



# Guide to working with The People's Pension via pensionsync

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## Open an account with The People's Pension

You must have opened an account with The People's Pension before you can use pensionsync to send data to The People's Pension.

When you open your account The People's Pension 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 The People's Pension has "delegated authority" to access your Client's The People's Pension pension scheme (if your Client already has a The People's Pension pension scheme). If you do not have delegated authority then you do not have permission from The People's Pension to upload data to your Clients scheme (either via pensionsync or directly via the The People's Pension online portal).

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

## How to apply for a new pension scheme with The People's Pension

### Can I apply for a People's Pension scheme within pensionsync?

No, it is only possible to open a pension scheme with The People's Pension directly. Once you have opened a People's Pension scheme (for yourself or for your Employer) then you can use pensionsync to submit data to that scheme.

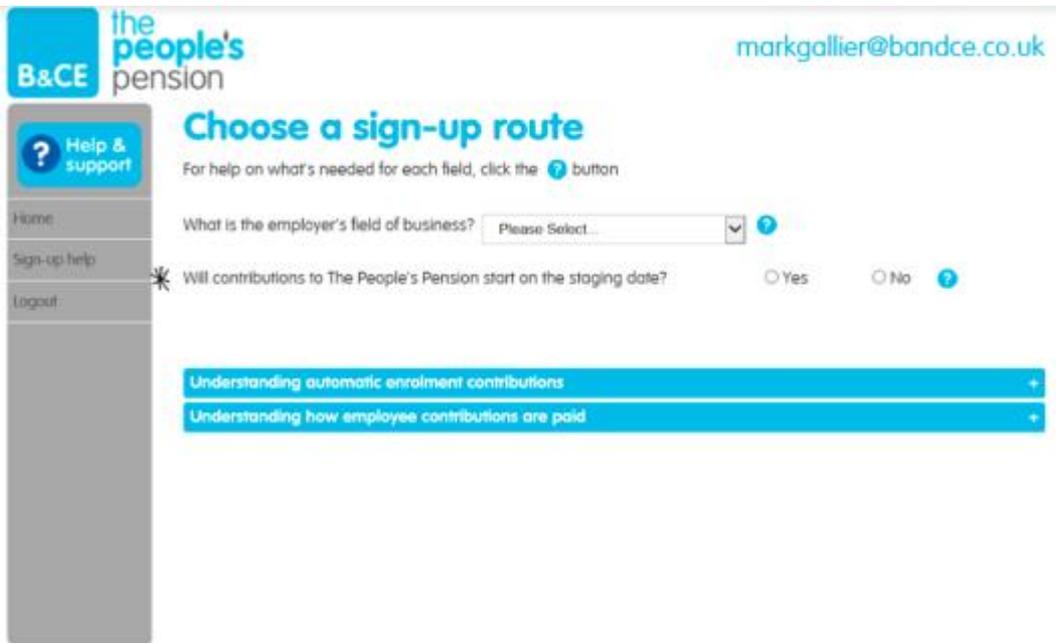
Note, here is the data you will require in order to set up a People's Pension scheme:

- Employer's Field of Business
- Employer's Company Type
- Employer's Name
- Employer's Address
- Employer's Company Registration Number
- Incorporation Date
- Employer's Staging Date
- Number of Employees
- Any other Pension Schemes (with TPP)
- Pay Frequency
- Payroll Package

- Employer's Bank Account Details
- Employer's Mobile telephone number
- Employer's PAYE Reference
- Bank Account evidence

## Opening a scheme with The People's Pension to use prior to staging

If you would like to open a scheme with The People's Pension to use and send contributions prior to your staging date, you are able to do this, however you must then use the "Simply Tailor" sign up route when setting up a scheme, and you must complete the fields as per the below.



The screenshot shows the 'Choose a sign-up route' page in the pensionsync system. The page header includes the 'B&CE the people's pension' logo and the user email 'markgallier@bandce.co.uk'. A left-hand navigation menu contains 'Home', 'Sign-up help', and 'Logout'. The main content area is titled 'Choose a sign-up route' and includes a help instruction: 'For help on what's needed for each field, click the ? button'. The form contains the following fields and options:

- 'What is the employer's field of business?' with a dropdown menu showing 'Please Select...' and a help icon.
- 'Will contributions to The People's Pension start on the staging date?' with radio buttons for 'Yes' and 'No', and a help icon.

Below the form are two expandable help sections:

- Understanding automatic enrolment contributions
- Understanding how employee contributions are paid

You must choose whether contributions will start on your staging date or not.

**Principal employer details**

Company registration number: 06430404

Date of incorporation: 13/09/1989

Postcode: RH10 9QP **Find address**

Address 1: Manor Royal, CRAWLEY, RH10 9

Address 2: Manor Royal

Town: CRAWLEY

County: W Sussex

Telephone number:

Staging date: Please select - Please select -

Will contributions to The People's Pension start before the staging date? \*

Total number of employees:

Approximate number of employees to be enrolled:

Are there any pension schemes being administered other than those with B&CE? \*

How tax relief works: NET

Buttons: Cancel, Save and continue

If you would like the contributions to start before your staging date, you will not be able to send these via pensionsync. We will only be able to accept contributions from your staging date if you have not already sent any contributions prior to this date.

