



Guide to working with Aviva via pensionsync

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1 The fastest way to ask for support from the pensionsync team is via online chat, which you can access from within pensionsync. Please refer to the last section in this document on how to use out Chat tool



Open an account with Aviva

You must have opened an account with Aviva before you can use pensionsync to send data to Aviva.

In order to get the best rates from Aviva, you must be a pensionsync account holder before applying to Aviva for a scheme and by clicking on the link within pensionsync, this will ensure those rates apply when you open your scheme.

When you open your account Aviva will give you a Username and Password. We refer to this as the “pension provider’s Username and Password” or as “your pension provider credentials”.

Aviva can be used by Employers as well as Business Advisers. As a Business Adviser, it is necessary that your account with Aviva has “delegated authority” to access your Client’s Aviva pension scheme (if your Client already has an Aviva pension scheme). If you do not have delegated authority then you do not have permission from Aviva to upload data to your Clients scheme (either via pensionsync or directly via the Aviva online portal).

If you or your Client does not have an existing scheme with Aviva then you can use your Aviva account to apply for a new scheme.

As a pensionsync account holder, you may have access to the scheme management tool, which provides a dashboard of all your schemes in one ‘easy to manage’ area. Please check with your payroll software provider.

How to apply for a new pension scheme with Aviva

Can I apply for an Aviva scheme within pensionsync?

Yes, you can apply to Aviva through the link in pensionsync. Go to “New Scheme” and click on the Aviva link in order to do this.

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Which provider has your Client instructed you to create an account with?

I acknowledge that: (a) This selection of pension providers does not represent every pension provider in the market, nor does it represent a filtered list of pension providers who may be suitable for my client's needs. (b) I am acting on behalf of my Client who has instructed me in writing to open an account with the pension provider I am about to select. (c) I agree with the [Privacy Policy](#).



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We recommend that prior to selecting a workplace pension provider, Employers are directed to [The Pensions Regulator website](#), an independent financial adviser or an online pension provider selection tool.

Although the scheme cannot be completed in pensionsync, this will secure a better deal for you and your clients. Once you have opened an Aviva account (for yourself or for your Employer) then you can use pensionsync to submit data to that scheme. Aviva can provide a quote on-line within just 10 minutes with their quick and easy “Quote & Apply” service.

Note, there are two steps to applying for an Aviva scheme and the information required is as follows:

Step 1: Requesting a quote

How many people in your business are aged 22 or above, including you?
Of those, how many earn over £10,000 per year?
What is their combined annual basic pay?
What is your company's staging date?
Do you want the pension contributions to be based on qualifying earnings?
Contributions for the scheme - Employer (%)
Contributions for the scheme - Employee (%)
Details of Employer; Title, Full Name, Email Address

Step 2: Applying for a scheme

Registered name of your business
Name to appear on policy documents
Business Address if full
Company registration number
PAYE reference number
Staging date
Company start date
Payroll Provider



Scheme administrator details

Additional scheme management system user details (if applicable)

Contact for invoicing

Contact for legal notices

Authorised signatory

Name of your bank or building society

Business account name

Business bank account number

Sort code

Preferred date of employer pension charge

Billing address

Confirmation you are an authorised account holder

Working with an existing Aviva scheme

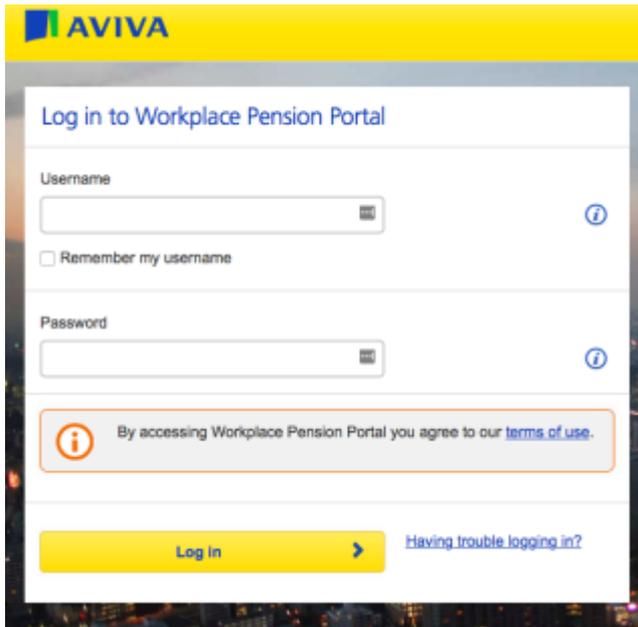
You are able to send data to an existing Aviva scheme however you must link the existing scheme with pensionsync first by completing the following steps:

