



**STAR**

The Professionals' Choice

Sending a file via pensionsync  
2016

# Setting up a pensionsync account and sending a file

## What is pensionsync?

pensionsync is a third party provider of integration solutions which connects payroll to pensions so you can send your pension feed to the pension provider at the click of a button.

pensionsync offer a link to a number of pension providers and more are being added periodically. At the time of writing the following providers are supported:

- The People's Pension
- Legal & General
- Smart Pension
- NEST

Pension providers which will be available soon include NOW:Pensions and Aviva.

The files are sent in a similar way to how RTI data is sent to HMRC.

To send a file using pensionsync you will need to set up an account with them (details of how to do this are below) for which there may be a charge. pensionsync have two levels of account; free and premium. To be able to submit applications for new pension schemes or submit contributions to an existing pension scheme you will need to set up a premium account.

pensionsync may charge for sending contributions using their service, for details on the costs involved please visit <https://www.pensionsync.com/ForBureausEmployers>.

By setting up a pensionsync account you will be contracting directly with pensionsync, this will not change your Star terms of business.

## Before starting:

To set up an account with pensionsync your details will need to be completed by the person who will be responsible for setting up and managing pension schemes. This can be the agent; accountant; payroll bureau manager or employer. This person should be a senior manager, ideally someone who can approve the Direct Debit mandate required to become a Premium Customer.

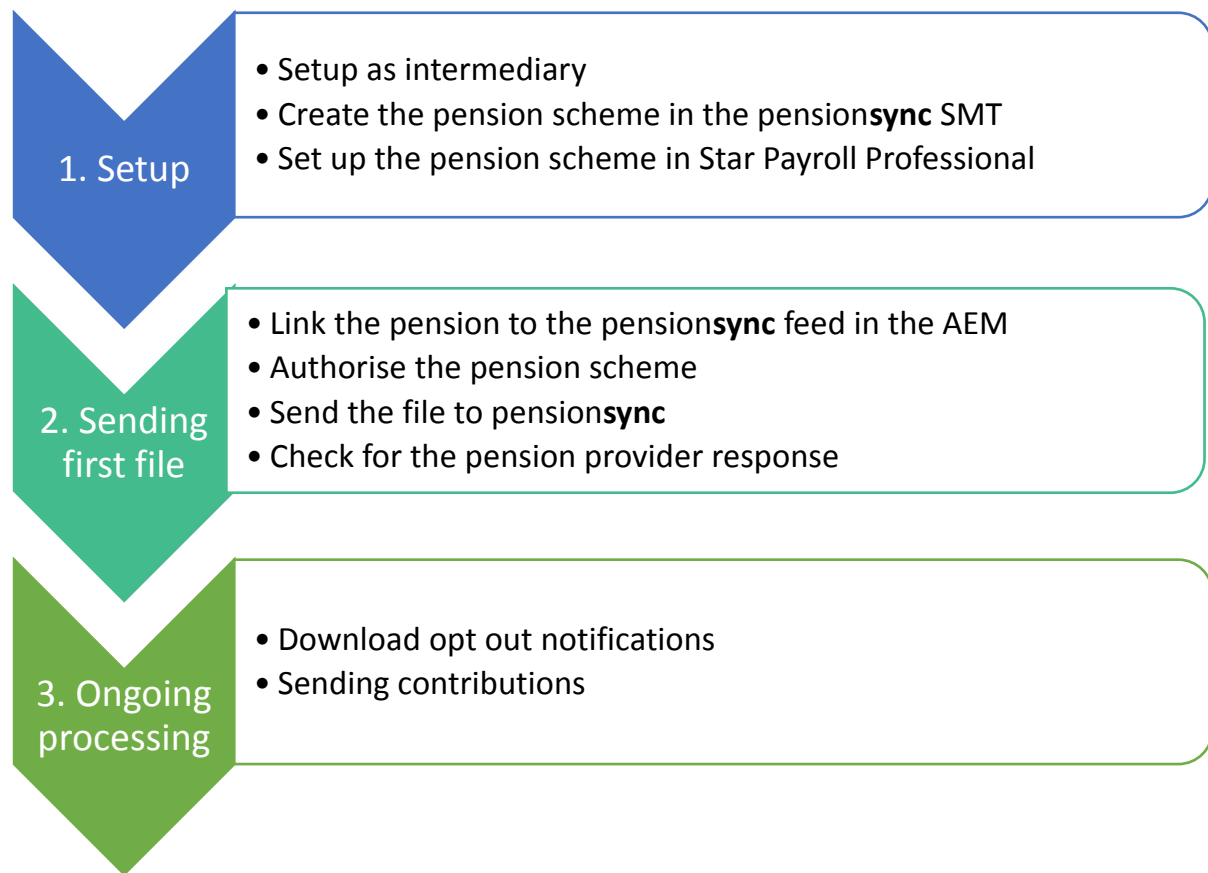
You will need to know the following information before setting up your pensionsync account:

