

Xero and pensionsync

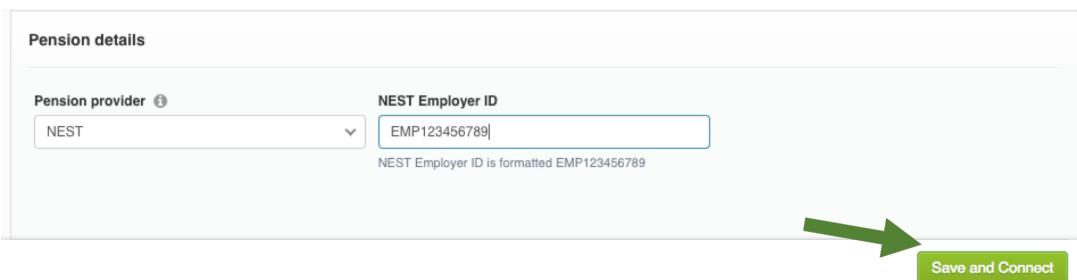
One click Pension Filing



How do I connect Xero payroll to pensionsync?

Save time and transfer your data more securely. It's easy to connect your payroll to pensionsync and to submit your contributions with one click each pay period.

1. In Xero, select the Workplace Pension tab in Payroll Settings.
2. Complete the various details.

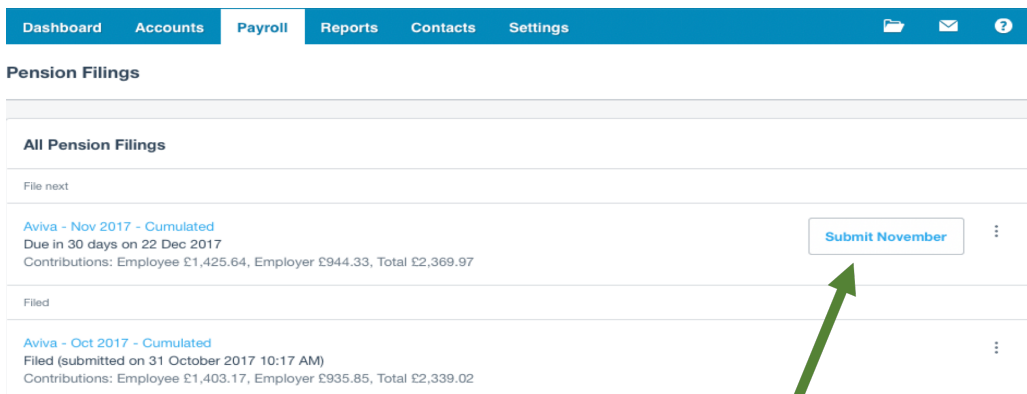


The screenshot shows the 'Pension details' form in Xero. It includes a 'Pension provider' dropdown menu set to 'NEST' and a 'NEST Employer ID' text box containing 'EMP123456789'. Below the text box is a note: 'NEST Employer ID is formatted EMP123456789'. A green arrow points from the bottom right of the form to a green 'Save and Connect' button.

3. When you enter the Pension Details, click Save and Connect.
4. When prompted, authorise the connection with the Username and Password you use to log in to the pension provider's website.
5. You will get on screen confirmation of their acceptance and Xero will confirm that the connection is active by email (this may take an hour).

How do I send Pension Filings at the click of a button?

1. Select Pension Filings from the Payroll menu.
2. Click the Submit button for the relevant pay period as shown below. Your pension data is sent digitally: no manual processing required.
3. You will receive a confirmation email from Xero once the pension provider has processed your data (N.B. some providers process overnight).



The screenshot shows the 'Pension Filings' screen in Xero. The navigation bar includes 'Dashboard', 'Accounts', 'Payroll', 'Reports', 'Contacts', and 'Settings'. The main content area is titled 'Pension Filings' and shows a table of filings. The first row is 'All Pension Filings' with a 'File next' button. Below that, there are two rows of filings. The first row is 'Aviva - Nov 2017 - Cumulated' with a 'Submit November' button and a three-dot menu icon. The second row is 'Aviva - Oct 2017 - Cumulated' with a three-dot menu icon. A green arrow points from the 'Submit November' button to a green callout box at the bottom of the page.

One click Pension Filing using this button!