1. Configure Your Payroll Software. This only needs to be completed once. You may need to change the settings within your payroll software to enable submitting data to Aviva, via pensionsync. **Please note that authorisation of the Aviva scheme may need to take place on saving your settings, and it is important you have switched off your pop-up blocker as this registration window could appear in the form of a pop-up.**

For more help, we recommend you either:

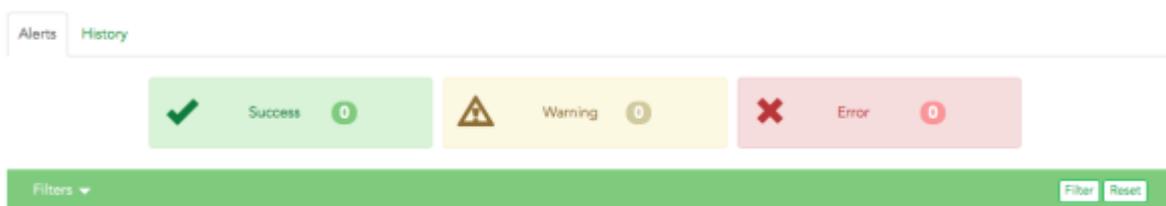
- a. refer to the User Guide section of our website for information specific to your payroll software product, or
 - b. contact your payroll software's customer support team
 - c. contact our support team using the in-built chat tool inside pensionsync
2. Complete your payroll as normal for that pay period. You can then attempt submitting data to us. The beauty of pensionsync is that we will validate and check for errors and you will be informed and able to make corrections within your payroll software before the file is submitted to Aviva. If you do experience an error message, either thrown up by your payroll software, or within pensionsync, then follow these instructions:
 - a. Check the "Alerts" within pensionsync. There will be an explanation of the error and what you need to do to correct this. If you need our help, then please use our chat tool to speak to one of our support team.
 - b. If you are unable to open pensionsync then please call your payroll software customer support team, or email us at support@pensionsync.com.

Aviva's new billing platform can be used via pensionsync for existing and new customers, you can access the Workplace Pension Portal [here](#).



Using the Alert dashboard

We recommend you check your “Alert” dashboard at regular intervals. pensionsync uses the “Alert” dashboard to notify you of any actions that may require your attention.



If you have submitted data successfully, the alert will appear in the green “Success” tab.

If you have submitted data, and it requires further actions, you will receive an alert in the yellow “Warning” tab.

If you have submitted data and errors have occurred, then you will receive an alert in the red “Error” tab.

5 The fastest way to ask for support from the pensionsync team is via online chat, which you can access from within pensionsync. Please refer to the last section in this document on how to use out Chat tool



Some errors can be corrected from within this section, however the error may have occurred in your payroll software, so you may have to go into your payroll and make appropriate corrections prior to proceeding.

If the error is unknown, we advise you contact us via the chat tool (see the last section of this document for information on how to chat online with our support team).

You can delete alerts once they are dealt with, and they will appear in the history section of alerts so you can keep a record. We don't recommend that you move the alerts from your yellow and red tabs until you have successfully dealt with them.

Using pensionsync to retrieve employee opt-outs

Best practice is that you should retrieve employee opt-outs from Aviva (using pensionsync) prior to starting a new pay run. If you do not do this, your subsequent contributions submission to Aviva may fail (due to including a contribution for a worker who is no longer a member).