- Has the pension scheme already been set up with the pension provider?
  - If it has do you know the employer ID?
- Has the pension scheme already been set up within Star Payroll Professional?
  - If not what are the contribution rates, how will tax relief be applied, will it be net of BR tax?
- How many groups of employees will there be? – Some providers require different groups to be set up for different payment frequencies or contribution rates etc. These will need to be set up as different pensions within Star Payroll Professional

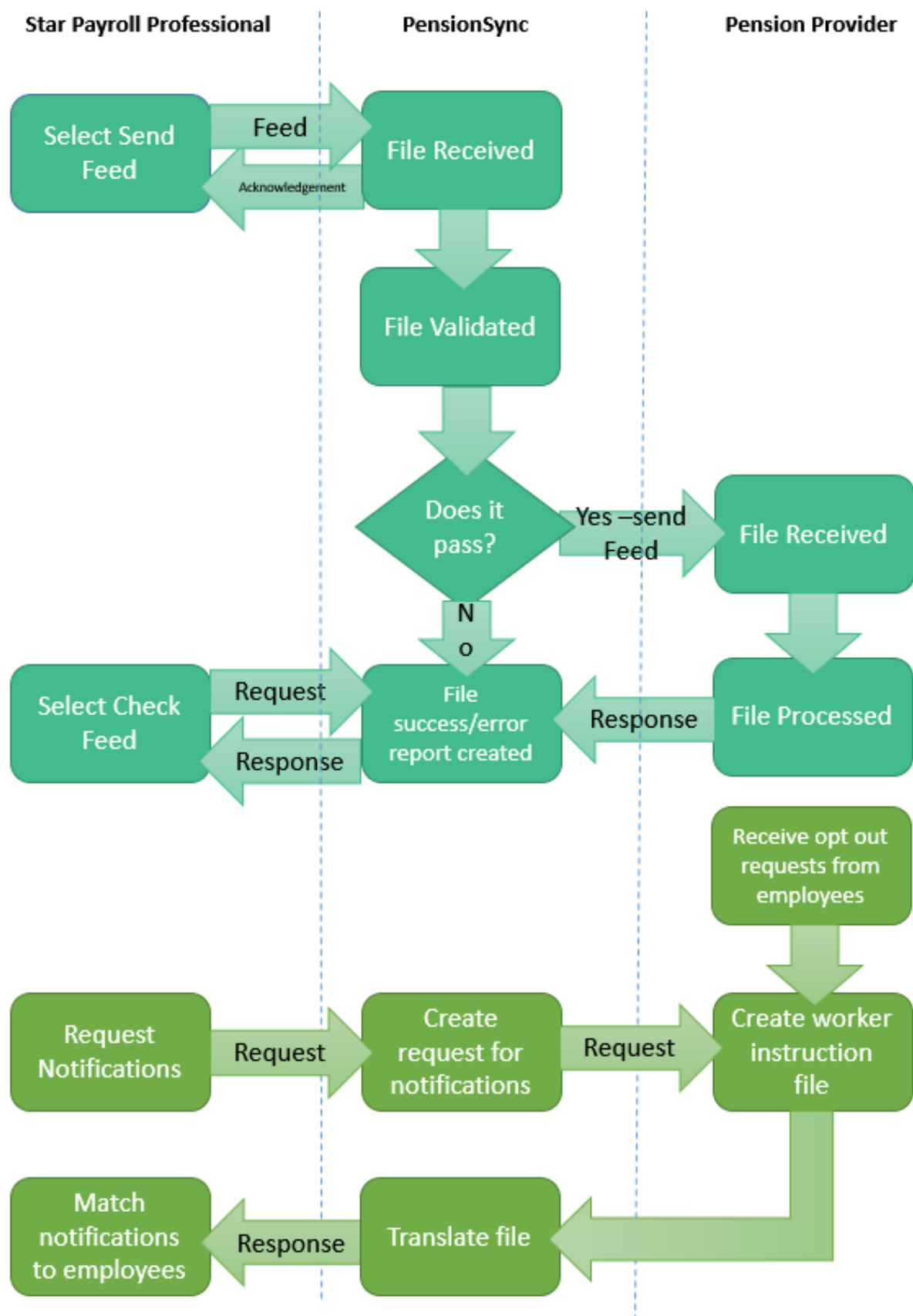
Some pension providers, including L&G and NOW:Pensions, will only allow feeds for new pension schemes to be sent in this way. Existing schemes will need to be sent manually at this time.

This document assumes some familiarity with how Auto Enrolment pension duties are applied in Star Payroll Professional. If you have not applied auto enrolment before it is recommended you first look at the Auto Enrolment documentation and videos available on the support website.