## Working with an existing People's Pension scheme

You are able to send data to an existing People's Pension scheme (unless the scheme was used prior to the staging date as per the above section), 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 People's Pension scheme, via pensionsync. **Please note that authorisation of the People's Pension scheme may need to take place on saving your settings, and it**



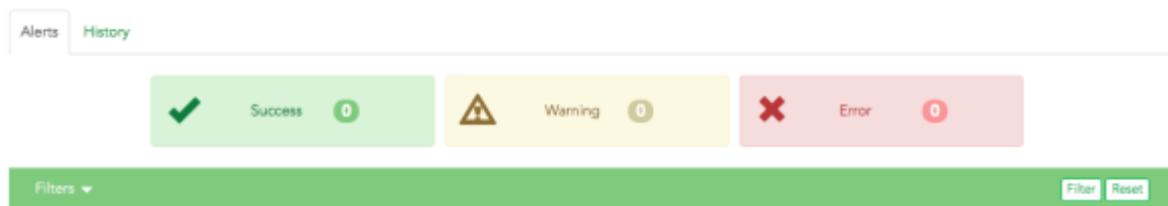
**is important you have switched off your pop-up blocker as this registration window could appear in the form of a pop-up.**

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.



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).

Alerts History

Success 1 Warning 0 Error 2

Filters Filter Reset

✓	the people's pension	B & C E Benefit Weekly	122464	Contributions data successfully submitted	×
✗	the people's pension	B & C E Benefit Weekly	122464	Authorisation required to proceed with contributions submission. Submission will resume automatically after re-authorisation	Authorise ×
✗	the people's pension	B & C E Benefit Weekly	122464	Contributions submission failed for an unknown reason	Details ×

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 The People's Pension (using pensionsync) prior to starting a new pay run. If you do not do this, your subsequent contributions submission to The People's Pension may fail (due to including a contribution for a worker who is no longer a member).

The People's Pension 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 The People's Pension via pensionsync

1. Complete your payroll as you would normally

# pensionsync

2. Follow your payroll software instructions for submitting data to The People's Pension 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. The People's Pension 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.

Please note, if you have a back log of submissions to send to The People's Pension, you must wait 24 hours between each submission.

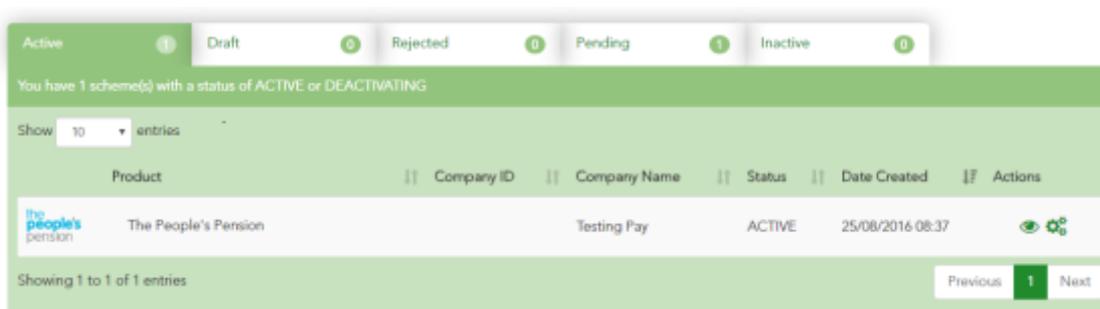
## Success: what, if anything, you need to do next?

For The People's Pension you will have to go into the portal and approve your payments, as The People's Pension does not automatically collect payments from the Employer.

## 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.



Clicking on worker instructions will open a separate dashboard;

 Opt-Out	103	SM301003A	01/07/2016	<a href="#">Details</a>
 Opt-Out	104	SM301004A	01/07/2016	<a href="#">Details</a>

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

 Opt-Out	103	SM301003A	01/07/2016	<a href="#">Details</a>
As Opt-Out Date 09/08/2016				
Opt-Out Window End Date 15/08/2016				

Where worker instructions are made available by The People's Pension, 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 groups must be a perfect match (e.g. case sensitive).
4. Make sure the "payment arrangement" is identical. E.g. "Relief at source" or "Net pay arrangement"

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

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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 The People’s Pension and view these details in the online portal.

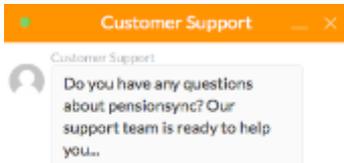
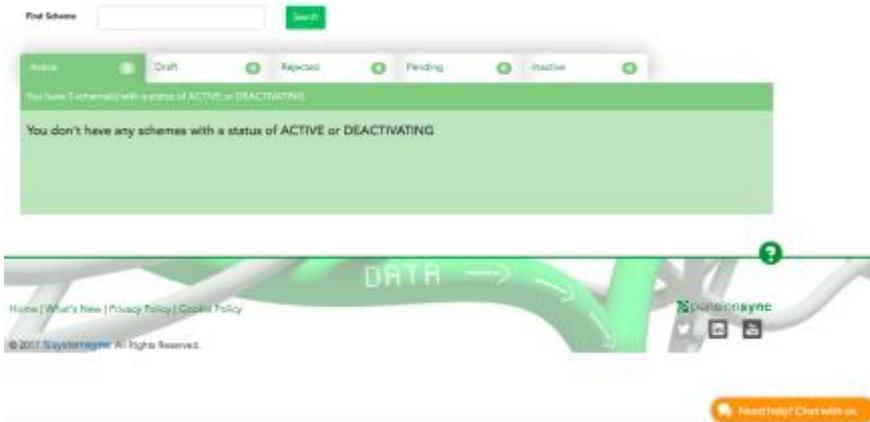
## Need help?

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.





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.