications of these routines and how to correctly calculate a manual payment when things go wrong. Unless you know how the calculations are made it is difficult to spot and adjust errors.

## Course Programme

- How to calculate various elements of pay including overtime, back pay, holiday pay and contractual & legislative entitlements
- Student loan deductions – how to calculate the deduction using table & percentage methods
- Employing students – UK & overseas both during and outside the vacations and the important changes which will affect all employers for 2013.
- What is a lawful and an unlawful deduction & the consequences of getting it wrong including recovery of overpayments
- Statutory holiday entitlement
- Legislation – practical ways of meeting complex legislative requirements
- A basic practical guide to court orders and Child Support Orders (DEOs) including changes to Maintenance Orders
- Brief overview of year end and the importance of record keeping for year end reporting and key deadlines during the tax year and how RTI will affect these procedures
- The key points and pitfalls of how to make a manual payment of salary, extra payments and payments after leaving and reporting the manual payment under RTI
- Practical exercises on calculating manual payment

### Duration

One day

### Venues & Dates

Birmingham:	20 June
Bristol:	21 February
Edinburgh:	18 April
Leeds:	16 May
London:	14 March
	6 June
	15 August

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT

Why not book the complete Foundation Course and gain a BTEC / Edexcel Level 4 Qualification

**PLUS SAVE 10%**

What areas were of most benefit? "The revision exercises. Fabulous course!"  
Sophie Monks,  
Boston Borough Council

6 hours  
CPD  
Institute  
Corporate Affiliate



# BTEC Examination for the Professional Award in Payroll Administration (Payroll Foundation E)

The examinations not only test delegates' knowledge but their understanding of the key payroll procedures that are covered in one or more parts of the Payroll Foundation courses A, B, C and D. Successful completion of all three parts of the examination will lead to the Award in Professional Payroll Administration BTEC Edexcel qualification – Level 4.

The Payroll Alliance Foundation courses and short course qualifications are modular and designed to meet the different requirements of delegates.

All our qualifications are **accredited by BTEC** through our provider **Edexcel** and are nationally recognised and externally verified. The Professional Award in Payroll Administration is accredited at Level 4.

Delegates who do not achieve a pass in all three parts of the examination still qualify for a BTEC certificate acknowledging the papers they have passed. If they re-sit the papers in which they did not receive a pass, within a year of the original exam, they can qualify for the full award. Re-sit fees are £80 per paper plus VAT.

Delegates who achieve a pass on all three papers qualify for an exemption from module 1 of the Certificate in Payroll Practice, of the Professional Diploma in Payroll Supervision and also Assignment 1 of module 1 of the Advanced Diploma in Payroll Management.

Course fees for our distance learning courses include access to the Payroll Alliance Online Academy for Payroll qualifications and student workshops.

Alternatively, delegates who achieve the Award in Payroll Administration can further their studies with a short six week online course which leads to a Payroll Technician's Award (BTEC level 4) upon successful completion of an exam. Students studying the Payroll Technician's qualification can attend an optional classroom course "Advanced Payroll" for the special student price of £299 plus VAT. For further details please visit our website [www.payrollalliance.com](http://www.payrollalliance.com)

## Duration

Half day (a.m.)

## Venues & Dates

Birmingham:	21 June
Bristol:	22 February
Edinburgh:	19 April
Leeds:	17 May
London:	15 March
	7 June
	16 August

## Re-sit fee to attend the course:

*Re-sit fees £80 per paper plus VAT*

Why not book the complete Foundation Course and gain a BTEC / Edexcel Level 4 Qualification

**PLUS SAVE 10%**



# Payroll Foundation Course Package – BTEC Edexcel Level 4

Start the year with a boost for your career – gain an Edexcel/BTEC qualification in payroll.

- Enhance your payroll skills of best practice within the payroll profession
- Enhance your career development prospects
- Enhance your understanding of more complex issues
- Increase your confidence and raise your level of expertise

## Course Programme

### Day 1:

Foundation A in Tax NI Starters & Leavers (Additions, Deductions, The Tax Year, Standard Rates of NI, Tax Rates & Tax Bands, Calculating Tax with Tables)

### Day 2:

Foundation B (Non cumulative tax, K Tax Codes, Reduced Rate, NI & Age Exemptions, Processing & Checking the P45, Dealing with Forms)

### Day 3:

Foundation C (Statutory Maternity, Paternity, Adoption & Sick Pay,)

### Day 4:

Foundation D (Legalities & Practicalities) – including court orders and CSA DEOs

### Day 5 (a.m.):

Examination (Edexcel BTEC Qualification – Level 4)

However, delegates who want to achieve the Award in Professional Payroll Administration need to attend the full Foundation course (A to E) although this does not need to be done on consecutive days. Delegates can attend part of the week and then complete the rest of the course and exam at a later date, if desired.

Book all four parts of the Payroll Foundation (A, B, C, D) and the exam for the Award in Professional Payroll Administration and save 10% on the combined course fee.

Delegates who achieve a pass on all three papers qualify for an exemption from module 1 of the Certificate in Payroll Practice, of the Professional Diploma in Payroll Supervision and also Assignment 1 of module 1 of the Advanced Diploma in Payroll Management.

Fees for our distance learning courses include access to the Payroll Alliance Online Academy for Payroll Qualifications and student workshops. For further details please visit our website: [www.payrollalliance.com](http://www.payrollalliance.com).

Alternatively, students can further their studies by taking the Payroll Technician's Award which is a six week online course with an exam at the end.

### Duration

1 week

### Venues & Dates

Birmingham:	17-21 June
Bristol:	18-22 February
Edinburgh:	15-19 April
Leeds:	13-17 May
London:	11-15 March
	3-7 June
	12-16 August

### Fee to attend the course:

Member's fee: £1486.65 + VAT

Non member's fee: £1749.00 + VAT

### IN-HOUSE TRAINING

Four or more delegates?  
Why not consider a cost effective training course at your office. All of our courses are available on an in-house basis.

24 hours



# Payroll Refresher

Payroll legislation and payroll procedures constantly evolve. This course has been designed to assist those payroll professionals who have either taken a career break or who have been away from the payroll industry for a while and now require a gentle reminder of the workings of the payroll environment and the implications of Real Time Information on day to day processes and procedures.

The course would also benefit accountants, HR personnel, IT staff and other professionals who need to refresh their understanding of current payroll legislation and regulations. However, if they just need an overview of payroll then the Payroll Briefing course may be more suited to their needs.

## Course Programme

- Lawful deductions
- How to calculate National Insurance Contributions : using LEL, UAP and UEL
- How to calculate PAYE (tax) using the different tax bands and tax codes
- Real Time Information
- Statutory Payments – an overview
  - SMP, OSPP, ASPP, SAP, SSP and the implications of RTI on long term leave
- In-Year filing – Forms P45, P46, P46(PEN)
- Overview of Auto enrolment
  - Pension schemes
- Salary Sacrifice Schemes
  - Childcare vouchers
- Student Loans – start and stop notices
- Tax Year End reporting requirements and deadlines

### Duration

One day

### Venues & Dates

Birmingham:	24 April
Leeds:	18 April
London:	20 March
	24 May
	4 July

### Fee to attend the course:

Member's fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

6 hours



# A Practical Guide to Salary Sacrifice

Salary sacrifice is familiar to most employers. However, the provision of non cash benefits for up to one year's maternity leave and new rules governing childcare vouchers means that more detailed knowledge of the scheme is needed to ensure the financial planning is correct. In the current economic climate employers are looking to Salary Sacrifice as a means of providing enhancements to an employee's package without increasing payroll costs.

When this is matched with benefits that have tax and National Insurance relief there are possible cost savings for an employer. When considering new benefits there are complex conditions that have to be met in order to take advantage of the tax and National Insurance reliefs and make the scheme financially viable.

Whilst operating schemes through third party suppliers is convenient, the employer may not realise the full extent of the liabilities that they have signed up to in changing the contract of employment.

If you need to know more about how to avoid the problems and pitfalls of dealing with Salary Sacrifice, then this is the ideal course for you. Research and planning is essential as HMRC will only approve a scheme once it is set up.

We also offer a new half day workshop Salary Sacrifice Schemes – Do's and Don'ts for those who are familiar with salary sacrifice schemes but need answers to some of the issues. Please see Half Day section of this brochure for details.

## Course Programme

### Salary Sacrifice

- Financial Planning – the latest VAT ruling
- Definition of Salary Sacrifice
- Change in contract of employment
- "Gross Pay" and "Reference Pay"
- Revenue Statement of Practice
- Lower Earnings Limit and National Minimum Wage – the effect on eligibility
- Extension to the provision of non cash benefits & maternity leave
- Interaction with other "deductions"
- Advantages for employer
- Employee communication

### Childcare

- The restrictions on PAYE and NIC reliefs from 2011
- Nursery places
- Third Party Schemes
- Vouchers
- Interaction with OMP
- The implications of providing benefits during maternity leave
- Paying more than the exempt amount
- Are refunds allowed?