### 3 steps to sending a file:



## How it works:



## 1. Setup

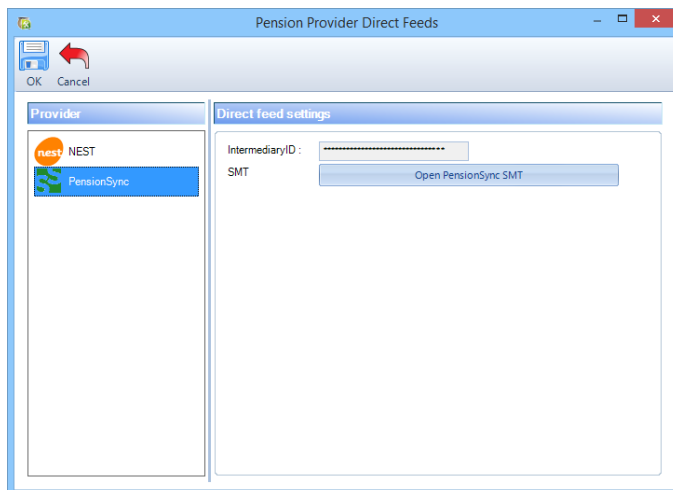
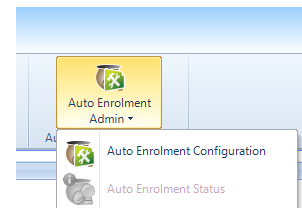
- Setup as intermediary
- Create the pension scheme in the pensionsync SMT
- Setup the pension scheme in Star Payroll Professional

### a. Set up as an intermediary

To send information via pensionsync you will first need to set up an account to act as their intermediary. You will only need to do this once as the same account is used for all of your clients. You can set up and manage your pensionsync account through their Scheme Management Tool (SMT)

This document is designed to guide you through the whole process however if you need a bit more assistance pensionsync have produced a user guide for setting up and managing your pensionsync account, this can be found at: <https://www.pensionsync.com/UserGuides>

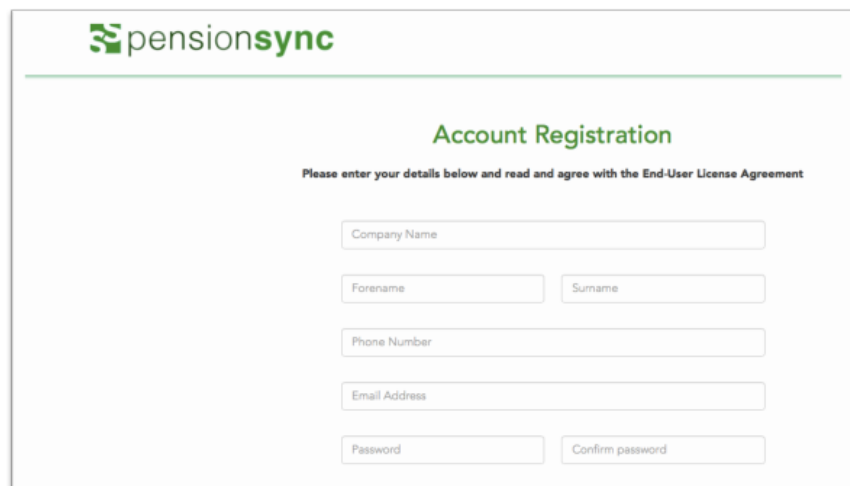
Within Payroll Professional go to the Utilities menu and select Auto Enrolment Admin



Select the pensionsync tab and Click on Open pensionsync SMT.

The pensionsync Scheme management tool will open up in your web browser.

Complete the details to set up your free account.



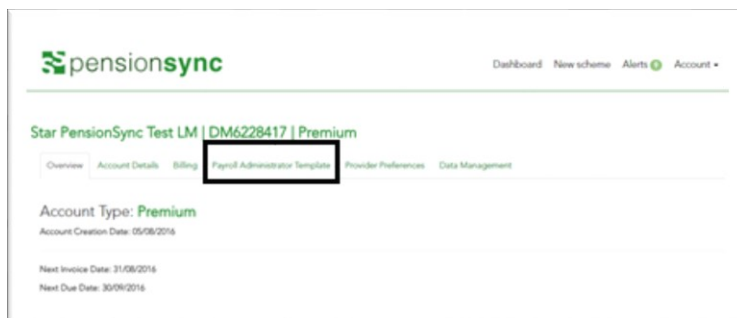
Why upgrading to Premium?		
	Free	Premium
<b>Rates</b>		
Employer per month	0 pence	75 pence
Employee per month	0 pence	15 pence
		2 months free use*
<b>Features</b>		
Line up schemes for available destinations	✓	✓
Submit data for free destinations	✓	✓
Submit schemes for available destinations		✓
Submit data for available destinations		✓
		<a href="#">Upgrade to Premium</a>
*Starting only after the first data submission date		

Once set up you will be taken to your account overview and will have the option to upgrade your account to Premium (you will need to do this to be able to submit contributions to a scheme)

