



Guide to working with NEST via pensionsync

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Open an account with NEST

You must have opened a NEST Connect account or Employer account with NEST before you can use pensionsync to send data to NEST.

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 our Chat tool



When you open your account, NEST 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”.

If you are an adviser, it will be necessary that your account with NEST has “delegated authority” to access your Client’s NEST pension scheme (if your Client already has a NEST pension scheme). If you do not have delegated authority, then you do not have permission from NEST to upload data to your Clients scheme (either via pensionsync or directly via the NEST online portal).

If your Client does not have an existing scheme with NEST, then you can use your NEST account to apply for a new scheme. Or you can use pensionsync to start the process of applying for a new scheme with NEST.

How to apply for a new pension scheme with NEST

Can I apply for a pension scheme with NEST directly?

Yes, you can. It is possible to open a pension scheme with NEST directly and then use pensionsync to deliver data to that scheme.

How do I configure the NEST pension scheme to work with Calendar Month payroll periods?

If you want to configure your NEST pension scheme to work with Calendar Month payroll periods, then it is important to follow these instructions

1. Start your NEST pension scheme application (within the NEST portal)
2. When you come to add a Worker Group choose “Monthly” as your “Payment Frequency”
3. You will then be asked “When is your current earnings period due to end?” You must select “31st” from the drop-down list even if the current month does not end on the 31st.
 - NEST will interpret the selection of the 31st to mean “use Calendar months” as the payment frequency

If you, or your Client, has successfully applied for a NEST scheme but during the application did not select the 31st as the end date of the current earnings period then your NEST scheme is NOT configured to use “Calendar months” as the “Payment Frequency”.

To rectify this situation, it will be necessary for you to create a new Worker Group (making sure to select the 31st as your earnings period end date), migrate all workers from the existing Worker Group into the new Worker Group and then use this new Worker Group in all subsequent submissions to NEST. We recommend you contact NEST customer support if you wish to make this change.

2 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 our Chat tool



Understanding how to apply for a new NEST pension scheme via pensionsync

You have the option of starting the application for a NEST pension scheme from within pensionsync. However, the NEST pension scheme application cannot be 100% completed from within pensionsync: You must apply to NEST for your user account first, and it remains necessary to use the NEST online portal to complete the scheme application (because Employer Direct Debit authorisation can only be completed in the NEST online portal).

This section explains how to go about using pensionsync to apply for a NEST scheme. The process breaks down into 2 sections, which normally takes less than 10 minutes to complete (per NEST application).

1. One time set-up activities to complete before you apply for your 1st NEST scheme.
2. A seven-step process which needs to be undertaken for every application for a NEST scheme

One time set-up activities to complete before you apply for your 1st NEST scheme

We recommend that before you apply for your first NEST scheme that you:

1. **Complete your Payroll Administrator Template**
This is the page in your Account Overview area by the same name. Completing this information will mean you do not have to re-key it every time you apply for a new scheme.
2. **Upload your company logo to pensionsync.**
Your company logo will be used when we present a summary of the L&G scheme application to your Employer Client. This helps reassure your Employer Client that the scheme application process is being managed by a trusted supplier (e.g. your company) which is already known to them.

How to upload your company logo

- Your company logo should be either a JPG or a PNG. We don't restrict the size of the image, but we recommend it should be no wider than 400 pixels and not larger than 1MB.

Start your application for a new NEST scheme

Under the main function menu at the top right of the page, there is an option for "New Scheme".

When you choose this function, you can choose the pension scheme that your client has chosen to use. You must first check the “Acknowledgement” box to confirm that you have understood the following:

- (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](#).

You can click on the [Privacy Policy](#) (highlighted in green) to read and save this.

Until you check the acknowledgement, you cannot choose a scheme so these will be greyed out until the this has been done.

Once you have checked the acknowledgment box, you will be able to proceed choosing the scheme.

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](#).



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.

By clicking on the “Learn More” links beneath the scheme’s you can visit the provider’s website.

Note: Data you will require in order to set up a scheme, is as follows:

- Employer’s Staging Date
- Number of Employees

4 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

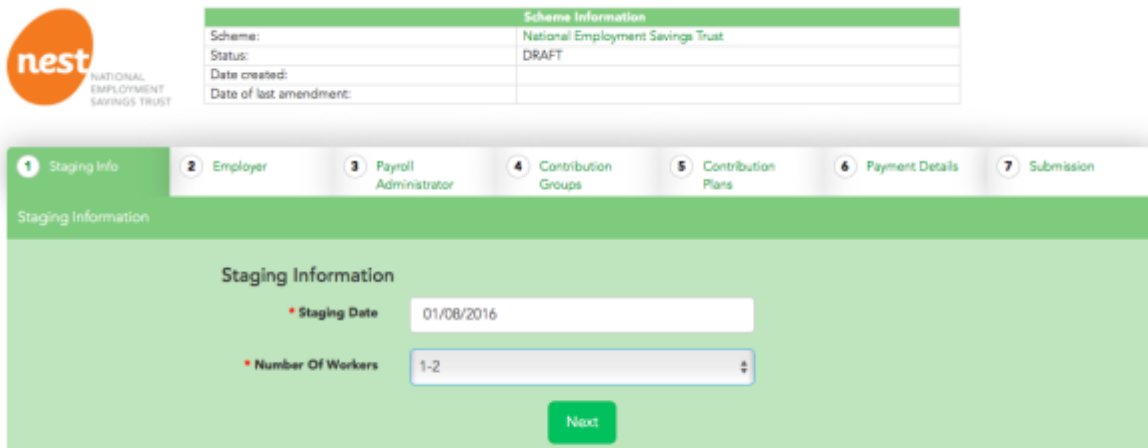
pensionsync

- Employer's Name
- Employer's Email
- Employer's Date of Birth (non-mandatory)
- Employer's Mobile telephone number
- Employer's PAYE Reference
- Employer's Address
- Scheme Administrator (If bureau not managing)
- Contribution Frequency
- Earnings Period Date
- Contribution Plan (i.e. qualifying minimum)
- Your NEST log in credentials

Clicking on the NEST icon will open the NEST scheme application form.

