



Guide to working with NOW: Pensions via pensionsync

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Open an account with NOW: Pensions

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

When you open your account NOW: Pensions 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”.

It is necessary that your account with NOW: Pensions has the status of “primary administrator” for your Client’s NOW: Pensions pension scheme (if your Client already has a NOW: Pensions pension scheme). If your client has not designated you as their primary administrator then you do not have permission from NOW: Pensions to upload data to your Clients scheme (either via pensionsync or directly via the NOW: Pensions online portal).

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

How to apply for a new pension scheme with NOW: Pensions

Can I apply for a NOW: Pensions scheme within pensionsync?

It is only possible to open a pension scheme with NOW: Pensions directly. Once you have opened a NOW: Pensions scheme (for yourself or for your Employer) then you can use pensionsync to submit data to that scheme.

Note, here is the data you will require in order to set up a NOW: Pensions scheme:

- Choice of contribution model (this includes the employer and employee contribution rates)
- Employer’s Name
- Employer’s Company Registration Number
- Employer’s legal and organisational set-up (e.g. holding or subsidiary)
- Employer’s PAYE Reference
- Employer’s Staging Date
- Whether you want the scheme to start ahead of the staging date
- Estimation of the number of Employees to be included in the scheme
- Primary contact details
- Payroll provider or bureau contact details (so NOW: Pensions can send them the relevant scheme set-up instructions)



- Indication of who will handle communications (NOW: Pensions or Payroll)
- Centrally controlled business email address for statutory employee communications (this will be used by NOW: Pensions to send PDF versions of statutory communications to employees with no email address)
- Worker Group (aka NOW: Pensions 'Payroll') details: name and payroll frequency
- Employer's Bank account details to set up Direct Debit mandates

Working with an existing NOW: Pensions

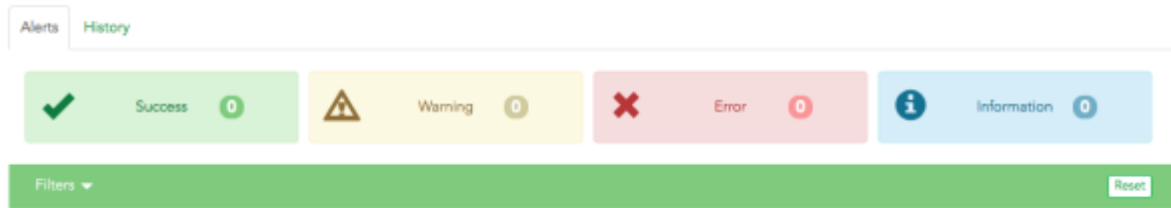
You are able to send data to an existing NOW: Pensions scheme via pensionsync, however you must link the existing scheme with pensionsync first by completing the following steps:

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 the NOW: Pensions scheme, via pensionsync. **Please note that authorisation of the NOW: Pensions 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. 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.

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.

pensionsync



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

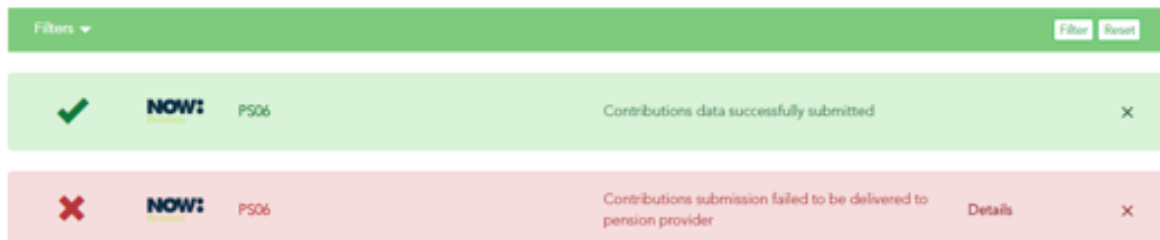
If you have submitted data, and it requires further actions, you will receive an alert in the yellow “Warning” tab.

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

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).

Information will hold any custom messages that apply to your schemes and submissions that we may apply.



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.

Worker Instructions: Using pensionsync to retrieve employee opt-outs and other notifications

Best practice is that you should retrieve employee changes notifications from NOW: Pensions (using pensionsync) prior to starting a new pay run. If you do not do this, your


pensionsync

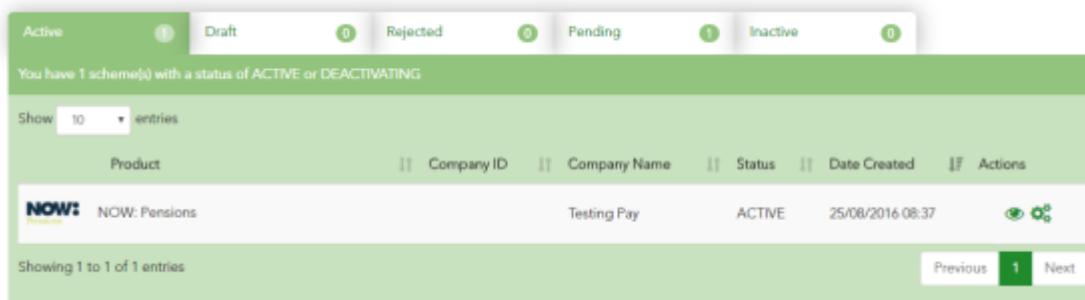
subsequent contributions submission to NOW: Pensions may fail (e.g. due to including a contribution for a worker who is no longer a member).