### Pension

- Standard Provision – tax relief, no NI relief
- Effect of Salary Sacrifice
- How this works with auto enrolment
- Advantages for employee and employer

### Cycle to Work

- Lifestyle changes
- Employee choice
- New guidance on eligible employees
- New guidance on the valuation of cycles

### Other Tax Exempt Benefits

- Annual bus tickets
- Car parking
- Employment related training

### Company Car Schemes

- The financial model explained
- The combination of tax advantages
- Savings for both employer and employee

### Benefits

- Employee communication
- P11Ds
- Tax and NI treatment of benefits

### Implementing a new scheme

### Duration

One day

### Venues & Dates

Birmingham: 5 March  
19 June  
Leeds: 17 April  
London: 19 March

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

## IN-HOUSE TRAINING

Four or more delegates?  
Why not consider a cost effective training course at your office. All of our courses are available on an in-house basis.

"The whole day has given me much to think about."

Peter Parkes, Sandwell MBC

6 hours



Corporate Affiliate

# Employment Law for Payroll

This course focuses on key areas of employment law that affect payroll. It provides an insight into many diverse areas, including lawful and unlawful deductions from pay, which is currently the biggest source of complaint to Employment Tribunals and the recovery of overpayments of salary.

- Do you know what the latest ruling is on accruing holiday pay during sick leave?
- Do employees have the right to carry over untaken leave?
- Are you fully conversant with the rules regarding prevention of illegal workers?
- Do you know how to calculate arrears for National Minimum Wage under the new rules?

Attendance of this course will answer these and many more questions resulting from the minefield of employment law which a payroll professional is now expected to know.

As an employer, you cannot afford to get things wrong!

## Duration

One day

## Venues & Dates

London:	6 March
	13 June
Manchester:	24 April

## Fee to attend the course:

Member's fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

## Course Programme

- Employment status – who is an employee & who is self-employed?
- What are the consequences of getting it wrong?
- TUPE – what are the payroll implications regarding deductions & administration of court orders?
- How does TUPE 2006 differ from 1981 regulations?
- Contracts of employment – how to vary terms including pay
- Entitlements – holiday pay & other payments
- Statutory paid leave are you paying the correct amount? How to avoid the pitfalls
- Deductions – what is lawful & unlawful?
- Recovery of an overpayment of salary – is it legal? What are the rules?
- Termination of employment – redundancy & dismissal
- Data Protection – the eight principles and the records to be kept
- Absence due to ill health – the legal position
- Maternity rights – the rights & wrongs and how statutory paid leave affects maternity leave
- The consequences of taking too many KIT days during maternity and adoption leave
- Extension to the provision of non pay benefits during maternity leave
- The latest news on holiday accrual during sick leave
- National Minimum Wage
  - Changes to age bands and rates
  - What counts towards NMW?
  - Calculating arrears
  - Penalties
- Agency workers rights
- Prevention of illegal workers under the Asylum Immigration and Nationality Act 2006
  - How to carry out the correct pre-employment checks for potential new employees and employees transferred under TUPE
- Owner employee status

“Confirmation of many questions I had, especially on discrimination”

Martin Carey, Foster Wheeler Energy Ltd

6 hours



# Introduction to Finance

## – how to get Finance to work for you

This one day course explains your organisation's accounting function and how this can help payroll in your monthly balancing routines and raise your profile in the organisation.

### Is this course for you?

If you are involved with posting payroll information to the accounting ledgers, balancing the monthly payroll or require an introduction to your organisation's accounting function then this course is ideal.

It is not necessary for you to be fully conversant with Excel to attend this course.

### This course will enable you to:

- Reconcile your payroll data more efficiently using Excel, saving you valuable time and enhancing your understanding of financial data so you can make it work better for you.
- Ask the right questions and make more informed decisions.
- Contribute more to the business, thereby raising your profile
- Enhance existing systems

### The Benefits of attending this course

Worked examples that make the course fun and bring the issues to life, with all inclusive notes, which contain detailed screen images and explanations. You will receive a CD-ROM of all the examples & pro formas for you to use on your return to the office.

### Duration

One day

### Venues & Dates

Birmingham: 15 May  
London: 7 February

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

### IN-HOUSE TRAINING

Four or more delegates?  
Why not consider a cost effective training course at your office. All of our courses are available on an in-house basis.

## Course Programme

The operation of the main functions within a Finance Department, such as Financial Accounts.

- How double-entry book-keeping is used to create the essential elements of an accounting system
- How each of these is reconciled with each other and with the payroll department
- The creation & interpretation of the primary financial reports: profit & loss account, balance sheet and cash flow
- An explanation of ratio analysis and how to get the most from it, including such terms as staff turnover, return on staff employed and break-even analysis
- The business cycle, budgeting and decision-making, including terms such as Payback and Net Present Value (NPV). By understanding these terms your importance within your organisation will grow
- Financial controls, including controls to prevent the incorrect payment of employees

6 hours



# A Practical Introduction to Irish Payroll

The trainer, who holds a Diploma in Irish Payroll, will take delegates through the key payroll processes of calculating Irish PAYE, PRSI and USC. The aim of this practical course is to provide those attending with a thorough grounding of the key skills necessary to operate the payroll.

More and more companies, in particular payroll bureaux, are becoming involved with the operation of Irish payrolls. Although many of the terms used on Irish payrolls are the same or similar to UK payroll processes, there are a number of crucial differences.

Practical workshops, run on an In-house basis, are also available and can be tailored to your specific needs.

## Course Programme

- Course programme
- Irish payroll terminology
- The Tax Year & how it works
- Irish PAYE system
- Changes to the PAYE system introduced by Budget 2012
- The new cumulative basis for Universal Social Charge
- Tax credits – what are they & how are they calculated?
- Tax Credit notifications
- Variable Tax bands (Cut Off Points) & tax rates
- The differences between Emergency, Temporary and Week 1
- Taxation of illness benefit
- The Irish Social Insurance system
- Changes to the Social Insurance system introduced by Budget 2012
- How to determine the correct PRSI category
- Rates allowances & thresholds
- How to calculate PRSI
- New employees – how to set them up on the payroll
- Processing forms P45 & P46
- Leavers – processing the final payment
- Issuing the leavers forms
- Payments after leaving
- What elements must be shown on the payslip?
- Mandatory online filing

### Duration

One day

### Venues & Dates

Leeds: 11 June  
London: 5 March

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

*"A good foundation to Irish Payroll. Raised issues we should be aware of."*

Lorra Howarth, Payroll Manager, Speedyhire Plc

6 hours





# Introduction to Payroll for Global Employees – European Union

This practical course has been designed to gently lead payroll and HR staff into how they correctly deal with employees going to Europe or coming into the UK from Europe to work.

RTI will have a big impact on how remuneration packages for ex-pats are reported. This course is essential for anyone dealing with ex-pat or in-pat payrolls.

The course programme will address issues relating to the implications of tax, National Insurance and statutory payments.

It will also provide an understanding of when a P85 needs to be completed and whether or not the P46 (Expat) applies. We will also examine the new HMRC guidance for overseas employees known as the HMRC 6 which replaces the IR20 guide book.

The latest guidance from the Home Office regarding pre employment checks will be examined plus the requirements concerning work permits, visas and employing students who can only work restricted hours. RTI will have a big impact on how remuneration packages for ex-pats are reported. This course is essential for anyone dealing with ex-pat or in-pat payrolls.

## Course Programme

- Inward bound staff coming to work in the UK
- Outward bound staff leaving the UK to work abroad
- Residency rules – resident or non resident
- RTI implications for ex-pat and in-pat payrolls
- European workers coming into the UK and going to the EU
- Employer sponsorship and the new tier system for migrant workers
- Pre-employment checks – do you know the rules?
- Correct procedures for dealing with contract workers from abroad
- Work permits and visas
- Rules relating to non-resident employees paid by a UK employer and NI implications
- Form A1 (replaced Certificate E101 and E102)
- The rules relating to National Insurance and Social Security for EU members including reciprocal agreements
- Obtaining a NT tax code from HMRC
- Employing foreign students and restricted hours
- Entitlement to statutory payments – SSP, SMP, OSPP, ASPP and SAP
- Social charges of overseas authorities and the differing rules for EEA (EU) Members EEA, Reciprocal Agreement Countries

Practical exercises will be provided throughout the day.



Save £50 on the Advanced course when you attend the Introduction course as well

### Duration

One day

### Venues & Dates

Birmingham: 3 July  
Leeds: 30 April  
London: 11 April

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

### IN-HOUSE TRAINING

Four or more delegates?  
Why not consider a cost effective training course at your office. All of our courses are available on an in-house basis.