Step 1: Enter the Staging Date information

Add the staging date and number of employees and “next” to move to the next tab



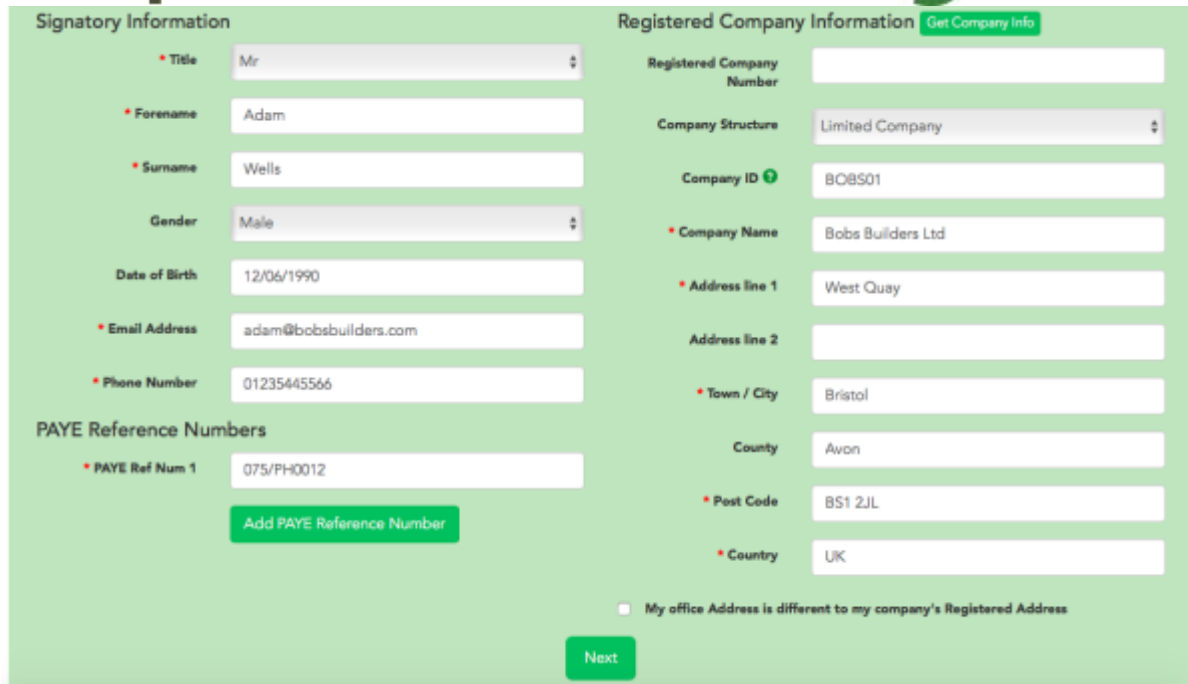
The screenshot shows the NEST scheme application form. At the top left is the NEST logo (National Employment Savings Trust). To its right is a table titled "Scheme Information" with the following data:

Scheme Information	
Scheme:	National Employment Savings Trust
Status:	DRAFT
Date created:	
Date of last amendment:	

Below the table is a navigation bar with seven tabs: 1 Staging Info, 2 Employer, 3 Payroll Administrator, 4 Contribution Groups, 5 Contribution Plans, 6 Payment Details, and 7 Submission. The "Staging Info" tab is selected and highlighted in green. Below the navigation bar is the "Staging Information" form. It contains two fields: "Staging Date" with the value "01/08/2016" and "Number Of Workers" with the value "1-2". Both fields have a red asterisk next to their labels, indicating they are mandatory. A green "Next" button is located below the "Number Of Workers" field.

Step 2: Enter the Employer information

Use this page to enter the details of the Scheme Owner – the Employer.
Each data item marked with a red asterisk is MANDATORY.



The screenshot shows a registration form with three main sections:

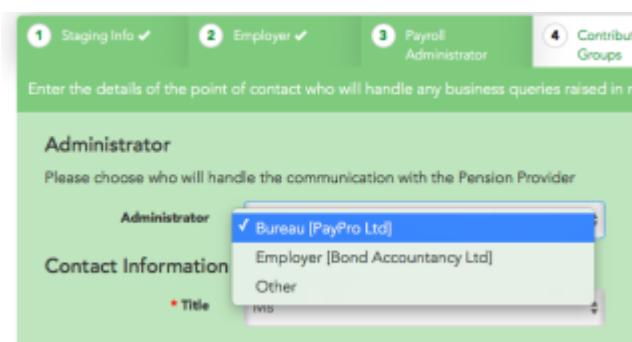
- Signatory Information:** Fields for Title (Mr), Forename (Adam), Surname (Wells), Gender (Male), Date of Birth (12/06/1990), Email Address (adam@bobsbuilders.com), and Phone Number (01235445566).
- Registered Company Information:** Fields for Registered Company Number, Company Structure (Limited Company), Company ID (BOBS01), Company Name (Bobs Builders Ltd), Address line 1 (West Quay), Address line 2, Town / City (Bristol), County (Avon), Post Code (BS1 2JL), and Country (UK). A "Get Company Info" link is present.
- PAYE Reference Numbers:** A field for PAYE Ref Num 1 (075/PH0012) and an "Add PAYE Reference Number" button.

At the bottom, there is a checkbox for "My office Address is different to my company's Registered Address" and a "Next" button.

If they have more than one PAYE scheme, you can add another using the “Add PAYE Reference Number” link.

Step 3: Enter the Payroll Administrator information

Use this screen to enter in the contact information of the organisation which is “administering” the pension scheme. This could be the Employer. But typically, it’s the Payroll Bureau or Accountant (who is operating pensionsync).



The screenshot shows the "Payroll Administrator" step in a four-step process. The steps are: 1 Staging Info, 2 Employer, 3 Payroll Administrator, and 4 Contributor Groups. The current step is "Payroll Administrator", which asks to "Enter the details of the point of contact who will handle any business queries raised in relation to the pension scheme".