Aviva transmit the opt-out information to pensionsync, which is then downloaded directly into your payroll software.

Check your payroll software user guide for instructions on how to retrieve employee opt-outs from your chosen pension provider, using pensionsync.

Submitting contributions each pay period

Sending data to Aviva via pensionsync

1. Complete your payroll as you would normally
2. Follow your payroll software instructions for submitting data to Aviva via pensionsync (ensure you are in the correct tax period)
3. Go into your pensionsync alerts and you will receive an alert on whether the transmission was successful or not.

Checking everything has worked correctly

1. Go to the Alerts in pensionsync.

pensionsync

2. Check the status of your submission
3. Keep checking, alerts can take a few minutes to filter through.
4. If you have an error message it will give you the actual error within the “details” tab and you can amend the error in your payroll before resubmitting.
5. Aviva will email the payroll administrator when the job is done, and if you log into their portal, you will be notified that they have successfully received data.

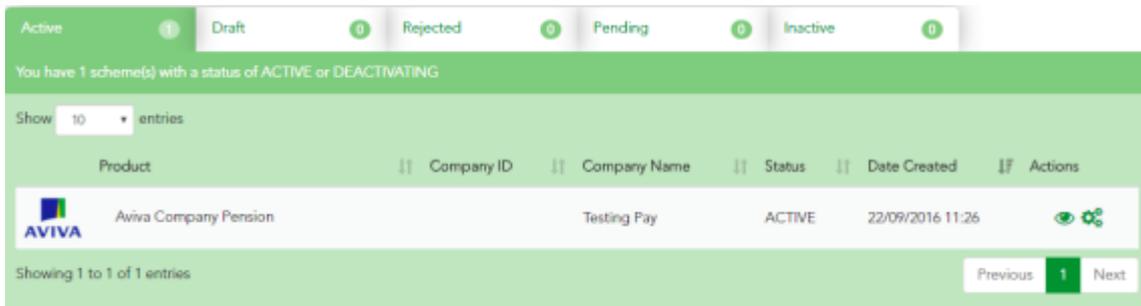
Success: what, if anything, you need to do next?

For Aviva you will not have to do anything further as payments will be automatically collected by Aviva.

Worker Instructions

Worker Instructions deliver changes to workers that may be made at the pension provider

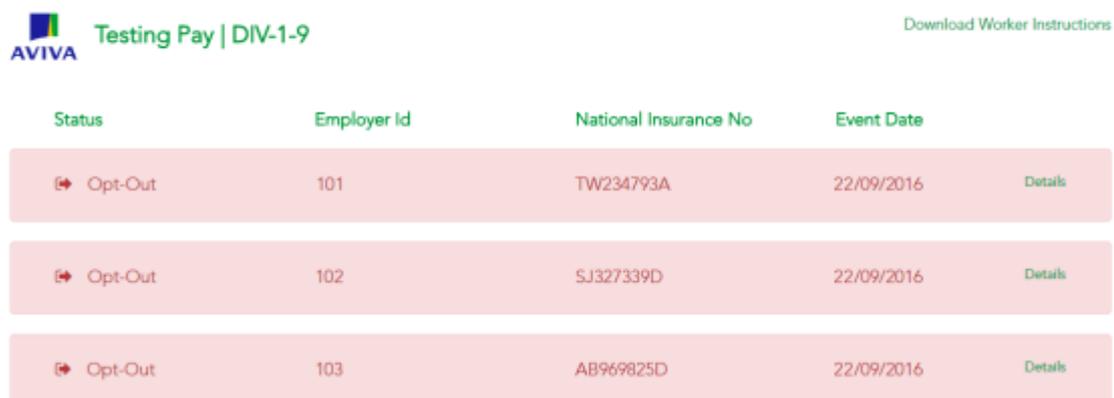
e.g. the worker opts out on the provider website. This will appear as the icon  in your actions within the dashboard.