6 hours



Corporate Affiliate

# Advanced Payroll for Global Employees

HMRC's risk based approach to Employer Compliance is placing more focus on the income tax liabilities of directors and employees coming to work in the UK and on outward bound people where there may be a continuing requirement to deduct at least UK NICs. This can create problems for Payroll and HR personnel in dealing with these issues for overseas staff coming to the UK and for UK staff being sent abroad for varying periods of secondment or perhaps longer term relocations. RTI will have a big impact on how remuneration packages for ex-pats are reported. This course is essential for anyone dealing with ex-pat or in-pat payrolls worldwide.

These are important issues for a mobile workforce who relies heavily on Payroll and HR personnel to help them make a successful work move to a new country. A good understanding of the different rules in multiple jurisdictions is important and usually requires support from outside the business.

This course is designed to offer precisely that kind of assistance to Payroll and HR personnel.

The course will cover the more complex aspects of staff coming to work in the UK and being sent overseas to work, including the relevance of tax residence and domicile and when and how to complete relevant notification forms that HMRC will require from employees or their employers. The course will cover all the recent changes, as they affect Payroll and HR, and will explain the changes in HMRC guidance that have been brought about by changes in the legislation on residence and domicile.

## Course Programme

- Income tax rules, including recent changes on residence and domicile
- When and how to obtain an 'NT' tax code from HMRC
- The importance of where the duties are performed and when to operate PAYE
- The relevance and impact of the many 'Double Taxation Treaties' that the UK has negotiated with other countries
- Inward bound staff coming to work in the UK
- Outward bound staff leaving the UK to work abroad
- RTI implications for ex-pat and in-pat payrolls.
- The special rules on travel, subsistence and accommodation expenses
- Reporting benefits in kind
- Understanding the differences between relocations and secondments
- When to start or stop deducting Class 1 National Insurance contributions
- Reciprocal Agreement Countries, such as the USA and the 52 week rule for the rest of the world
- Modified tax equalisation and hypo tax
- End of year reporting for expats
- Share Options
- National Insurance for Homeworkers – how is NI determined?
- Maintaining Foreign Pension
- HMRC6 – which replaced the IR20
- Foreign Service Allowance
- Reporting Real Time Information (RTI)

### Duration

One day

### Venues & Dates

Birmingham: 28 February  
Leeds: 1 May

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

*"Whole course extremely enjoyable and interactive"*

Jane White, RES Ltd

6 hours



# Advanced Practical Guide to Irish Payroll

This course assumes a basic knowledge of the Irish PAYE and PRSI systems, as it looks at more advanced aspects of Irish payroll to explain the legislative basis and highlight the practical implications. As with the 'Introduction to Irish Payroll' course, emphasis is given to highlighting areas of difference between Irish and UK provisions. Examples of the calculations are given during the course and practical exercises will ensure that you understand how to apply the principles and the effects of the differences from UK legislation.

HR is not as well developed as in the UK and the payroll department is expected to be the source of information regarding employee rights and obligations. The course looks at the differences between Irish and UK employment law which may affect the day to day administration of an Irish payroll.

## Course Programme

- Calculation of Benefits in Kind (BIK)
- Proposed changes to Car Benefit
- Mandatory Payrolling of Benefits in Kind
- Processing Tax Year End
- Termination Payments – 3 levels of relief
- Attachment of Earnings Orders
- Employees entering and leaving the Republic
- Taxation of visitors to Ireland
- Work Permits
- National Minimum Wage
- Statutory Leave entitlements
- Tax and PRSI for Company Directors
- Payslips
- Treatment of share based remuneration

### Duration

One day

### Venues & Dates

London: 6 March

### Fee to attend the course:

Member's fee: £378.25 + VAT

Non member's fee: £445 + VAT

Registered charities: £299 + VAT

### IN-HOUSE TRAINING

Four or more delegates?  
Why not consider a cost effective training course at your office. All of our courses are available on an in-house basis.

6 hours



"All very useful"

Karen Whitlock-Patersons HR & Payroll Solutions Ltd

# Advanced Payroll

This practical one day course offers a wide and varied programme which will examine many of the complex areas of payroll processes and procedures that are often neglected. In particular the eight principles of Data Protection are often overlooked but at our peril!

This course is ideal for those who want to dig deeper into these issues to examine the practical implications, particularly suitable for team leaders and supervisors but not exclusively.

## Course Programme

- Employment Status
  - Who is an employee?
  - Consequences of getting it wrong
- Definition of Gross Pay
- Lawful Deductions & Overpayments
- Real Time Information
- Director's NIC & PAYE
- Court Orders – the more complex issues
  - Attachment of Earnings Orders
  - Deduction of Earnings Orders
  - Scottish Arrestments
- Salary Sacrifice
  - What is Salary Sacrifice?
  - Childcare vouchers
  - Pension contributions
- Annual leave entitlements
  - Holiday and sick leave
  - Holiday and maternity leave
- Data protection
  - The eight principles
- Termination Payments
  - PILONs
  - Redundancy Pay
  - Lump sum payments

Practical examples will be used throughout the day with exercises provided throughout the day.

### Duration

One day

### Venues & Dates

Birmingham: 6 March  
Leeds: 3 May

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

### Payroll Technician's Award:

**This new qualification is available to those who have attained the Award in Payroll Administration**

### Fee for qualification and classroom course:

Fee for online qualification and optional classroom course:

*Online qualification:*

Member's fee £449.10 + VAT

Non member's fee £499 + VAT

*Optional attendance of Advanced Payroll course for the additional Student price £299 + VAT*

### NEW

BTEC Level 4 Qualification

6 hours



# Run, Plan & Manage the Payroll Function

Effective payroll planning and adhering to departmental and company procedures play an essential role in the payroll department and ensure the payroll is processed efficiently and consistently to meet the legislative and contractual obligations.

Only 25% of UK companies have a contingency plan in place. Are you one of the 25%? Adverse weather conditions and travel disruptions make it essential that you ensure that you have payroll contingency plans in place. If you have a plan does it work? When was the last time you tested it? Does it incorporate HMRC's online filing requirements for both in-year and end of year?

Do you have a policy and procedure manual? Is it up to date and user friendly? How does the switch to online in-year filing of starter and leaver information impact on your procedures and processes?

This course is ideal for those new to the supervisory and managerial role and for those responsible for the payroll who need to ensure that effective payroll procedures are in place or want to progress up the career ladder.

Students studying one of our distance learning programmes may find this course beneficial although not compulsory. Active students are offered a special price if they wish to attend and must state their student number when booking.

## Course Programme

- Fraud prevention
  - How to identify it and steps to take to prevent it
- Contingency planning
  - How to review and put together an effective plan
- Overpayments of salary
  - What are the correct procedures for recovering an overpayment from an employee?
- Written procedures manual
  - Important tips to ensure that your Written Procedures Manual is effective
- Checklists for the payroll
  - How to put together useful checklists to ensure that payroll is correct
- Monitoring errors on the payroll and remedial action
- Reconciliation
  - How to reconcile the payroll and make any necessary adjustments
- Setting deadlines
  - Setting deadlines for the payroll and communicating this to employees and heads of departments
- Bringing new members of the payroll team up to speed
- How to ensure that the payroll team are technically up to date
- Delegation
  - The first steps to delegation of tasks

### Duration

One day

### Venues & Dates

London: 23 May

### Fee to attend the course:

Member's fee: £378.25 + VAT

Non member's fee: £445 + VAT

Registered charities: £299 + VAT

\*Student fee: £299 + VAT

\* Please quote student number when booking a place (only applies to students actively studying with Payroll Alliance. Excludes students studying the award in PAYE & NIC Calculation and Payroll Technician's award).

*"Overall it acted as a reminder of the various consideration and work involved in producing the payroll accurately. I came away appreciating the responsibility my manager has ensuring all runs smoothly. It also confirms points/suggestions he has made to me e.g. why has this happened? Understand the problem and fix it."*

John Cunningham, Hess Services UK

6 hours



# Payroll Management Update

There will be changes to legislation which will affect the way that payroll is run. Some of the changes will happen fairly soon. These need to be planned for now and implemented in the next year. These changes will affect every payroll in the country and the ramifications are such that employers need to consider them now. The payroll department needs to ensure that they are leading and informing that planning. This course will keep you ahead of the game.

RTI becomes mandatory from April 2013 but HMRC has the power to bring individual employers into the scheme early. Software will cope with the reporting but payroll needs to review and implement changes to payroll timetables and information gathering.

A snapshot was taken of your payroll at 1 April 2012 to determine the date that you must apply Auto enrolment into pension schemes. Many pension departments do not realise that there are knock on effects for payroll administration that cannot be implemented overnight.

Changes have been proposed in the rights affecting maternity/paternity leave and pay; unpaid parental leave; flexible working requests; and the carry forward of untaken statutory leave due under certain circumstances, as well as moves to tackle the inequality between the pay of men and women. The changes to maternity/paternity/parental leave rights could come into effect from April 2015.

All of these changes are going to mean that payroll itself will need to change procedures and working practices. There will be a need to inform other departments who submit and receive information from payroll and an opportunity for Payroll to initiate the planning for change.