The form includes an "Administrator" section with a dropdown menu. The dropdown is open, showing options: "Bureau [PayPro Ltd]" (selected), "Employer [Bond Accountancy Ltd]", and "Other". Below this is a "Contact Information" section with a "Title" field.

If the Payroll Bureau will be administering the scheme then pensionsync can copy in the data from the “Payroll Administrator Template” in management of your account, using the “Administrator” drop down box.

1 Staging Info ✓ 2 Employer ✓ 3 Payroll Administrator 4 Contribution Groups 5 Contribution Plans 6 Payment Details 7 Submission

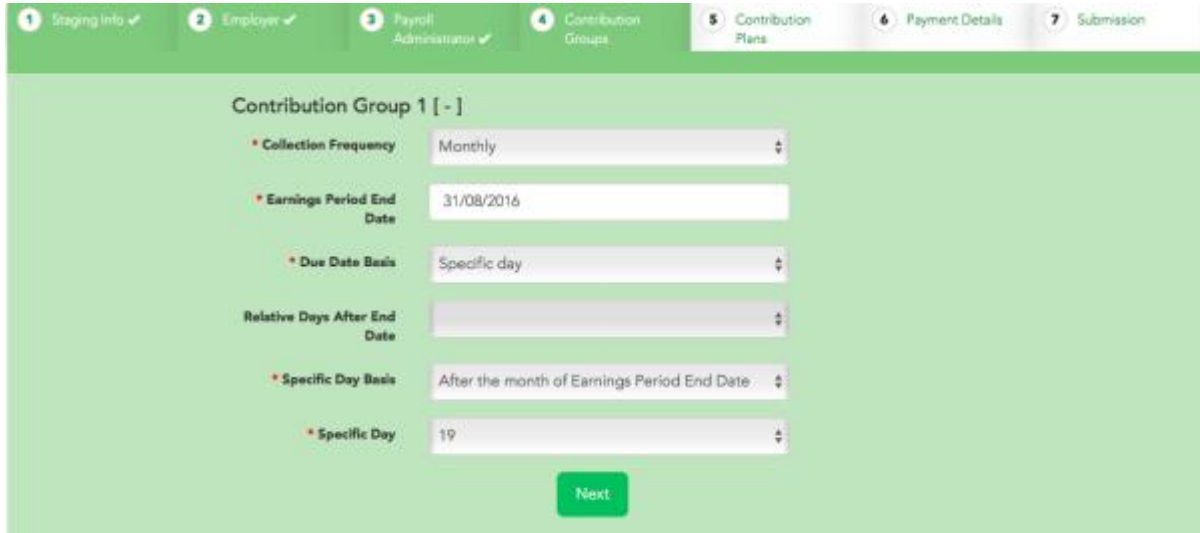
Enter the details of the point of contact who will handle any business queries raised in regards to the Legal & General Worksave Pension Plan

Administrator	Registered Company Information
<p>Please choose who will handle the communication with the Pension Provider</p> <p>Administrator Bureau [PayPro Ltd]</p>	<p>Registered Company Number</p>
<p>Contact Information</p> <p>Title Ms</p> <p>Forename Jenny</p> <p>Surname Jackson</p> <p>Gender Female</p> <p>Date of Birth 16/12/1990</p> <p>Email Address jenny@paypro.com</p> <p>Phone Number 01793444555</p>	<p>Company Name PayPro Ltd</p> <p>Address line 1 Wiltshire Business Park</p> <p>Address line 2</p> <p>Town / City Swindon</p> <p>County Wiltshire</p> <p>Post Code SN3 4JJ</p> <p><input type="checkbox"/> My office Address is different to my company's Registered Address</p>

If the employer will be responsible for administration, then select “Employer” from the “Administrator” drop down box. pensionsync will the copy in the Employers contact information into this page.

If another organisation will be the Pension Scheme Administrator, then select “Other” and enter their contact information.

Step 4: Define the Contribution Groups

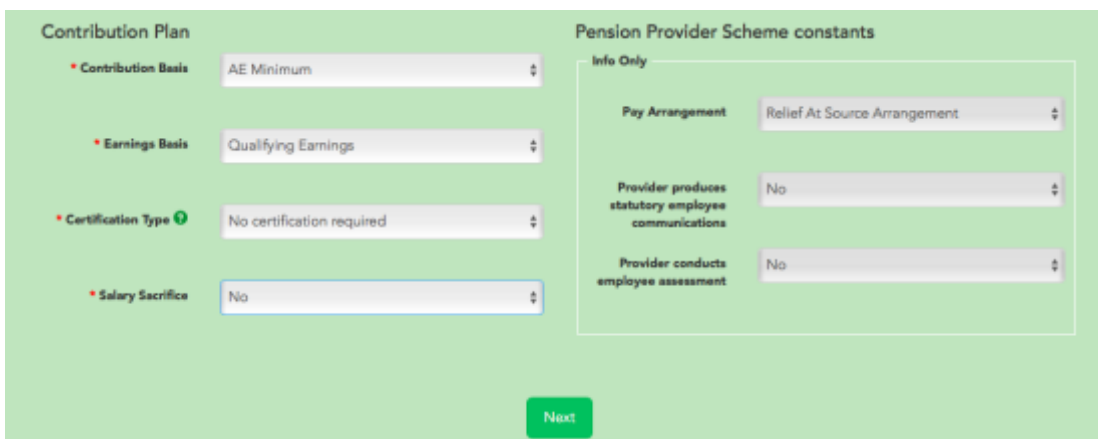


Please note that if your collection frequency is not based on tax weeks or months, when entering “Earnings Period End Date” this does not relate to your staging month. You must enter the next period end date that falls within the next 30 days;

For example, you are staging on 1st November, and your pay period ends on the last working day, you would not enter 30th November, but your next available period end date so if you are setting the scheme up on 4th July, you would enter 31st July.

