

# pensionsync



*"It should be natural for payroll and pension providers to be integrated, and pensionsync technology does this, while making pension administration quicker, more secure and more efficient."*

*Baroness Ros Altmann CBE - Chair of pensionsync*

## What does pensionsync do and how can we help?

We're integrated into the IRIS Payroll Professional auto-enrolment module, so that your client's pension data can be electronically filed with NEST, The People's Pension, NOW: Pensions, Smart Pension and Aviva.

You save time and money by improving the efficiency of your processes while at the same time making your clients' data more secure.

## Register for your free pensionsync account

As an IRIS Payroll Professional user, you can register for pensionsync quickly and easily - just find us in the Utilities area under Auto Enrolment Admin > pensionsync > Open pensionsync SMT and complete our simple registration form for instant access.

It's free to send and receive data through pensionsync, and with our dashboard and email support you should find it very easy to use. We offer a range of value add Service Packs to enhance your experience and maximise your time savings.

## Complete Pack Discount

Enjoy the very best of pensionsync by enabling all of our great value add Service Packs as an annual upgrade and get our best discounted price for your business.



Payroll Professional

## Create your perfect pension process

With Service Packs to suit your business:  
(All prices are calendar monthly excluding VAT)

Support Pack - £30

- Live web-chat for instant support when you need it most
- Screen shares with our experts to help resolve complex data issues
- Joined up support between us and your payroll software and pension providers

Performance Pack - £60

- Automatic Date Matching: pay period date mismatches fixed instantly and safely
- Automatic Error Correction: simple data format issues resolved with no extra work
- Switch off adverts: remove the clutter to focus on the task at hand

NEST Pack - £60

- Automatic Direct Debit Approval: no need to log in and push "Make Payment"
- Streamlined Scheme Creation: set up NEST schemes for new clients quickly and easily
- Bulk Authorisation: activate pensionsync for all your NEST clients in seconds

*Discounted rates are available for smaller users. Visit the My Service Packs Page in pensionsync for details of our latest offers.*

## How does it work?

### Set up pensionsync feeds in IRIS Payroll Professional

This only takes a couple of minutes and you only need to complete it once per client:

1. Remove any existing pension feed and create a new feed - using Version 42 - pension sync PASS 1.1.
2. Click "Edit" to open the feed details and input the Pension Provider, Employer ID, Group, SubGroup and Contribution Deduction Date and save. The window will close.
3. Open the feed details again and click "Authorise Scheme". A new window will open asking you to enter your username and password for that pension scheme - this is a one-time authorisation which is then stored

### Send and receive pension data

To send and receive pension data - this takes a couple of minutes as part of your regular payroll routine:

1. In your open run, use the Download Pension Notifications button to pull back details of opt outs and other employee changes. This updates the employee records for you before you run payroll.
2. Run your payroll as normal, safe in the knowledge that your pension scheme population is up to date.
3. Open the Auto Enrolment Dashboard and click through the steps from left to right to validate the data, generate and send notices and generate and send your feed. When you click "Send Feed" pensionsync takes over and delivers the data for you.

*"We're saving around 50 hours a month of manual processing by using pensionsync!"*

Suzie Paton, Lizann Berwick & Nicola Swan  
Capital Payroll Services

[Download the full case study](#)

### Use pensionsync to track and audit your data

Check our dashboard to monitor the progress of your pension data submissions:

1. Go to View Feeds > Details > Open SMT (or Open PensionSync SMT via the Utilities area)
2. Track submissions as they are validated by pensionsync (within 1 minute of clicking Send Feed) and as they are confirmed as successful by the pension provider.
3. Review totals accepted by the providers without logging in to their websites and export Alerts histories for your records.
4. Receive detailed, plain English error reports for any failures, designed to help you identify and resolve the source of the error quickly and easily.

### Find out more about pensionsync

At our website: [www.pensionsync.com](http://www.pensionsync.com). Download user guides for IRIS Payroll Professional or read case studies from other IRIS Payroll Professional customers.

Speak to your IRIS Payroll Professional Account manager or send an email to [hello@pensionsync.com](mailto:hello@pensionsync.com) and we will help get you set up with the system.