## Duration

One day

## Venues & Dates

Birmingham:	6 June
Edinburgh:	1 March
Leeds:	19 April
London:	25 April
Newcastle:	8 February
Reading:	13 June
Southampton:	1 May

## Fee to attend the course:

Member's fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

"Benefits: RTI, Payrolling  
 Childcare Vouchers -  
 Excellent course, full of  
 useful information for the  
 future- lots to think about &  
 plan for."

Deborah Epps, Lockheed Martin UK

## Course Programme

- Auto enrolment - preparing for the changes
- Real Time Information - preparing the way forward
- Payrolling Benefits in Kind, new reporting requirements and the increased demand on payroll
- Compliance and Penalty regimes and what you should be doing now
- New guidance on Pay In Lieu Of Notice and how to use internal HMRC guidance in your own procedures
- Output VAT on Salary Sacrifice
- Calculation of the new Deductions from Earnings Orders
- Proposals for:
  - Flexible Parental Leave
  - Carry forward of Statutory Leave
  - Flexible Working Requests
  - Equal pay
  - Cumulative NI for all employees

6 hours



# How to Manage a Project

Many organisations are faced with trying to select and implement a new payroll system, but where do you start? Maybe you have decided to bring in some professional help but you must still ensure that the project comes in on budget and on time.

The course is designed to help you with the process of payroll system selection and implementation by taking you through the key steps involved in each process. The course will provide you with the ability to manage a project with the focus on payroll. This would include not only selecting a new system but merging payroll and HR systems and taking over another company's payroll as a result of a merger or acquisition.

This course may be of benefit to students studying our distance learning courses. Attendance is not compulsory but a special rate is offered to active students if they quote their student number at the time of booking.

## Course Programme

**It will help you understand how to manage the critical elements of a project which include:**

- Providing a clear business case
- Balanced team
- Comprehensive planning
- Embedded quality
- Risk analysis
- Controlled authorisation
- Issue resolution

### The course:

- is directly related to the payroll function
- Includes practical exercises
- Makes it clear how the payroll department will benefit

### The course fees include:

- A comprehensive set of notes
- CD of templates which you can use on your return to the office

### Duration

One day

### Venues & Dates

Birmingham: 14 May  
London: 6 February  
22 March

### Fee to attend the course:

Member's fee: £378.25 + VAT  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT  
\*Student fee: £299 + VAT

\*Please quote student number when booking a place (only applies to students actively studying with Payroll Alliance but excludes students studying the Award in PAYE & NIC Calculations and the Payroll Technician's Award)

6 hours



**"The whole course has been invaluable"**

Kelly Kenningham, Ascertiva Group Ltd

# Statutory Maternity, Paternity, Adoption & Sick Pay

This practical course provides a full and comprehensive guide to the calculation and administration of the statutory payments of Maternity, Paternity, Adoption, Sick pay and leave. It will ensure that those attending will be competent to administer these schemes and be fully aware of who is eligible, the exclusions, how to manually calculate the payments, recover the correct amount from HMRC and keep the proper records as required by legislation.

The course will include the new entitlements to Additional Statutory Paternity Pay and Leave.

## Course Programme

### Statutory Maternity Pay (SMP)

- The terms used for SMP
- Who qualifies and who is excluded
- Notification rules for payment & leave
- Calculating the average earnings & payment
- How pay increases can affect SMP
- Bringing the maternity leave forward
- The maternity pay period & maternity leaver
- How to use the SMP tables
- Payment & recovery rates of SMP & year end reporting
- Form SMP1
- Maternity leave
- Maternity leave and RTI - irregular payment indicator
- The restriction on KIT days and the consequences of exceeding the limit
- Provision of non pay benefits during maternity leave

### Statutory Paternity Pay (OSPP & ASPP) & Statutory Adoption Pay (SAP)

- The terms used
- Who qualifies & who is excluded
- Notification rules for payment & leave
- Making the calculation & payment
- KIT days and their restrictions for employees on adoption leave
- Forms SC3, SC4, SPP1 & SAP1
- Payment & recovery rates & year end reporting
- Additional Statutory Paternity Pay and Leave
- Paternity and Adoption leave and RTI - irregular payment indicator

### Statutory Sick Pay (SSP)

- Basic terms
- Who qualifies and who is excluded
- Evidence of incapacity & linking sickness
- Medical Certificates
- Qualifying days & PIWs
- Calculating the average earnings & entitlement
- Form SSP1 and Employment Support Allowance (ESA)
- Long term sick leave and RTI - irregular payment indicator
- Recovering SSP from the Revenue & year end reporting

Practical exercises are provided throughout the day

### Duration

One day

### Venues & Dates

Birmingham:	19 June
Bristol:	20 February
Edinburgh:	17 April
Leeds:	15 May
London:	13 March
	5 June
	14 August
Southampton:	30 April

### Fee to attend the course:

Member's fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

"I found everything in today's course of great interest. I feel more confident in dealing with statutory payments."

Samantha Walker, Northern Rail

6 hours





# P11Ds, Benefits & Expenses

If you want to avoid making costly mistakes, this practical one day course will show you how to correctly identify benefits and expenses that must be reported on the P11D and P9D. Once the items have been correctly identified, we will show you how to accurately complete the forms. Although some year end reporting requirements will change under Real Time Information, employers will still be required to submit P9Ds and P11Ds for benefits and expenses provided throughout the tax year.

Entering the information in the correct fields is essential as some fields attract Class 1A. Overpaying Class 1A can be expensive but not as expensive as omitting to pay it! Fines and penalties for incorrect completion of the P11D and P9D can be punitive and may result in an HMRC compliance visit.

The course programme will include the changes to car CO2 ratings, fuel categories and P46(Car) procedures.

This course shows you how to calculate the cash equivalent and how to save time by obtaining dispensations. We also explain what a PSA is, how it is calculated and how it can benefit your company.

## Course programme

- What has changed?
- What is a PAYE Settlement Agreement?
- Deadlines and penalties
- Submission formats – paper forms, listing or online?
- Avoiding common errors particularly when declaring company cars and beneficial loans
- Calculating the cash equivalent for benefits in kind including
  - Company cars
  - Company vans
  - Employer provided fuel for cars and vans
  - Beneficial loans
  - Living accommodation
- Childcare vouchers – what must be reported?
- Expenses
- Professional membership fees
- Business entertaining
- Personal incidental expenses
- How to save time with dispensations
- How to differentiate between business and private travel
- Class 1A and Class 1B NICs
- HMRC Quality Standard for paper and electronic P11Ds
- Reporting procedures for payrolling benefits

Practical exercises are provided throughout the day

### Duration

One day

### Venues & Dates

Birmingham:	27 February 18 April
Leeds:	2 May
London:	10 April 22 May
Reading:	23 May

### Fee to attend the course:

Member's fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

*"It was very useful to be able to ask specific questions related to my work. Extremely useful course and I do recommend it."*

Aneta Ioncheva, Triland Metals Ltd

6 hours



# Payroll Perspective on Auto Enrolment

There are major changes coming to all aspects of pensions over the next few years that will affect employer, employees and payroll. This course will give you a comprehensive briefing on the current regime, the changes that will be brought in following the coalition government's review of the previous government's proposals and the affect this will have for those who pay or don't pay into pensions, those who deal with contributions and payments and those who hope to receive a pension in the future.

This is your chance to get an overall picture of the changes to pensions as they affect you both in payroll and answers to problems that will arise.

## Course programme

- The changes to employer duties under Pension Reform
- The future of the State Second Pension
- Government changes to Pensions Tax Relief
- Anti Avoidance legislation
- Major changes to the National Insurance system
- NEST employer duties and choices
- Effect of the changes to State Pensionable Age
- Impact of auto enrolment on Salary Sacrifice
- Information packs – what should they contain?
- Contractual enrolment – is this the answer?
- Or 'auto-enrolment' of all employees – what is the cost?
- Opting out of a pension Salary Sacrifice – what are the pitfalls?
- Key issues for new starters and those reaching 22 years of age
- Small payrolls – what are their staging dates if part of a larger organisation?
- Contractual enrolment to a non contributory pension
- TUPE transfers
- Protected pensions – key issues
- Case studies & exercises

### Duration

One day

### Venues & Dates

Birmingham:	5 June
London:	14 February
	21 May
	3 July
Southampton:	3 May

### Fee to attend the course:

Member's fee: £378.25 + VAT;  
 Non member's fee: £445 + VAT  
 Registered charities: £299 + VAT

"I would advise any payroll administrators to attend this course. It will not only be very helpful but it will be an eye opener."

Suzanne Burton, Protherics UK Ltd

6 hours



# Real Time Information

The basic operation of PAYE has remained largely unchanged since its introduction in 1944. However from April 2012, major mandatory changes will be introduced to improve the operation of PAYE known as Real Time Information (RTI) beginning with a one year pilot scheme and 1300 early adopters joining in July 2012. Furthermore it is anticipated that another 250,000 employers will become early adopters from October 2012.