## b. Create the Pension scheme in the SMT

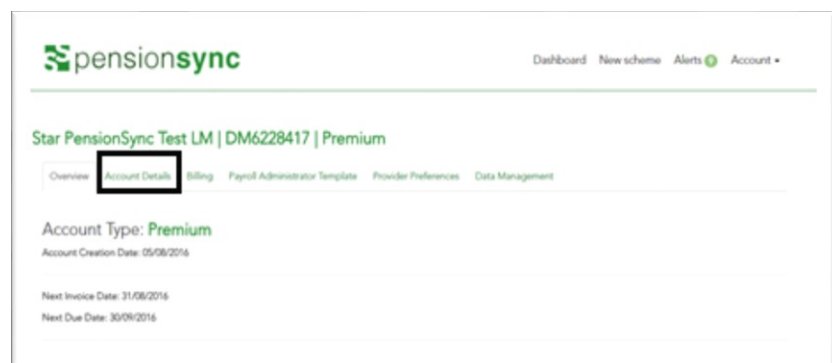
If the pension scheme is not already set up with the pension provider you can do so using the pensionsync SMT. If the scheme has already been set up with the pension provider you can skip ahead to step 2 but will need to make sure you have the following details for the pension scheme:

- Employer ID
- Group(s)
- Sub- group(s) if applicable



It is recommended before you set up any schemes through pensionsync that you set up your payroll Administrators template as this will save you time populating these details in every time you set up a scheme.

If required you can add your company logo and SenderID in the Account details section



**pensionsync**

Dashboard **New scheme** Alerts Account

itar PensionSync Test LM | DM6228417 | Premium

Overview Account Details Billing Payroll Administrator Template Provider Preferences Data Management

Account Type: **Premium**

Account Creation Date: 05/08/2016

Next Invoice Date: 31/08/2016

Next Due Date: 30/09/2016

To set up a new scheme select 'New Scheme'

You must read and check the acknowledgment before you can select the pension provider.

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](#).

Learn More

Learn More

Learn More

Learn More

Learn More

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.

**Legal & General**

**Scheme Information**

Schema:	Legal & General Worksave Pension Plan
Status:	DRAFT
Date created:	
Date of last amendment:	

1 Staging Info 2 Employer 3 Payroll Administrator 4 Contribution Group 5 Contribution Rate 6 Payment Details 7 Submission

You need to agree with all the Terms & Conditions, and enter the necessary staging information before proceeding with a scheme set-up request.

**Terms & Conditions**

☐ Please tick this box to indicate that you have read and can agree the Legal & General Terms and Conditions of Worksave Pension Plan for Auto Enrolment

**Staging Information**

\* Staging Date:

\* Number Of Workers:

Please read the following documents before submitting your application:

[Legal & General Terms of Business, Charges and Service Offering](#)

[Legal & General Data Protection Policy](#)

Next

Complete each screen in turn, the exact details needed will vary depending on the pension provider and at the end details will be sent to the Employer for their confirmation.

You can check the status of the new scheme in the SMT dashboard.

Until the employer and pension provider have approved the scheme it will show in the 'Pending' tab. Once approved it will move to 'Active'.

Active 1 Draft 2 rejected 3 Pending 4 inactive 5

You have 2 scheme(s) with a status of EMPLOYER-PENDING, PROVIDER-PENDING or READY-TO-SUBMIT

Show 10 entries

Product	Company ID	Company Name	Status	Date Created	Actions
Legal & General Worksave Pension Plan		Harper Limited	EMPLOYER-PENDING	24/06/2016 14:10	
National Employment Savings Trust	JON09	Jones Jones Jones Limited	PROVIDER-PENDING	24/06/2016 13:37	

Showing 1 to 2 of 2 entries

Previous 1 Next

### c. If it's a new pension scheme set up the Pension Scheme in Payroll Professional

If it is a new pension scheme which employees have not started paying into yet you will need to set this up within Payroll Professional.

Details on how to set up pension duties and pensions policies can be found in the auto enrolment help guide and video tutorials are available on the support website.

If there are multiple groups set up with the pension provider these will need to be set up as separate pension schemes within Payroll Professional. Once the file is generated for sending to pensions**sync** any pension schemes for the same provider will be included on the same file.

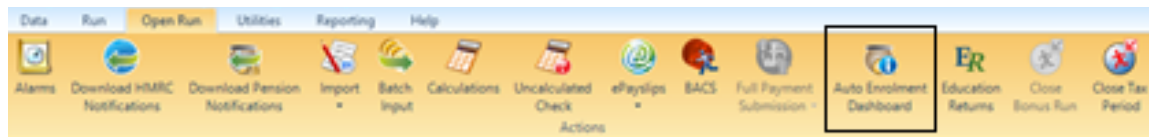


## 2. sending first file

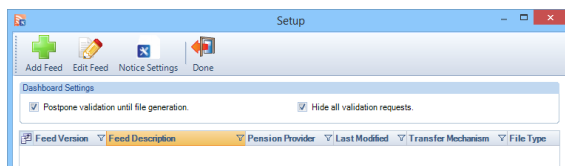
- Link the pension to the pensionsync feed in the AEM
- Authorise the pension scheme
- Send the file to pensionsync
- Check for the pension provider response

### a. Link the pension to the pensionsync feed in the Auto Enrolment Module

Once everyone has been calculated (or marked absent/suspended as necessary) you will need to launch the Auto Enrolment Dashboard (AED) from the Open Run menu.