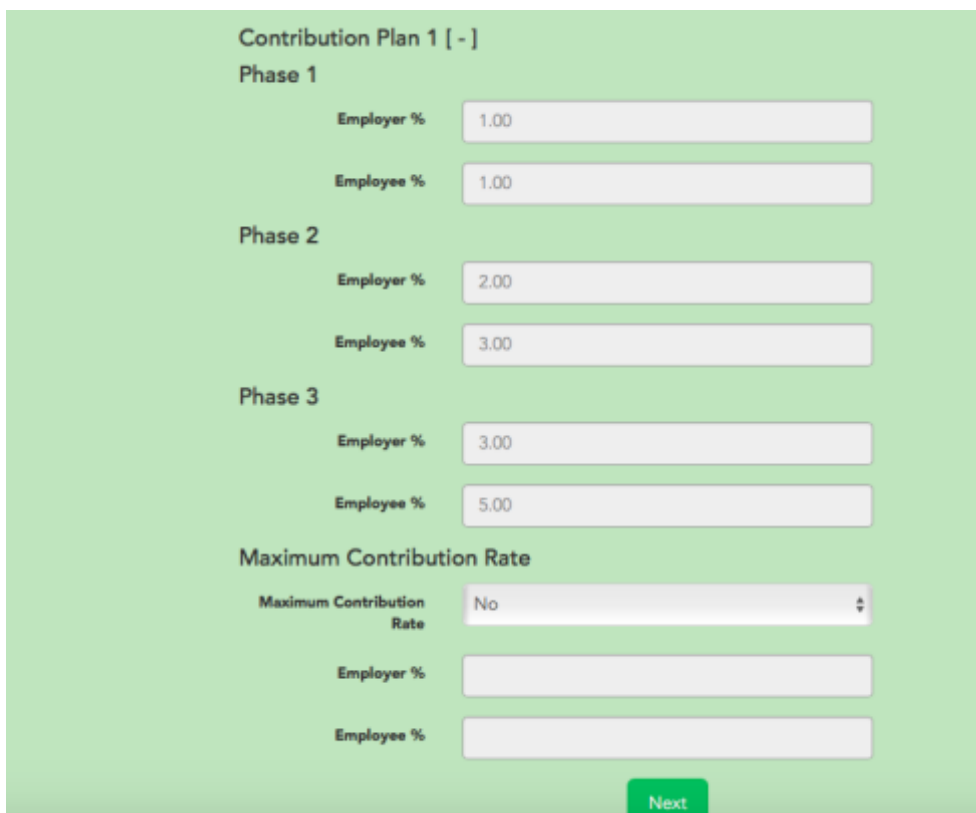
Step 5: Define the Contribution Plans

Contribution plans currently default to minimum automatic enrolment requirements.



If you would like to set up a scheme using other preferences, the fields have drop down boxes where you can set the required preferences for your scheme. It is important to discuss and agree with the Employer which contributions and earnings basis they want their pension scheme configured with as when contributions are submitted to NEST they check that the contributions are at least these minimum percentages.

Once you have clicked on “Next” another screen is displayed under Contribution Plan with regard to phased contributions. These are pre-set as per the legislation. You can add a maximum contribution here if required.



The screenshot shows a form titled "Contribution Plan 1 [-]" with the following fields:

- Phase 1**
 - Employer %: 1.00
 - Employee %: 1.00
- Phase 2**
 - Employer %: 2.00
 - Employee %: 3.00
- Phase 3**
 - Employer %: 3.00
 - Employee %: 5.00
- Maximum Contribution Rate**
 - Maximum Contribution Rate: No (dropdown menu)
 - Employer %: (empty text box)
 - Employee %: (empty text box)

A green "Next" button is located at the bottom right of the form.

Step 6: Enter the Employer’s Payment Details

With NEST, an Employer’s payment details can only be set up within the NEST portal after the scheme has been submitted via pensionsync. However, you can use pensionsync to tell NEST whether or not they are approved to automatically collect the payment from the Employer (once the scheme is set-up & contribution data is regularly being submitted).

pensionsync

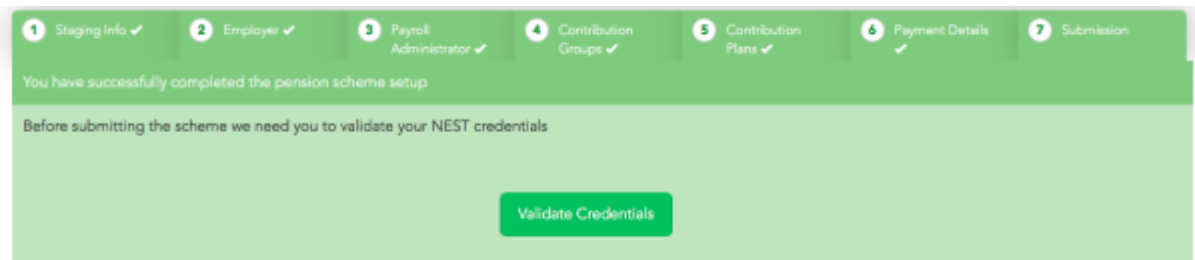


If “Payment Approval” is saved as “Approve” within provider preferences, then NEST will automatically collect the payment from the Employer once contribution data has been successfully submitted.

If “Payment Approval” is saved as “Reject” then NEST will NOT automatically collect the payment from the Employer. This means that you or employer will need to log into the NEST portal after each pay period and manually approve the payments.

pensionsync recommends that you agree in advance with your clients whether or not they are comfortable with NEST automatically making payment deductions. It is possible to set “Payment Approval” to Reject initially, then return and set it to “Approve” at a later stage.

Step 7: Submit the Scheme application to NEST



Once you have saved the ‘payment instructions’ then pensionsync can submit the scheme application to NEST. To do this pensionsync will ask you to validate your credentials for the NEST scheme. We need a valid NEST username and password in order to submit the scheme application in association with your NEST account. Your NEST username and password is assigned to you by NEST when register with NEST on their website (NEST connect).

Note: we recommend you do not enter your Client’s NEST username and password (if they have one). Instead you should enter your own organisation’s NEST username and password. If you do use your own organisations NEST username and password, then please make sure you have “delegated authority” from NEST to submit contribution data for your Client’s NEST scheme.

pensionsync

Validating credentials here will launch in a new web browser. We recommend you ensure your browser is set to allow “pop-up windows” (otherwise your browser may block the creation of a new web browser window).