Software will provide the mechanics of reporting RTI but payroll procedures and timetables will have to be revised to access and process information not currently held in payroll. What internal processes and procedures will need to change as a result of RTI?

Data quality will be crucial to the success of RTI and payroll will need to advise other departments of criteria and police data before it enters the payroll system.

The reporting of Real Time Information (RTI) will be mandatory and employers will be required to comply before October 2013 (with a few exceptions). Do you really know what your duties and responsibilities will be and what you need to do to prepare?

A further 250,000 employers have been invited to join the scheme early between November and March 2013 providing they meet certain criteria.

This practical one day workshop is designed to take you through what you need to know. Preparation must begin now to ensure a smooth transition to RTI. We will help you address any concerns surrounding the preparation and implementation of RTI.

## Course Programme

- Timetable for introduction
- Data Items – What items are required?
- Preparing for RTI
- How will RTI information be submitted?
- Alternative options for EDI users
- What is a hash and why is it crucial for RTI?
- BACS Submission – this is HMRC's preferred method, which has been postponed but until when?
- Software development charges – can these be applied?
- Early Adopters – meeting the criteria
- Data access – some required data items are not retained by employers; such as hours worked
- NINO verification and required action where no NINO is present
- Changing your employee/pensioner payroll numbers
- Replacement of forms P45, P46, and P14s
- Leaver's statement
- What happens with P46 Expat form?
- Data alignment – HMRC will require a match of data led by specific criteria
- What is EPS and FPS and when do they have to be submitted?
- PAYE schemes with multiple splits
- Data Protection – HMRC may require further information relating to specific deductions
- Dealing with overpayments and underpayments
- Making corrections and reversing payments
- Out of cycle pay adjustments, how will these be treated?
- Payments to Debt Management & Banking
- Additional pay periods e.g. week 56 payments
- Tax Year End procedures, what will change?
- Reporting of benefits and expenses – will this change?
- Payrolling benefits
- Non compliance issues post April 2013 – Possible penalty charges

### Duration

One day

### Venues & Dates

Birmingham:	25 January 22 March
Bristol:	21 March
Edinburgh:	26 February
Glasgow:	24 May
Leeds:	15 March 1 May
London:	23 January 28 February 26 March 26 April 27 June
Manchester:	7 February
Newcastle:	7 February
Reading:	17 January
Southampton:	17 January

### Fee to attend the course:

Member's fee: £378.25 + VAT;  
Non member's fee: £445 + VAT  
Registered charities: £299 + VAT

The course content covered all relevant aspects and gave more information about what needs to be done."

Michael Youseman, The Maersk Company Ltd

6 hours



# RTI & Auto Enrolment

NEW COURSE FOR 2013

This one day course is ideal for those who want an overview of these important changes which will affect all employers and want to focus on the key issues.

For those who need a more in depth hands-on course with practical exercises we offer a one day course on Real Time Information and a separate course on the Payroll Perspective on Auto Enrolment.

## Real Time Information

- What is Real Time Information?
- Why is RTI being introduced?
  - Facilitate introduction of the Universal Credit
  - Improve operation of PAYE
- From when will we have to submit RTI data?
  - The RTI pilot – particularly from November 2012 to March 2013
  - April 2013
  - Largest employers
- What RTI returns will we have to submit?
- How do we prepare for RTI?
- Timing of First Submission
- How will our starter & leaver procedures be affected by RTI?
- How will our year-end payroll procedures be affected by RTI?

## Automatic enrolment in to pension saving

- What is automatic enrolment into pension saving?
- What pension schemes will qualify under auto-enrolment?
- Understanding the new 'language' of auto-enrolment
- When will we be required to come under auto-enrolment duties?
- How do we assess which of our workers will be affected by auto-enrolment?
- What will auto-enrolment require of us in practice?
- Worker postponement period
- Eligible jobholder postponement period
- DB transitional postponement
- Why will we have to monitor our workforce for on-going auto-enrolment entitlement?
- How do I deal with starters under auto-enrolment?
- What are the pension contributions due under auto-enrolment?
- How could we use a salary sacrifice scheme to finance pension contributions?

### Duration

One day

### Venues & Dates

Birmingham:	24 January
	20 February
Bristol:	17 April
Edinburgh:	27 February
Glasgow:	21 May
Leeds:	6 February
London:	17 January
	21 March
	16 May
	25 June
Manchester:	8 February
Newcastle:	6 February
Reading:	18 January
Southampton:	18 January

### Fee to attend the course:

Member's Fee: £378.25 + VAT  
 Non member's fee: £445 + VAT  
 Registered charities fee: £299 + VAT

6 hours



# Spring Payroll Update 2013

If you only attend one course a year, this is the one for you, as the course will ensure that you are fully up to date with essential changes in legislation for the tax year. This one day course provides you with a practical update of all the changes that will affect the payroll in the coming year, plus proposed changes such as the flexible parental leave and how this will impact on your employees.

The course programme and course notes are updated on an ongoing basis throughout the year to ensure that all new changes are included.

## Course Programme

- The 2013 Budget and what has changed
- Changes to NI, new limits and percentages
- NIC and earnings bands and rates
- Tax rates, tax bands and percentages
- SSP, SMP, OSPP, ASPP and SAP rates
- NEST and the latest update on auto enrolment
- Holiday and sick leave – latest update
- Review of salary sacrifice & maternity pay
- Basic rate tax relief on childcare vouchers – the latest update
- Benefits & expenses – what are the changes?
- Changes to DEOs being introduced by the Child Maintenance Group
- Increase to Scottish Arrestments Employment law changes that impact on payroll
- National Minimum Wage rates and changes
- Redundancy and compensation rates changes
- Student Loan deduction threshold changes
- Latest update on Real Time Information
- New Flexible Parental Leave proposals
- Legislation Changes as they are announced during the year

### Duration

One day

### Venues & Dates

Birmingham:	25 April
Glasgow:	22 May
Leeds:	2 May
London:	24 April
Southampton:	2 May

### Fee to attend the course:

Member's Fee: £378.25 + VAT

Non member's fee: £445 + VAT

Registered charities fee: £299 + VAT

6 hours



# RTI Issues for Payroll Bureaux & Agents

NEW COURSE FOR 2013

Real Time Information is the biggest change to PAYE in over 60 years. It will affect all employers regardless of size, but will in particular have a fundamental impact on payroll bureaux and agents running client payrolls. This course focuses on the key issues that agent and bureaux face in the run up to RTI and explore ways of how they can overcome many of the obstacles.

With the exception of very small employers with complex payrolls, all employers must be using RTI by October 2013 when Universal Credits are introduced.

The majority of employers in the UK employ 4 or less people and this major change has made many transfer their payroll processes to agents and payroll bureaux. RTI doesn't change the way the payroll is calculated but it does have a major impact on processes and procedures, particularly for organisations running client payrolls.

## Course Programme

- RTI timetable
- Joining the pilot
- RTI terms
- HMRC letters to employers – October 2012 & January 2013
- Communicating direct with clients
- Service Level Agreements (SLA)
- Cost modeling
- RTI implementation – timing is the issue
- Balancing the books before joining RTI
- Key information for data matching
- Data cleansing
  - Does the current payroll software validate existing data?
  - Formatting of employee's name
  - Post codes in incorrect fields
  - Employee gender
- Open Forum
- Summary of RTI key issues
  - manual payments
  - clients advising agent/bureau after payment is made
  - Directors – paid bonuses after year end
  - Wives paid below LEL
  - Casuals
  - CIS schemes
  - Starters & leavers
  - New payroll numbers
  - Irregular payment indicator
  - Timing of delivery of information
- Employer Payment Summary (EPS) – making adjustments
- Data transfer from previous provider
- New provider – new EAS?
- When should the Full Payment Submission (FPS) be run?
- When should the FPS be created?
  - does the payroll software run FPS automatically?
- What validation routines does the payroll software perform? (Does it prevent rejections?)
- Rejection codes
- BACSIP software upgrade?
- Hash recognition
- Who runs the BACS?
- Basic PAYE Tools
- National Insurance Verification Request (NVR)

### Duration

Half day (a.m.)

### Venues & Dates

Birmingham: 21 February a.m.  
 Glasgow: 26 February a.m.  
 Leeds: 5 February a.m.  
 London: 25 January a.m.

### Fee to attend the course:

Member's fee: £208.25 + VAT  
 Non member's fee: £245 + VAT

Book by 11 January 2013 and receive an early bird discount £12.50

Book the RTI Issues for Payroll Bureaux and Agents and the Data Cleansing Workshop on the same day and a light lunch will be included.

3 hours



# Data Cleansing Workshop

NEW COURSE FOR 2013

This half day training workshop is designed to help you to plan and prepare your payroll in advance for the payroll alignment process when you first join RTI. All payrolls must take part in this alignment process.