NOW: Pensions transmit three types of employee notifications to pensionsync. The three types of notification are:

- Opt-outs
- Opt-ins
- Additional Voluntary Contributions Percent

Your payroll software may allow you to import these notifications directly from pensionsync. Check your payroll software user guide for instructions on how to retrieve these employee notifications from your chosen pension provider, using pensionsync.

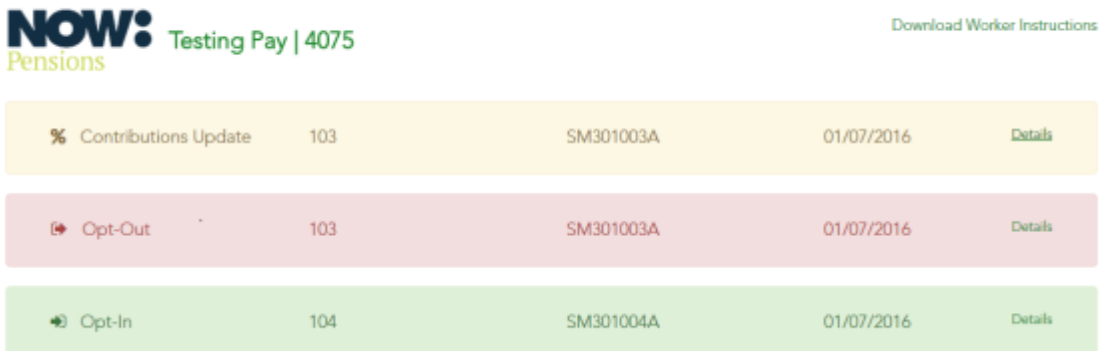
Worker Instructions can also be accessed in the pensionsync Worker Instructions dashboard. This will appear as the icon  in your actions within the dashboard.






Product	Company ID	Company Name	Status	Date Created	Actions
NOW: Pensions		Testing Pay	ACTIVE	25/08/2016 08:37	 

Clicking on worker instructions will open a separate dashboard;

Worker Instructions



Icon	Description	Count	Company ID	Date	Details
	Contributions Update	103	SM301003A	01/07/2016	Details
	Opt-Out	103	SM301003A	01/07/2016	Details
	Opt-In	104	SM301004A	01/07/2016	Details

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

Opt-Out	103	SM301003A	01/07/2016	Details
		As Opt-Out Date	09/08/2016	

Where worker instructions are made available by NOW: Pensions, 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.

Submitting contributions each pay period

Sending data to NOW: Pensions via pensionsync

1. Complete your payroll as you would normally
2. Follow your payroll software instructions for submitting data to NOW: Pensions 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. NOW: Pensions will email the payroll administrator once the submission has been processed, or if a 'matching query' was issued that needs resolving in their Portal before the submission can be fully processed. If you log into their portal, you will be notified of the matching query to resolve, and you will be guided on how to resolve it. If you decide to reject your submission because of inaccurate information, you will need to apply the required corrections in your payroll software and issue the submission again.
6. If you log into the NOW: Pensions Portal, you will always find the status of your latest submission, whether it succeeded or failed.

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

For NOW: Pensions you don't need to do anything else, as NOW: Pensions will automatically collect payments from the Employer at the right time.





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 e.g. calendar month or tax periods. If PRPs differ between payroll & pension systems, then your data file will fail.
2. Make sure Worker Groups (referred to as 'Payrolls' by NOW: Pensions) are identical: the names and codes of the groups must be a perfect match (e.g. case sensitive) between your payroll software and NOW: Pensions.
3. Make sure the "payment arrangement" is identical. E.g. "Net pay arrangement" for NOW: Pensions.

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 at a later date 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 NOW: Pensions 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.

8 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



Need help? Chat with us.

 pensionsync

Dashboard New Scheme Alerts Account

Find Scheme

Search

Active Draft Rejected Pending Inactive

You have 0 schemes with a status of ACTIVE or DEACTIVATING

You don't have any schemes with a status of ACTIVE or DEACTIVATING



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Need help? Chat with us.

Customer Support

Customer Support



Do you have any questions about pensionsync? Our support team is ready to help YOU...

Type message here...