You must add your NEST credentials here to validate the scheme,




Please enter your NEST credentials to enable your Payroll Software to automatically submit data to your NEST account

Username

Password

Save and validate

[Help](#) | Secure data transfer enabled by  pensionsync

Once you have entered your details, save and validate. You should then receive the following confirmation.

Thank you. Your Payroll Software is approved to send data to NEST.
You can now close this window.

Your scheme is now ready for submission.



Scheme Information	
Scheme:	National Employment Savings Trust
Status:	READY-TO-SUBMIT
Date created:	6/24/2016 1:37:39 PM
Date of last amendment:	6/24/2016 1:37:39 PM

1 Staging Info ✓ 2 Employer ✓ 3 Payroll Administrator ✓ 4 Contribution Groups ✓ 5 Contribution Plans ✓ 6 Payment Details ✓ 7 Submission

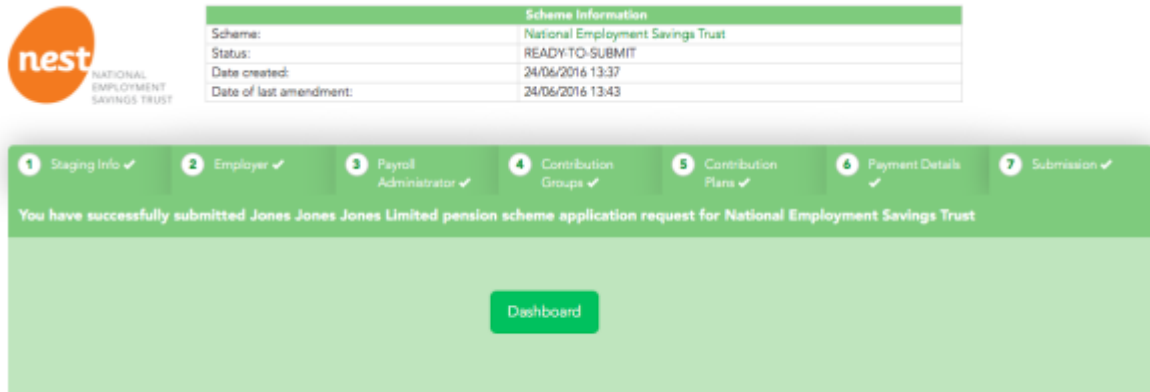
You have successfully completed the pension scheme setup

Submit scheme application request for the National Employment Savings Trust

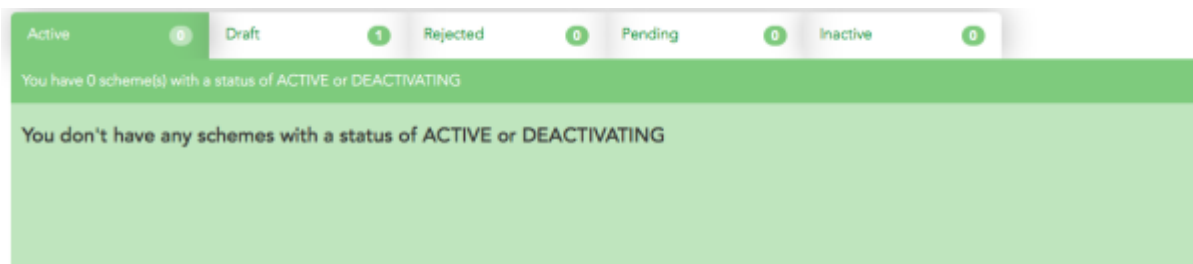
11 The fastest way to ask for support from the pensionsync team is via online chat, which you can access from within pensionsync. Please refer to the last section in this document on how to use our Chat tool

pensionsync

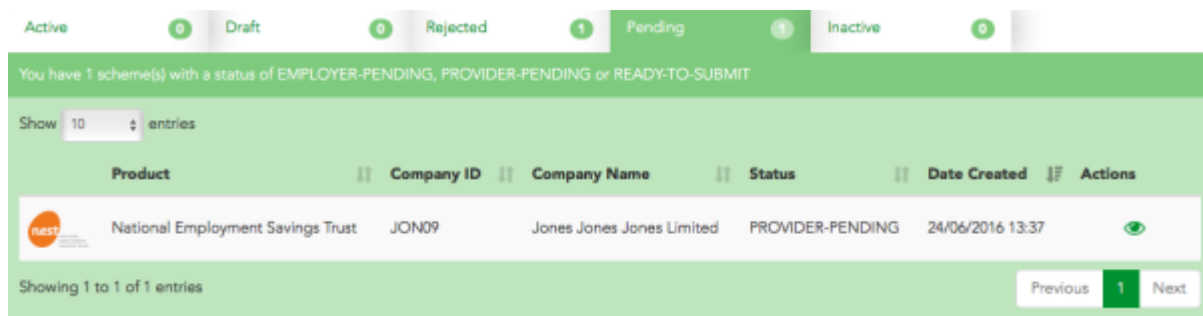
Your scheme has been submitted and will be sat in “Pending” within your dashboard.




By going to your Dashboard, in the menu functions on the top right of the page, you can see all your schemes and their status.



The scheme that has just been set up will be sat in “Pending” section as it will need to be accepted by NEST and the employer will need to set up payment details on the NEST portal. We recommend you notify the Employer (your Client) that you have applied for a NEST pension scheme on their behalf. NEST will also email the Employer using the email address you provided in Step 2: Enter Employer information.