Product	Company ID	Company Name	Status	Date Created	Actions
 Aviva Company Pension		Testing Pay	ACTIVE	22/09/2016 11:26	 

Clicking on worker instructions will open a separate dashboard;

Worker Instructions



Status	Employer Id	National Insurance No	Event Date	
 Opt-Out	101	TW234793A	22/09/2016	Details
 Opt-Out	102	SJ327339D	22/09/2016	Details
 Opt-Out	103	AB969825D	22/09/2016	Details



Opening details confirms the actions that have taken place and on which date;

Opt-Out	103	AB969825D	22/09/2016	Details
		As Opt-Out Date	22/09/2016	

Where worker instructions are made available by Aviva, pensionsync will retrieve and display them against the associated pension scheme. Worker Instructions can also be retrieved through payroll as well as through pensionsync.

Note that pensionsync only keeps records of worker instructions that are up to 6 weeks old. If you wish to have detailed records of all worker instructions please remember to use the 'Download Worker Instructions' functionality on a periodic basis.

Ensuring the pension scheme in your payroll software is correctly defined

It is extremely important that your payroll software defines the pension scheme in EXACTLY the same way as it is defined in the pension provider's systems. We recommend you make the following checks

1. Contribution frequency - Aviva arrange all contributions in to calendar monthly schedules so it is important your payroll is configured in line with this.
2. Scheme identifiers - Ensure you have entered all applicable identifiers in to your payroll software. Aviva allocate a Scheme Number for the scheme and a Category Number for each category within the scheme.
3. Tax relief - Make sure tax relief is set up correctly for the scheme based on the "payment arrangement". For Aviva, this is always the Relief at Source method (contributions deducted net of basic rate tax relief from after tax pay)

Some payroll software providers that work with pensionsync allow their users to "check" for changes to a pension scheme's set-up using pensionsync technology, to retrieve the pension scheme details into the payroll software. Please check with your payroll software provider to find out if they support this feature.

If you are not sure what the settings within the scheme are, then you can log in to Aviva and view these details in the online portal.



Need help?

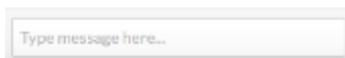
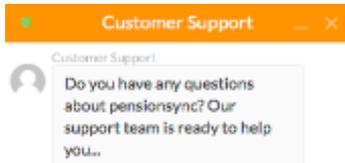
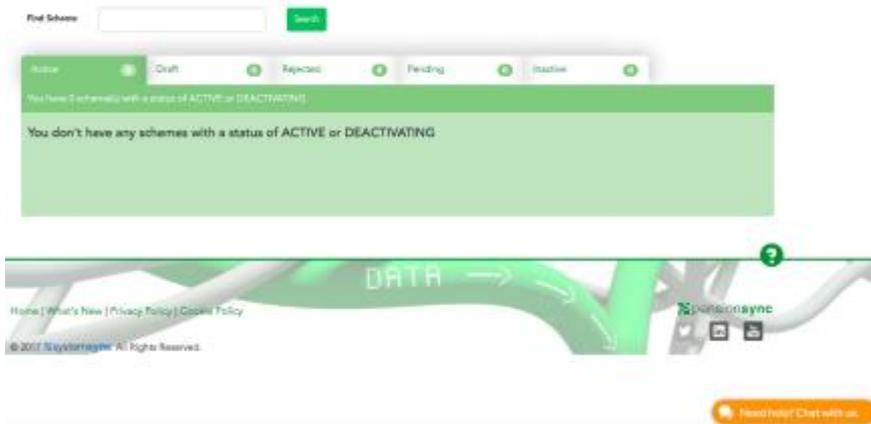
This final section explains how to use our chat support tool within pensionsync. Using Chat is the fastest, and best way, to get support from pensionsync.

Our customer support chat tool can be launched at any time from within the scheme management tool.

Once you have opened the registration page, you have the option to chat to us via the web if you require any assistance while setting up and during the process. Our chat box is always at the bottom right of the page.



Need help? Chat with us.



Simply type your message to start talking to us. One of our support team will come back to you with assistance, we are always happy to help.