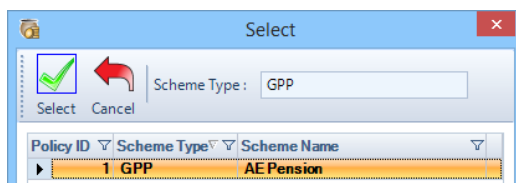
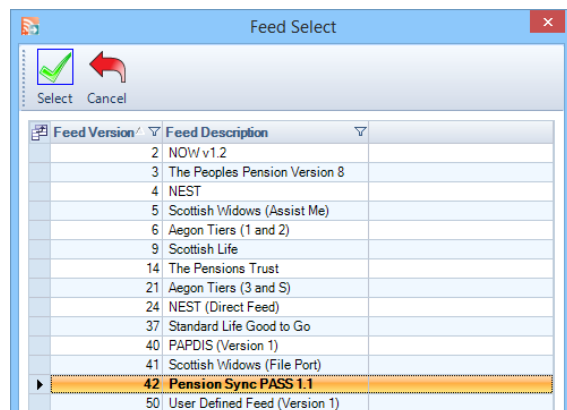


Within the AED select Setup.



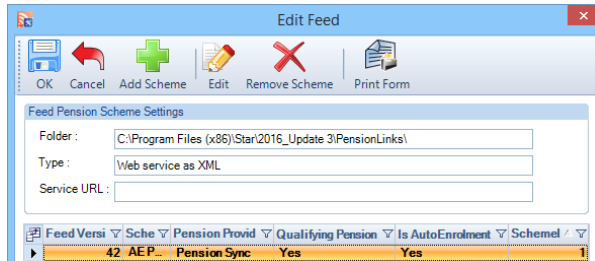
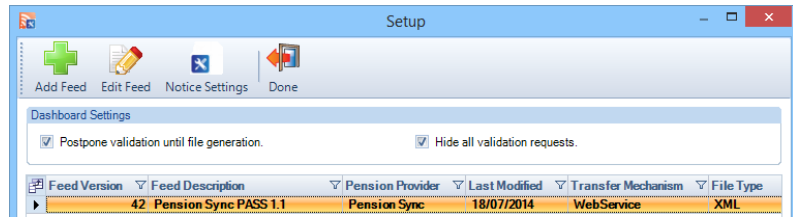
Select Add Feed

Select pensionsync PASS 1.1 from the list



Highlight one pension policy that you want to add to the feed, and click on Select. If you need to add another Feed, then click the Add Feed button and follow the same process as above.

The feed will now show on the setup screen. Select Edit Feed



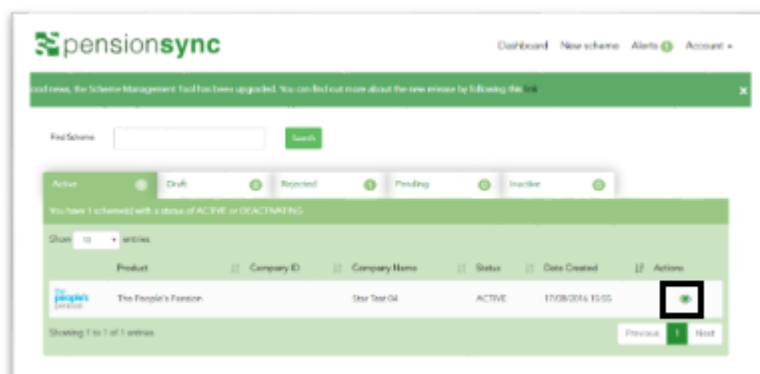
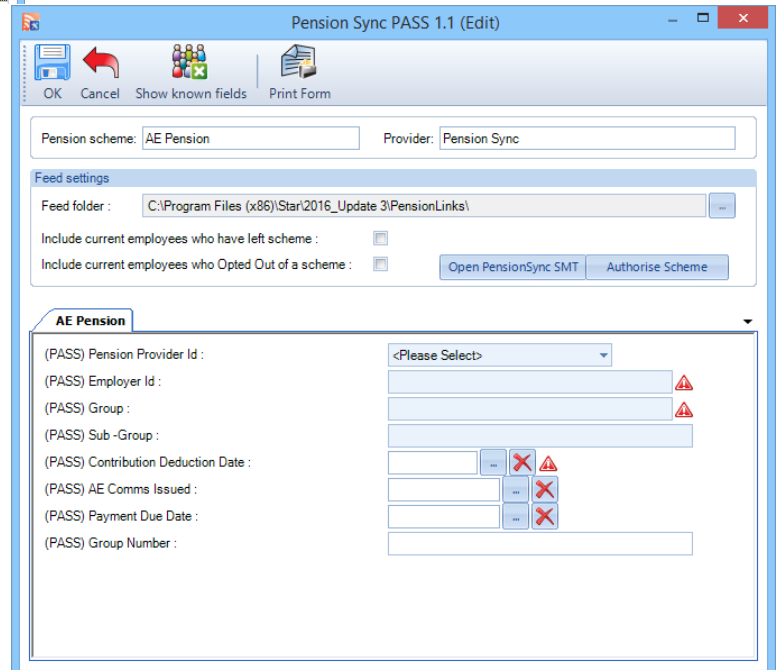
This shows the where the feed file will be saved, the type of feed file produced and the web address the file will be sent to.