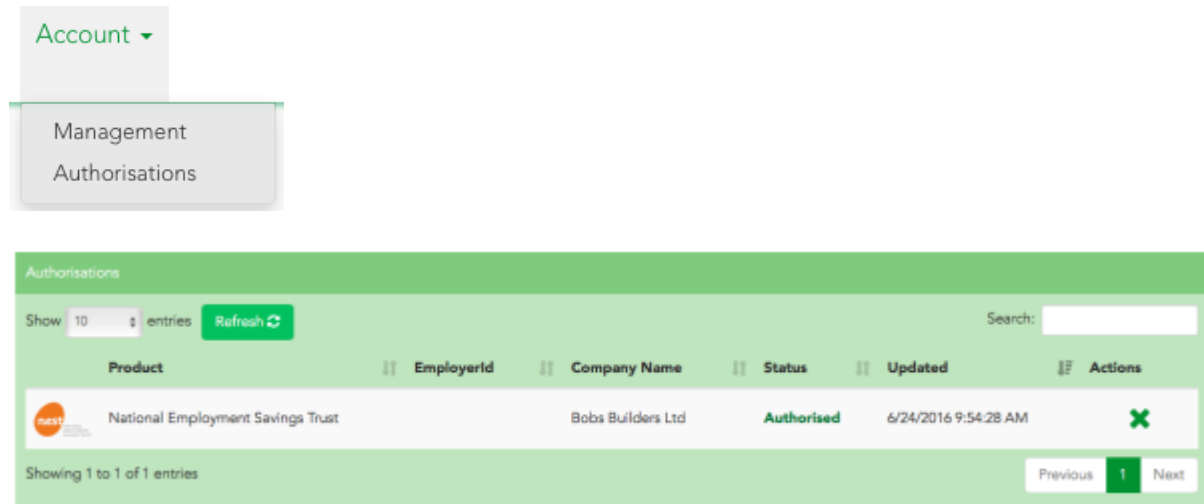


Once NEST has received the Employer’s bank details, then NEST will approve the new scheme & will appear in the “Active” section of the Dashboard.



You can view the scheme using the  icon.

pensionsync

Because NEST uses credentials for the scheme, these will sit in the pensionsync system under “Authorisations” in the main function menu at the top right of the page.



The screenshot shows the 'Account' dropdown menu with 'Management' and 'Authorisations' options. Below is a screenshot of the 'Authorisations' table with one entry for 'National Employment Savings Trust' with status 'Authorised'.

Product	Employerid	Company Name	Status	Updated	Actions
 National Employment Savings Trust		Bobs Builders Ltd	Authorised	6/24/2016 9:54:28 AM	

Because you have logged in with your NEST credentials at the end of the scheme application process, the new NEST pension scheme is displayed with a status of “authorised”. This means everything is in order and pensionsync is authorised to automatically submit data to the scheme.

If for any reason you would like to cancel the pensionsync authorisation, then hit the green “X”.

Working with an existing NEST pension scheme

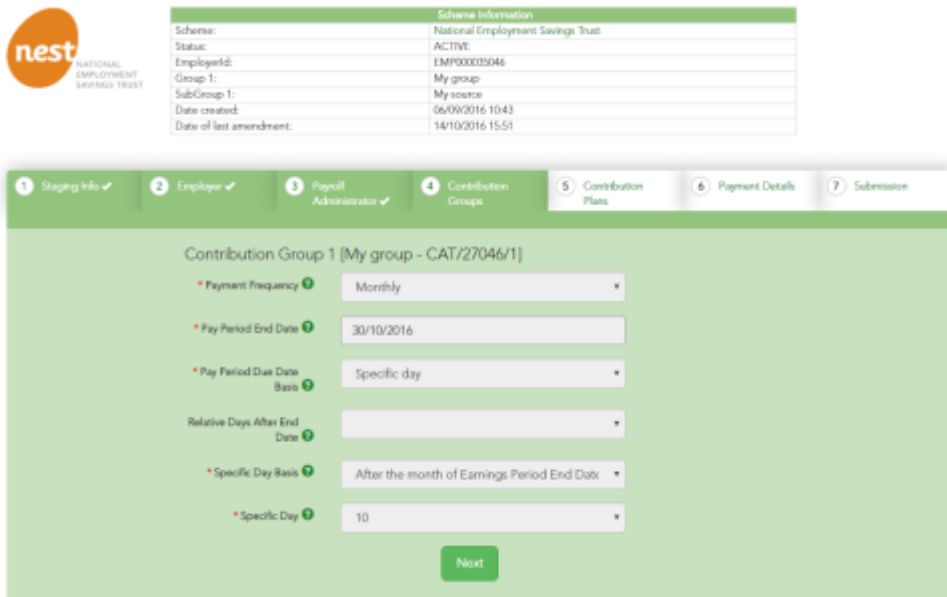
You can send data to an existing NEST scheme however you must link the existing scheme with pensionsync first by completing the following steps:

1. Configure Your Payroll Software. This only needs to be completed once. You may need to change the settings within your payroll software to configure the NEST scheme, to ensure that data can be exported to pensionsync. **Please note that authorisation of the NEST 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

13 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 our Chat tool

2. Complete your payroll as normal for that pay period. You can then attempt submitting data to us. If you 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.

When submitting an existing scheme to NEST, you must use the specific Pay Period End Date to select the start of the new earnings period, and this can be found in the scheme details within pensionsync, under contribution groups or within the NEST portal.



The screenshot displays the pensionsync interface. At the top left is the NEST logo (National Employment Savings Trust). To its right is a table titled 'Scheme Information' with the following data:

Scheme Information	
Schema:	National Employment Savings Trust
Status:	ACTIVE
EmployerID:	EMP00002046
Group 1:	My group
SubGroup 1:	My source
Date created:	06/09/2016 10:43
Date of last amendment:	14/10/2016 15:51

Below the table is a navigation bar with seven steps: 1 Staging Info, 2 Employee, 3 Payroll Administrator, 4 Contribution Groups, 5 Contribution Plans, 6 Payment Details, and 7 Submission. The 'Contribution Groups' step is active. The main content area shows 'Contribution Group 1 [My group - CAT/27046/1]' with the following fields:

- * Payment Frequency: Monthly
- * Pay Period End Date: 30/10/2016
- * Pay Period Due Date Basis: Specific day
- Relative Days After End Date: [empty]
- * Specific Day Basis: After the month of Earnings Period End Date
- * Specific Day: 10

A green 'Next' button is located at the bottom of the form.

Using pensionsync to manage opt-outs

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

NEST transmit the opt-out information to pensionsync, which can then be 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.