All payrolls with more than 250 employees will be required to submit to HMRC a separate Employer Alignment Submission consisting of the personal details such as name, National Insurance Number, date of birth, gender and address for all employees/pensioners on their payroll database. HMRC will use this information to update their records prior to the first Full Payment Summary generated by the next payroll run.

Employers with less than 250 employees must include the personal information with their first Full Payment Summary but may use an Employer Alignment Summary to ease the process. Furthermore it is not possible to amend the alignment once submitted to HMRC. Although where there are sufficient errors HMRC may ask you to restart the entire alignment process.

Employers taking part in the Pilot of the RTI scheme have confirmed that the time spent on checking the integrity of the data you hold is a key factor in ensuring that the transition to RTI is as smooth as possible.

Examples will be given of the common entries on payrolls that will not meet HMRC validation rules.

## Course Programme

- Overview of the Data Alignment process
- The data items required for Alignment
- HMRC process for matching employer data to HMRC records
- What is acceptable data in the fields for:
  - National Insurance Number
  - Surnames and forenames
  - Date of birth
  - Gender
  - Address
- What can you do about existing data
- Collecting accurate data from new starters
- Maintaining accurate data

### Duration

Half day (p.m.)

### Venues & Dates

Birmingham:	21 February p.m.
Glasgow:	26 February p.m.
Leeds:	5 February p.m.
London:	25 January p.m.

### Fee to attend the course:

Member's fee: £208.25 + VAT  
Non member's fee: £245 + VAT

Book by 11 January 2013 and receive an early bird discount £12.50

Book the RTI Issues for Payroll Bureaux and Agents and the Data Cleansing Workshop on the same day and a light lunch will be included.

3 hours



# Tax Year & Legislation Update 2013

NEW COURSE FOR 2013

This half day course is essential for all payroll professionals as it provides a practical update of some fundamental changes that will be applied to the payroll, for employers for the new tax year.

The course will brief you and your staff on what you need to do to get ready for RTI by examining current procedures and cleansing the data you hold on file. We also look at the effects of these changes and highlight the issues that will affect your employees, preparing you and your staff for queries and enabling you to ensure that employees and the management are kept fully up to date.

The subjects will include but will not be limited to:

- Latest update on Real Time Information
- Latest update on Auto enrolment
- NIC thresholds for 2013/14
- Tax bands for 2013/14
- New emergency tax code
- Student Loan Threshold
- Statutory Payment rates for 2013/14
- Adjustments to P45 codings
- Redundancy & compensation rates
- Changes to DEOs being introduced by the Child Maintenance Group
- Increase to the Scottish Arrestment rates

## Duration

Half day (p.m.)

## Venues & Dates

Birmingham:	21 March p.m.
Bristol:	20 March p.m.
Edinburgh:	28 February p.m.
Leeds:	14 March p.m.
London:	7 March p.m.
	27 March p.m.
Manchester:	13 March p.m.

## Fee to attend the course:

Member's fee: £208.25 + VAT

Non member's fee: £245 + VAT

Members who attend the Working Meeting on the same day, can attend this course for a special price of £189 + VAT

3 hours





## Working Meetings – For members only

Only Payroll Alliance members are invited to the free Working Meetings, held in the morning and you have the option of attending our afternoon course at a special discounted price.

The Working Meetings are an excellent way of keeping abreast of payroll changes and a great opportunity to network with fellow professionals.

### Course Programme

Previous events have included speakers from:

- Ceridian on Business Continuity Plans
- HM Revenue and Customs (HMRC) providing a payroll update for the tax year on legislation changes
- The Child Support Agency (CSA) on Deduction from Earnings Orders and the latest news regarding the CSA
- The Fraud Advisory Panel on identity fraud
- AON consulting on Flexible Benefits and Personal Pension Accounts
- Smith & Williamson on PAYE audits and PSA agreements and Termination Payments
- Albany Software on the new faster Payments System
- P & MM on cycle to work and bus to work schemes
- HMRC on the new NPS computer system and the new PAYE Desktop Viewer
- ADP on e-payslips and employee self service
- Albany Software on an update to Faster Payments, new facilities to pay employees overseas and business continuity plans
- Eversheds on current position of holiday pay and sickness
- HMRC on Real Time Information and Student Loan Deductions
- HMRC on National Minimum Wage
- HMRC on Real Time Information update and data cleansing
- Child Maintenance Group on changes to Child Maintenance & DEOs

This event is for members only. Employers that are members of Payroll Alliance can send up to two delegates from their organisation to this event FREE OF CHARGE.

Students studying one of our distance learning courses and graduate members can attend free of charge (student or graduate member only, excludes students studying Award in PAYE & NIC Calculations and Payroll Technician's Award).

#### Duration

Half day (a.m.)

#### Venues & Dates

Birmingham:	21 March a.m.
Bristol:	20 March a.m.
Edinburgh:	28 February a.m.
Leeds:	14 March a.m.
London:	7 March a.m.
	27 March a.m.
Manchester:	13 March a.m.

#### Fee

Member's fee FREE

Only available to:

Corporate Members

(2 places twice a year),

Student Associate members

(1 place twice a year)

Graduate members

(1 place twice a year)

#### Payroll Alliance members

If you would also like to attend the afternoon course don't forget to claim your discount.

"For all busy payroll professionals out there these meetings are an absolute must both for updates and networking. Even with over 25 years of payroll behind me there are always items new and old to review, air and share."

Colin Frith GHG

3 hours



## In house training

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All of the courses displayed in this training brochure can be run on an in house basis at your premises on a date that is convenient to you and your team. They are particularly cost effective if you have four or more people to train.

We can tailor the programme to suit your specific requirements, often at no extra cost.

Many of our clients find that "cascade" training does not work as information is often lost or misinterpreted when passed down the line.

With the recession, so many employers are cutting back on training, thinking that they can save money and that the information their staff need is available on the internet anyway. However, in the long run this is a false economy. Trying to research this information and find time for all the team to absorb it is not always that easy.

Whereas, by scheduling a day's training with a tailored programme, allows the whole team to come together to focus, discuss and reflect on those subjects that are of particular relevance to their organisation. In that way they can derive maximum benefit from the day.

One of the most popular in house courses we run on a regular basis for clients is the Annual Payroll Update, which provides staff with up to date information at the same time and helps them prepare for the year ahead. The RTI course has also proved to be particularly popular as it provides employers with the opportunity to bring Payroll, HR, Finance and IT together for the course.

We can also put together a completely bespoke programme to match the specific needs of your organisation which may be a selection of subjects from various courses which would make the day very cost effective.

In addition we can also offer the following courses:

- Construction Industry Scheme
- Tax Year End & P11Ds
- Termination Payments
- Paying Employees in Guernsey & Jersey
- PAYE Compliance visits
- Writing an Effective Policy and Procedure Manual
- Irish Payroll Workshop
- Pensioner Payroll
- Real Time Information
- Annual Payroll Update
- RTI & Auto-enrolment
- Payroll for Beginners
- Salary Sacrifice
- Project Management

"Our experience of in-house training has been very positive. It has allowed us to tailor the sessions to cover issues that are affecting us, with the added convenience of still being close to the office should any urgent issues arise.

Everyone looks forward to the day and it is part of their personal development and we ask them to contribute subjects to be included in the course.

Brad was brilliant with his professional approach, [his] vast knowledge and experience made it an enjoyable day.

Our aim is to continue with the training every year as the benefits far out way the cost."

Colin Turner, Payroll Accounting Manager FSC Payroll Services, Transport for London

For further information please call 020 8401 1828/29

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# Why become a member of Payroll Alliance?

Payroll Alliance has been providing training and information to the payroll industry for 28 years. The benefits of membership include: unlimited access to the Technical Helpdesk, two free places twice a year at our half day conferences run nationwide (Working Meetings), discounts on training and qualifications and a wealth of industry standard publications.

Gold and Diamond members also have access to Payroll Direct Online Resources.