Select Edit

Fill in the employer pension details. Fields marked with are mandatory fields and must be completed.

If you do not know these details and set up the pension scheme within the pensionsync SMT you can use the pensionsync SMT to check.

Select Open pensionsync



Within the SMT select Dashboard and select next the pension scheme you need the details for. You will then be able to view the scheme details.

Once the Pension scheme feed is set up select OK to save. You must do this before going onto the next step.

## b. Authorise the pension scheme

You only need to do this step if you did not set up the pension scheme in the pensionsync SMT.

Once the pension feed details are set up and have been saved go back into the feed edit screen and select Authorise Scheme.

The pensionsync SMT authorisations screen will appear. You need to login to the Authorisation section of the SMT so please ensure this step is done by someone with the relevant credentials (The login details are the ones normally used to login to the pension provider website).

You will need to complete the Authorisation screens (these may differ depending on the pension provider).

Once Authorised you will be able to see all of the authorised pension schemes by going to Account Authorisations within the SMT.

Product	Employerid	Company Name	Status	Updated	Actions
The People's Pension	159603	Star Test 04	Authorised	8/18/2016 1:33:17 PM	
Smart Pension	4072		Authorised	8/17/2016 11:41:34 AM	

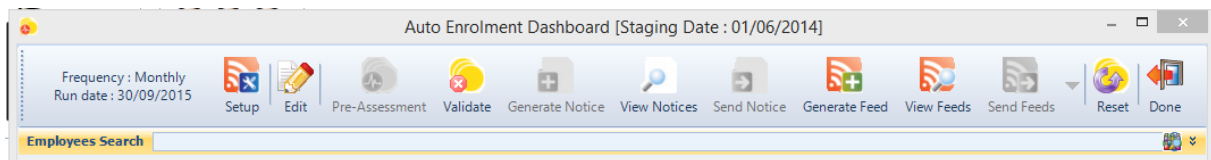
Your pensionsync feed is now setup.

Before moving on to the next step you may need to complete the setup of notices and any other pension scheme feeds which you are not sending by pensionsync. For details on how to do this please visit the support website for documents and videos.

## c. Send the file to pensionsync

Once you have finished setting up the auto enrolment dashboard you can start sending feeds.


The Auto Enrolment Dashboard works from left to right, first produce any notices (if needed) and once done select Send Notice.

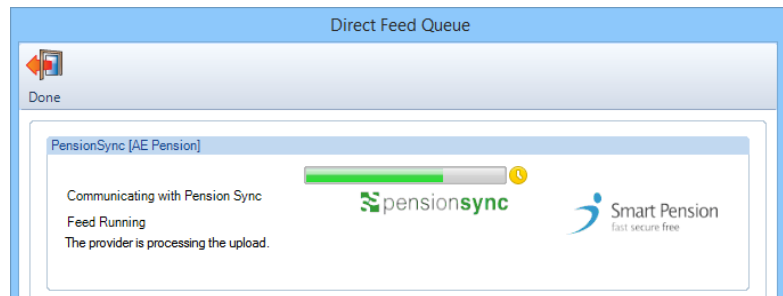


Select Generate Feed and the xml file will be saved to a location on your pc in the correct format ready to send to pensionsync. You should not need to change this file. Any changes to the file may cause the feed to fail. If you believe data is being produced incorrectly please contact Star support.

Once the File is generated select 'Send Feed'.

The Direct Feed Queue will appear showing the status of all Direct Feeds.

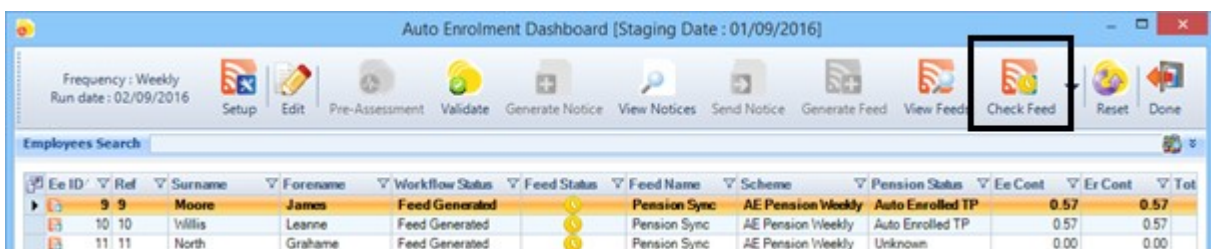
Once sent all employees will be updated on the dashboard to show the symbol: 



#### d. Check for the pension provider response


Once the file has been sent it will be processed by pensionsync and the pension provider. This typically takes between a few seconds and half an hour, but can take longer depending on a number of factors (pension provider, number of employees, time of submission etc.) so you may wish to go away and process another payroll while you are waiting.