If a submission file includes a contribution for a worker that has already been notified as having opted out either by the payroll or the pension provider with NEST, the file will go through and NEST will error the specific opt out record in the submission and accept any valid record in the same submission

Submitting contributions each pay period

Sending data via pensionsync

1. Complete your payroll as you would normally
2. Follow your payroll software instructions for submitting data to NEST 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.
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. NEST will email the payroll administrator when the job is done

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

For NEST schemes, you **must** log into the NEST portal and approve NEST to collect the payment from the Employer (after you have successfully submitted data to NEST via pensionsync) **if** you have not configured the NEST pension scheme to automatically process Employer payments.

It is possible to use pensionsync to "automatically trigger" the collection of the Employer payment by NEST. Please see the next section for instructions on how to do this.

Configuring NEST for Automatic Payment Approval

Please note: If you do not have an explicit agreement or understanding with your clients to authorise the NEST contribution payments, then you should always default the Automatic Contribution Payment Approval value for a NEST scheme in pensionsync to "Reject". This will mean that either you or the Employer must go into the NEST portal each pay run and

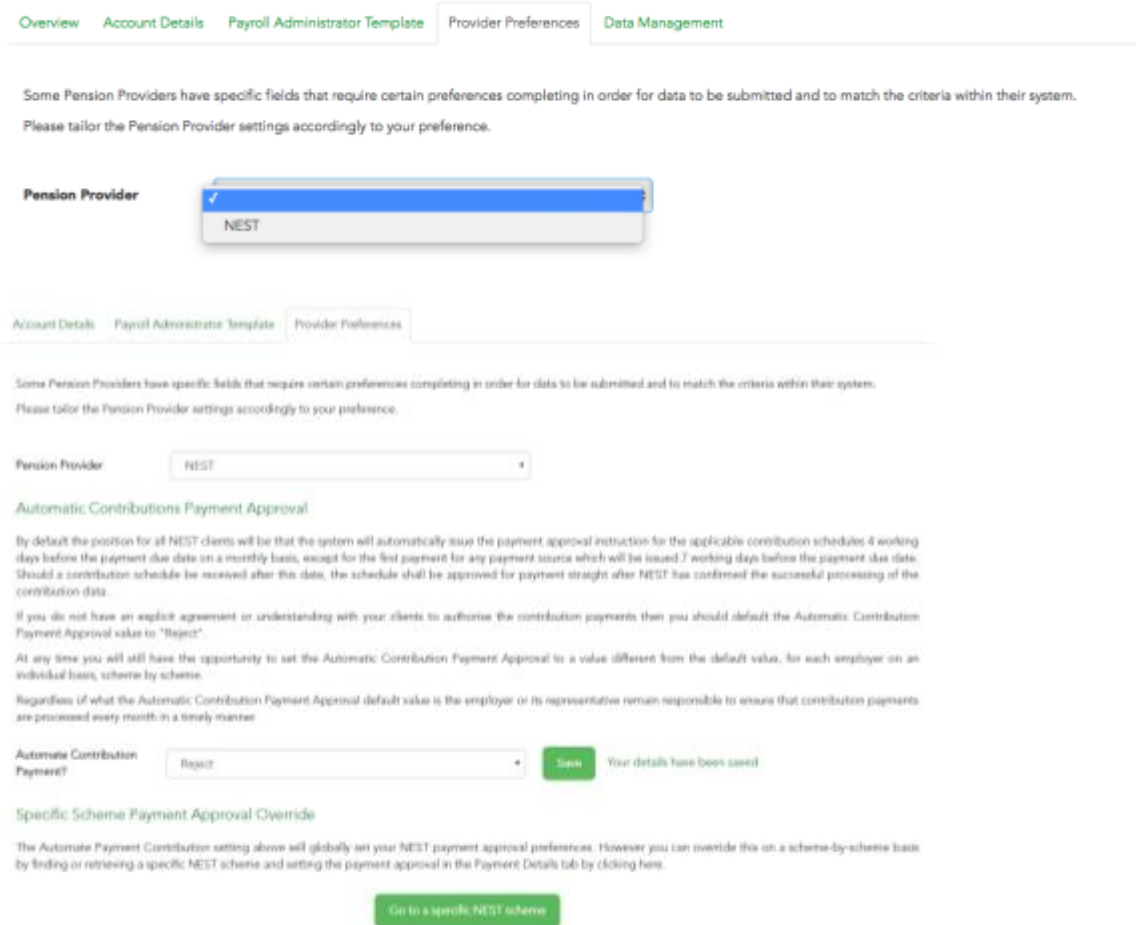
manually approve NEST to collect the payment.

pensionsync allows you to define a default setting for ‘payment approval’ and also to define a scheme specific setting for ‘payment approval’.

The default setting

The default setting for all your NEST schemes is set in the “Provider Preferences” section accessed via “Account > Management” in the main menu. pensionsync will automatically set the default setting to “Approve”.

Payroll Test Ltd | DM1825021 | Free



Overview Account Details Payroll Administrator Template **Provider Preferences** Data Management

Some Pension Providers have specific fields that require certain preferences completing in order for data to be submitted and to match the criteria within their system. Please tailor the Pension Provider settings accordingly to your preference.

Pension Provider

Account Details Payroll Administrator Template **Provider Preferences**

Some Pension Providers have specific fields that require certain preferences completing in order for data to be submitted and to match the criteria within their system. Please tailor the Pension Provider settings accordingly to your preference.

Pension Provider

Automatic Contributions Payment Approval

By default the position for all NEST claims will be that the system will automatically issue the payment approval instruction for the applicable contribution schedules 4 working days before the payment due date on a monthly basis, except for the first payment for any payment source which will be issued 7 working days before the payment due date. Should a contribution schedule be received after this date, the schedule shall be approved for payment straight after NEST has confirmed the successful processing of the contribution data.

If you do not have an explicit agreement or understanding with your clients to authorise the contribution payments then you should default the Automatic Contribution Payment Approval value to "Reject".

At any time you will still have the opportunity to set the Automatic Contribution Payment Approval to a value different from the default value, for each employer on an individual basis, scheme by scheme.