<h2 style="text-align: center;">Silver</h2> <ul style="list-style-type: none"> <li>• Expert payroll helpdesk</li> <li>• Pay&amp;Benefits magazine</li> <li>• Working Meetings x2</li> <li>• Payroll Key Series</li> <li>• Payroll Fact File</li> <li>• NIC Handbook</li> <li>• Online Member Forum</li> <li>• Payroll Calendar</li> <li>• 15% discount on training</li> <li>• 10% discount on Distance Learning</li> <li>• 20% discount for payroll recruitment</li> </ul> <p style="text-align: center;"><b>£460</b></p> <div style="background-color: #76b82a; color: white; padding: 5px; text-align: center; border-radius: 5px;">                 Includes  <b>£761.95</b>                  worth of                  industry                  publications             </div>	<h2 style="text-align: center;">Gold Online</h2> <ul style="list-style-type: none"> <li>• Expert payroll helpdesk</li> <li>• Pay &amp; Benefits magazine</li> <li>• Working Meetings x 2</li> <li>• Access to Payroll Direct Online (1 user) which includes the following publications:</li> <li>• -Payroll Key Series</li> <li>• -Payroll Fact File</li> <li>• -NIC Handbook</li> <li>• -Pay &amp; Benefits Manual</li> <li>• Payroll Calendar</li> <li>• 15% discount on training</li> <li>• 10% discount on Distance Learning</li> <li>• 20% discount on payroll recruitment with industry partners</li> </ul> <p style="text-align: center;"><b>£499</b></p> <div style="background-color: #76b82a; color: white; padding: 5px; text-align: center; border-radius: 5px;">                 Includes  <b>£946.95</b>                  worth of                  industry                  publications             </div>	<h2 style="text-align: center;">Gold</h2> <ul style="list-style-type: none"> <li>• Expert payroll helpdesk</li> <li>• Pay&amp;Benefits magazine</li> <li>• Working Meetings x2</li> <li>• Payroll Key Series</li> <li>• Payroll Fact File</li> <li>• NIC Handbook</li> <li>• Pay &amp; Benefits Manual</li> <li>• Online Member Forum</li> <li>• Payroll Calendar</li> <li>• 15% discount on training</li> <li>• 10% discount on Distance Learning</li> <li>• 20% discount on payroll recruitment with industry partners</li> <li>• Access to Payroll Direct Online Resources (1 user)</li> </ul> <p style="text-align: center;"><b>£575</b></p> <div style="background-color: #76b82a; color: white; padding: 5px; text-align: center; border-radius: 5px;">                 Includes  <b>£1,109.74</b>                  worth of                  industry                  publications             </div>	<h2 style="text-align: center;">Diamond</h2> <ul style="list-style-type: none"> <li>• Expert payroll helpdesk</li> <li>• Pay&amp;Benefits magazine</li> <li>• Working Meetings x2</li> <li>• Payroll Key Series x2</li> <li>• Payroll Fact File x2</li> <li>• NIC Handbook x2</li> <li>• Pay &amp; Benefits Manual x2</li> <li>• Online Member Forum</li> <li>• Payroll Calendar</li> <li>• 15% discount on training</li> <li>• 10% discount on Distance Learning</li> <li>• 20% discount on payroll recruitment with industry partners</li> <li>• 2 full free training days</li> <li>• Access to Payroll Direct Online Resources (2 users)</li> </ul> <p style="text-align: center;"><b>£995</b></p> <div style="background-color: #76b82a; color: white; padding: 5px; text-align: center; border-radius: 5px;">                 Includes  <b>£1,939.97</b>                  worth of                  industry                  publications                  PLUS  <b>£756.50</b>                  worth of                  training             </div>
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Silver and Gold membership prices increase with effect from 1 September 2012

“Please pass on my praise to the staff on the Technical Help Desk – I have had cause to ring a few times recently and the staff are not only experts, they are very good communicators! They are always very pleasant to talk to. So thank you – and them!”  
 Vera White, London Borough of Newham

For further details, to apply to be a member or to book a free trial please visit our website [www.payrollalliance.com](http://www.payrollalliance.com)

# Calendar of Events

	London	Birmingham	Bristol
<b>Level 1</b>			
Payroll for Beginners	16 Jan, 22 May, 11 July	19 Feb	16 April
<b>Level 2</b>			
Foundation in Tax, NI, Starters & Leavers (Payroll Foundation A & B)	11-12 March, 3-4 June, 12-13 August	17-18 June	18-19 February
Foundation in Statutory, Maternity, Paternity, Adoption & Sick Pay (Payroll Foundation C)	13 March, 5 June, 14 August	19 June	20 February
Foundation in Payroll Legalities & Practicalities (Payroll Foundation D)	14 March, 6 June, 15 August	20 June	21 February
BTEC Examination for the Professional Award in Payroll Administration (Payroll Foundation E)	15 March, 7 June, 16 August	21 June	22 February
Payroll Foundation Course Package – BTEC Edexcel Level 4	11-15 March, 3-7 June, 12-16 August	17-21 June	18-22 February
<b>Level 3</b>			
Payroll Refresher	20 March, 24 May, 4 July	24 April	
A Practical Guide to Salary Sacrifice	19 March	05 March, 19 June	
Employment Law for Payroll	6 March, 13 June		
Introduction to Finance - how to get Finance to work for you	7 February	15 May	
A Practical Introduction to Irish Payroll	5 March		
Introduction to Payroll for Global Employees	11 April	3 July	
<b>Level 4</b>			
Advanced Payroll for Global Employees		28 Feb	
Advanced Practical Guide to Irish Payroll	6 March		
Advanced Payroll		6 March	
<b>Payroll Management Courses</b>			
Run, Plan Manage the Payroll Function	23 May		
Payroll Management Update	25 April	6 June	
How to Manage a Project	6 Feb, 22 Mar	14 May	
<b>Essentials</b>			
Statutory Maternity, Paternity, Adoption & Sick Pay	13 March, 5 June, 14 August	19 June	20 February
Payroll Perspective on Auto Enrolment	14 February, 21 May, 3 July	5 June	
P11Ds, Benefits & Expenses	10 April, 22 May	27 February, 18 April	
Real Time Information	23 Jan, 28 Feb, 26 Mar, 26 Apr, 27 June	25 Jan, 22 March	21 March
RTI & Auto Enrolment	17 Jan, 21 Mar, 16 May, 25 June	24 Jan, 20 February	17-April
Spring Payroll Update 2013	24 April	25 April	
<b>Half Day Courses</b>			
RTI Issues for Payroll Bureaux and Agents – <b>NEW COURSE for 2013</b>	25 January a.m.	21 February a.m.	
Data Cleansing Workshop – <b>NEW COURSE for 2013</b>	25 January p.m.	21 February p.m.	
Tax Year & Legislation Update 2013 – <b>NEW COURSE for 2013</b>	7 March p.m. 27 March p.m.	21 March p.m.	20 March p.m.
MEMBER ONLY - Working Meetings	7 March, 27 March	21 March	20 March

# Calendar of Events

Edinburgh	Glasgow	Leeds	Manchester	Newcastle	Reading	Southampton	Members price	Non Members price
	23 May				12 June			
15-16 April		13-14 May					£641.75 + Vat	£755 + Vat
17 April		15 May					£378.25 + Vat	£445 + Vat
18 April		16 May					£378.25 + Vat	£445 + Vat
19 April		17 May					£378.25 + Vat	£445 + Vat
15-19 April		13-17 May					£1486.65 + Vat	£1749 + Vat
		18 April					£378.25 + Vat	£445 + Vat
		17 April					£378.25 + Vat	£445 + Vat
			24 April				£378.25 + Vat	£445 + Vat
							£378.25 + Vat	£445 + Vat
		11 June					£378.25 + Vat	£445 + Vat
		30 April					£378.25 + Vat	£445 + Vat
		1 May					£378.25 + Vat	£445 + Vat
							£378.25 + Vat	£445 + Vat
		3 May					£378.25 + Vat	£445 + Vat
							£378.25 + Vat	£445 + Vat
1 March		19 April		8 February	13 June	1 May	£378.25 + Vat	£445 + Vat
							£378.25 + Vat	£445 + Vat
17 April		15 May				30 April	£378.25 + Vat	£445 + Vat
						3 May	£378.25 + Vat	£445 + Vat
		2 May			23 May		£378.25 + Vat	£445 + Vat
26 February	24 May	15 March, 1 May	7 February	7 February	17 January	17 January	£378.25 + Vat	£445 + Vat
27 February	21-May	6 February	8 February	6 February	18 January	18 January	£378.25 + Vat	£445 + Vat
	22 May	2 May				2 May	£378.25 + Vat	£445 + Vat
	26 February a.m.	5 February a.m.					£208.25 + Vat	£245 + Vat
	26 February p.m.	5 February p.m.					£208.25 + Vat	£245 + Vat
28 February p.m.		14 March p.m.	13 March p.m.				£208.25 + Vat	£245 + Vat
28 February		14 March	13 March				FREE	Members only

# How to make your booking

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1. Select the course(s) you wish to attend from the brochure, making a note of the relevant course fee(s) for your organisation.
2. Complete the 'Course & Delegate Details' and 'Contact Details' section of the form opposite, making sure you provide a full telephone number and e-mail address and your postcode.
3. Calculate the VAT on the total amount and add it to the total course fee. We will send you a VAT receipt after receiving your payment, which, if your organisation is eligible, can be used to reclaim VAT.
4. Complete the 'Payment Details' section.  
You can pay by cheque (payable to LexisNexis), credit card, or we can invoice you – whichever is most convenient.
5. Return your form to us or you can book your place online. If you have any questions then please call telephone number 020 8401 1828/29

**Web:** [www.payrollalliance.com](http://www.payrollalliance.com)

**E-mail:** [payroll.alliance@lexisnexis.co.uk](mailto:payroll.alliance@lexisnexis.co.uk)

**Fax to:** 020 8401 1811

**Post to:** LexisNexis Payroll Alliance FREEPOST RSJB-BBCX-SEBJ, Sutton, Surrey, SM2 5AS

The quoted course fee includes for each delegate: lunch if the course duration is not less than one full day; tea or coffee at refreshment breaks; course notes and handouts; and a personalised Certificate of Attendance. Cancellation of a booking will be accepted in writing without incurring any administration charge if made not later than 14 days before the first day of the course. Where cancellation is made within 14 days of the first day of the course the quoted course fee after any discounts will be payable in full. A written request to transfer a booked delegate from one course onto another course in the same season's programme, or to substitute one delegate with another, will be accepted subject to the numbers on the courses without incurring any administration charge if made not later than 14 days before the first day of the course. You may only transfer once. Further transfers will incur charges. Where a transfer or substitution request is accepted within the 14 days of the first day of the course an administration charge of £60 will be payable. Course schedules and details are subject to variation without notice and may differ from those shown in this leaflet.