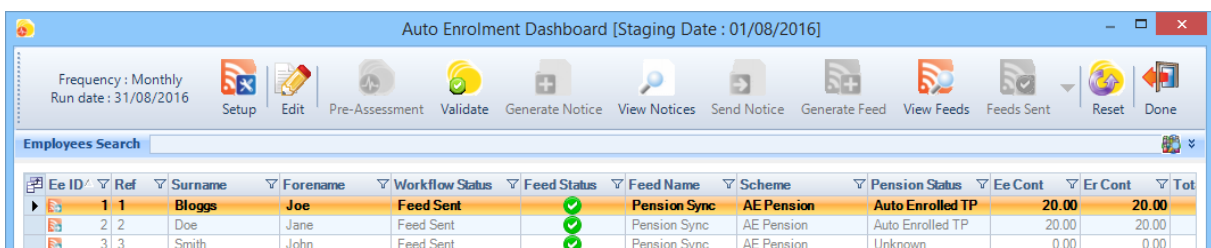
You can check if the file has been processed by selecting Check Feed.




This will send a request to the pensionsync and they will return one of the following:

1. A message that the pension provider is still checking the file, please check again later
2. Notification that the file has been processed successfully by the pension provider
3. An error report showing any errors on the xml file

If the file has been processed successfully all employees will be updated to show the symbol , you can then proceed to step 3.



If the feed contained errors, any employees on the failed feed will show with the symbol: 


Auto Enrolment Dashboard [Staging Date : 01/08/2016]

Frequency : Monthly  
Run date : 31/08/2016

Setup Edit Pre-Assessment Validate Generate Notice View Notices Send Notice Generate Feed View Feeds Send Feed Reset Done

Employees Search

Ee ID	Ref	Surname	Forename	Workflow Status	Feed Status	Feed Name	Scheme	Pension Status	Ee Cont	Er Cont	Tot
1	1	Bloggs	Joe	Feed Generated	!	Pension Sync	AE Pension	Auto Enrolled TP	20.00	20.00	20.00
2	2	Doe	Jane	Feed Generated	!	Pension Sync	AE Pension	Auto Enrolled TP	20.00	20.00	20.00
3	3	Smith	John	Feed Generated	!	Pension Sync	AE Pension	Unknown	0.00	0.00	0.00

If there are errors on the file you will be able to view the errors by selecting View feed. Any failed feeds will show the  symbol

View Feeds

View Feed Open Folder Details Print Done

Payroll Run Dates

Run Dates

- 2016/2017
  - Monthly
    - 31/08/2016 - Period 5

Status

Payroll tax year	2016/2017
Run date	31 August 2016
Period	5
Total	12
Sent	0
Failed/Cancelled	11
Created	0
Workflow status	OK

Provider Feed Submissions

Show failed / cancelled: ☒

ID	Provider Name	Feed Name	Date	By	File Path	File Name	Feed Status	Info
12	Pension Sync	Pension Sync P...	01 Sep 2016...	Admin	C:\Program File...	17660_Pension...	!	<<T

View Feeds

Prev Next Select Submit Check Confirm Cancel Print Report Done

Preferences

Status

Details

Files

Details

Created date: 01 September 2016 08:43:53

Created by: Admin

Submitted date: 01 September 2016 08:42:1

Submitted by: Admin

Confirmed date:

Confirmed by:

Cancelled date:

Cancelled by:

Transaction ID: Star Star PensionSync Test

Correlation ID: d6c468e3b67c499c8e54a5fcd9cddbf

Response: Provider specific data error has been encountered, the file may be corrupt. 17660\_pension\_sync pass 1.1\_20160901094155\_contribution\_1.SMP.log.xml

Open SMT

Select Details and go to the Details tab to see the error message returned by pensionsync.

You can also open the pensionsync SMT where more details may be available on the alerts page.

pensionsync

Dashboard New scheme Alerts Account

Good news, the Scheme Management Tool has been upgraded. You can find out more about the new release by following this link

Alerts History

Success 0 Warning 0 Error 1

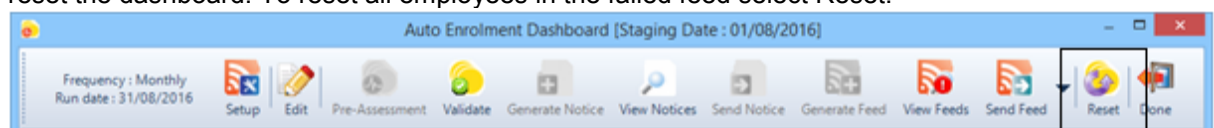
Filters

Contributions submission failed pension provider validations 01/09/2016 07:45 Details