Regardless of what the Automatic Contribution Payment Approval default value is the employer or its representative remain responsible to ensure that contribution payments are processed every month in a timely manner.

Automatic Contribution Payment? Your details have been saved


Specific Scheme Payment Approval Override

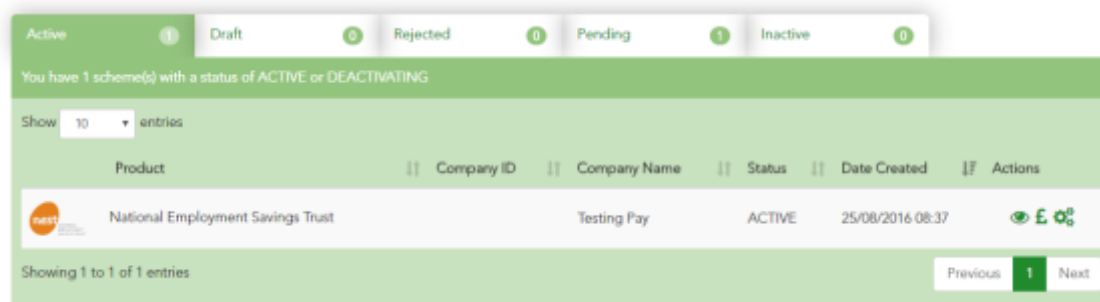
The Automatic Payment Contribution setting above will globally set your NEST payment approval preferences. However you can override this on a scheme-by-scheme basis by finding or retrieving a specific NEST scheme and setting the payment approval in the Payment Details tab by clicking [here](#).





All NEST schemes being processed by pensionsync will either automatically trigger payment collection by NEST, or not, depending on the setting of this field.

At any time, you will still can set the Automatic Contribution Payment Approval to a value different from the default value, for each employer on an individual basis, scheme by scheme. You can do this by locating the NEST scheme in pensionsync and proceeding directly to Section 6: Payment details, where you can change the setting for that scheme.

Worker Instructions

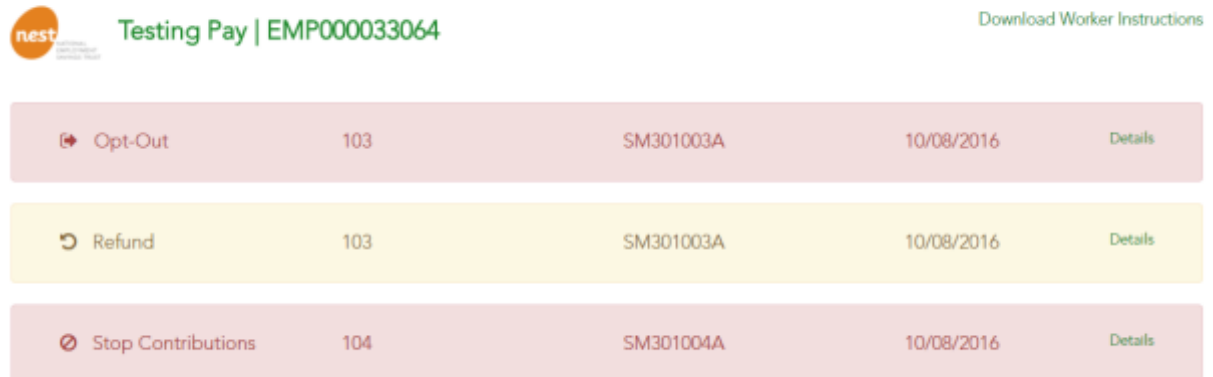
Worker Instructions deliver changes to workers that may be made at the pension provider e.g. the worker opts out on the provider website or they may be able to update their contribution rates on the provider site. This will appear as the icon  in your actions within the dashboard.






Product	Company ID	Company Name	Status	Date Created	Actions
 National Employment Savings Trust		Testing Pay	ACTIVE	25/08/2016 08:37	  

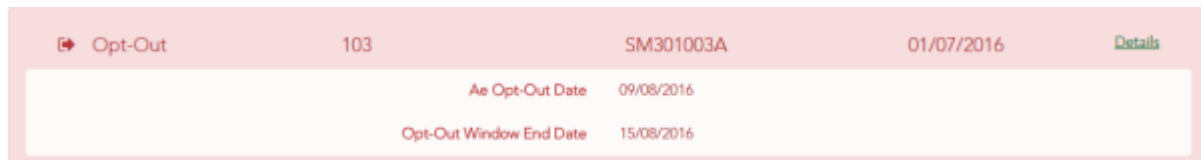
Clicking on worker instructions open a separate dashboard;


Worker Instructions



Action	Count	Company ID	Date	Details
 Opt-Out	103	SM301003A	10/08/2016	Details
 Refund	103	SM301003A	10/08/2016	Details
 Stop Contributions	104	SM301004A	10/08/2016	Details

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



Action	Count	Company ID	Date	Details
 Opt-Out	103	SM301003A	01/07/2016	Details
As Opt-Out Date 09/08/2016				
Opt-Out Window End Date 15/08/2016				

Where worker instructions are made available by NEST, pensionsync will retrieve and display them against the associated pension scheme.



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. Make sure the PRPs (Pay Reference Periods) are identical i.e. calendar month or tax periods. If PRPs differ between payroll & pension systems, then your data file will fail.
2. Make sure Worker Groups are identical, the names of the groups must be a perfect match (e.g. case sensitive).
3. Make sure the Payment Sources are identical, the names of the Payment Source must be a perfect match (e.g. case sensitive).
4. Make sure the "payment arrangement" is identical. E.g. "Relief at source" for NEST.

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.

PRPs cannot be edited once a scheme has been created, but new "Groups" can be added later if required. A process may be required to move members to a new group if the original PRP is wrong - so it's best to double check and get it right first time.

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

Need help?

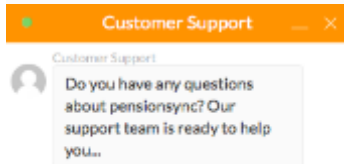
This final section explains how to use our chat support tool within pensionsync. Using Chat is the fastest, and best way, to get support from pensionsync.

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.