**Disclaimer:** Our courses are not intended to be comprehensive but are merely intended to be a general guide to the law in relation to payroll and cannot be a substitute for legal or financial advice. Neither the company nor the speakers accept any responsibility for loss occasioned to any person acting or refraining from acting as a result of material contained in the training manuals or the content of the course.

Registered Number: 2746621 England VAT Registered No. 730 8595 20



# Payroll Alliance Training Booking Form

## Course & Delegate Details

Spring 2013 - Please complete all sections in BLOCK CAPITALS

### Delegate 1

Course Title ..... Course Date ..... Location .....

Title ..... First Name ..... Surname .....

Position ..... Department ..... Direct Tel No: .....

E-mail ..... *Joining instructions will be sent by email. Please ensure that it is complete and legible.*

### Delegate 2

Course Title ..... Course Date ..... Location .....

Title ..... First Name ..... Surname .....

Position ..... Department ..... Direct Tel No: .....

E-mail ..... *Joining instructions will be sent by email. Please ensure that it is complete and legible.*

### Delegate 3

Course Title ..... Course Date ..... Location .....

Title ..... First Name ..... Surname .....

Position ..... Department ..... Direct Tel No: .....

E-mail ..... *Joining instructions will be sent by email. Please ensure that it is complete and legible.*

## Contact Details

Organisation ..... No. of Payroll Staff ..... No. of Employees .....

Address .....

Town ..... County ..... Postcode .....

Telephone ..... Fax ..... E-mail .....

*I understand that this booking is subject to the cancellation terms set out in this brochure.*

Authorised Signature ..... Date .....

(all bookings must be signed)

Your details will be held on our database to enable us to process your order and so that you can be kept up-to-date with relevant details of future events and publications. Sometimes they may be available for marketing purposes. If you do not wish to receive such information please contact us.

For details of our privacy policy please visit our website at [www.lexisnexis.co.uk/privacy-policy](http://www.lexisnexis.co.uk/privacy-policy)

## Membership Details

Please tick as appropriate

- We are members of Payroll Alliance and wish to claim our 15% discount  
Membership Number ..... (Must be entered to gain members discount)
- We are not members of Payroll Alliance and are not eligible for the 15% discount.
- We are a registered charity and wish to claim the special price for charities of £299 plus VAT for a one day course.  
Our registered charity number is .....

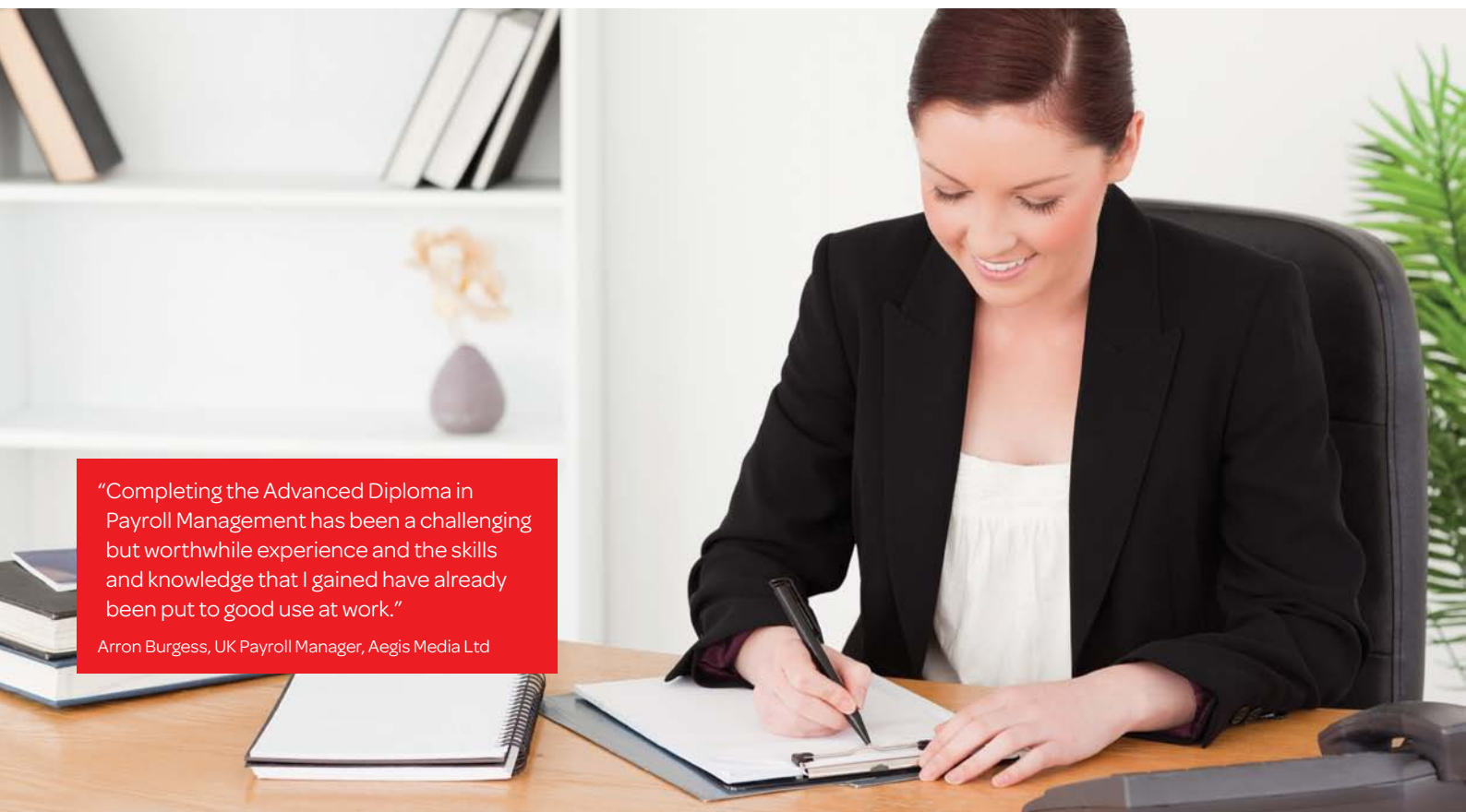
## Payment Details

Please select one option only - a VAT receipt will be sent once we receive your payment

- We wish to pay by pre-paid training voucher (this will be deducted from your allowance)
- Please invoice me/my organisation (please delete as appropriate) My purchase order number is .....
- I enclose a cheque made payable to LexisNexis Payroll Alliance

# We want you to succeed

Payroll Alliance Qualifications BTEC levels 2 to 5



"Completing the Advanced Diploma in Payroll Management has been a challenging but worthwhile experience and the skills and knowledge that I gained have already been put to good use at work."

Arron Burgess, UK Payroll Manager, Aegis Media Ltd

## Classroom Course

- Award in Payroll Administration BTEC level 4 (5 days)

## We offer the following distance learning courses:

- Certificate in Payroll Practice (6 to 9 months)
- Diploma in Payroll Supervision (12 to 15 months)
- Advanced Diploma in Payroll Management (24 months)

## Our fees include:

- Paper study materials
- Audio visual lectures
- Audio lectures can be downloaded onto MP3 players
- Online report writing course
- Online student & tutor forums
- Access to results online 24/7
- Free weekday workshops
- Managers can track student's progress online
- 10% discount for fast track

## We also offer two short online qualifications with optional classroom tuition:

- Award in PAYE & NIC (BTEC level 2) (6 to 8 weeks)
- Payroll Technician's Award (BTEC level 4) (6 to 8 weeks)

## And our fees include:

- Study materials, practical exercises, audio visual lectures
- Exam charges for achievement of the qualification

Optional classroom courses for £299 (+VAT)

Email: [payroll.alliance@lexisnexis.co.uk](mailto:payroll.alliance@lexisnexis.co.uk)

Fax: 020 8401 1811

Course information: 020 8401 1828/9



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