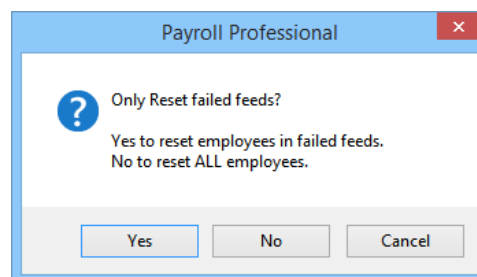
Field Name	Source Value	Employee Id	Issue Description
Title	Miss	1	Title must match Gender

Download CSV Error Report

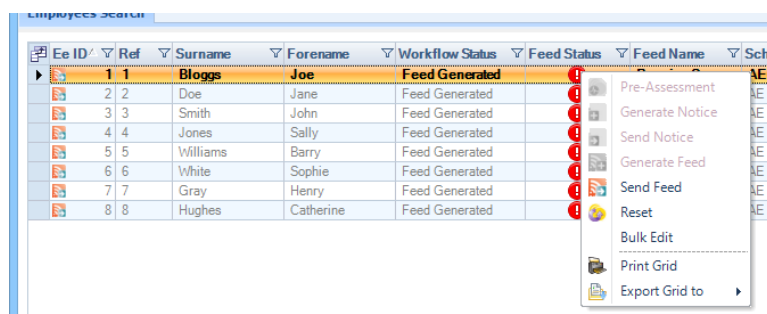
If the errors received mean that employees need to be sent to pensionsync again you will need to reset the dashboard. To reset all employees in the failed feed select Reset.



The option will be given to only reset employees who are in the failed feed. If you have more than one pension feed you can therefore select Yes and only the failed feed will be reset. If you wish to reset all employees select no.



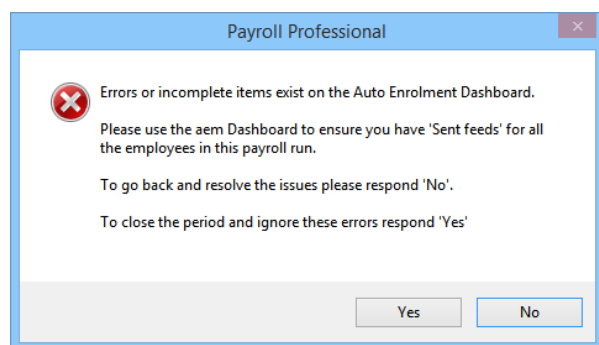
If the error is with a single employee it will depend on your pension provider whether you have to send the whole file again or if can send a file containing just this employee. Check out our FAQs document to see which your pension provider will accept.



If the pension provider will accept a file with just the single employee you can select the employee and right click to be able to reset just this employee.

Once you are happy you have sent all of your feeds and they have been processed successfully you can close the dashboard.

If you attempt to close the pay period without all feeds being sent successfully you will receive the following warning:



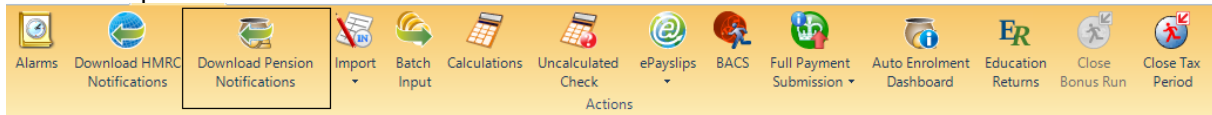
It will not be possible to re-visit the AED for that pay period once the period has been closed so please ensure all files have been sent and a success response has been received before closing the period.

### 3. Ongoing processing

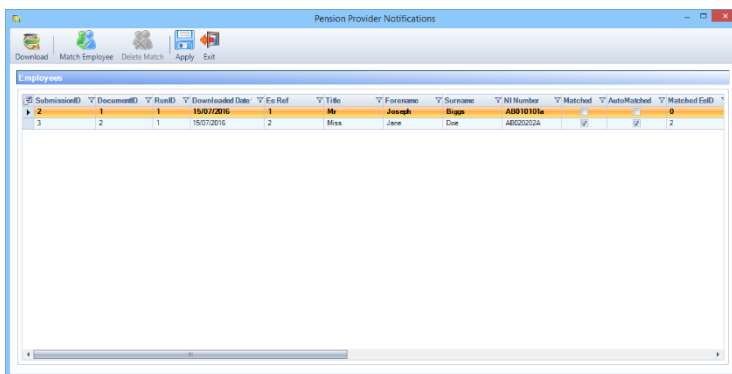
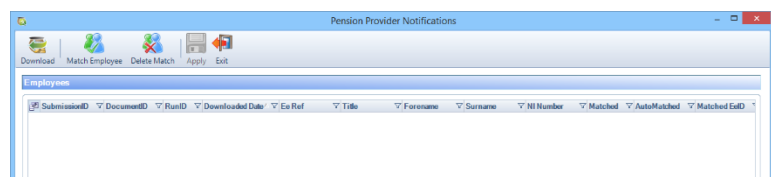
- Download Opt out notifications
- Sending contributions

#### a. Download opt out notifications

Once you are in the next pay period you can download any opt out notifications from pensionsync. From the Open Run select Download Pension Notifications



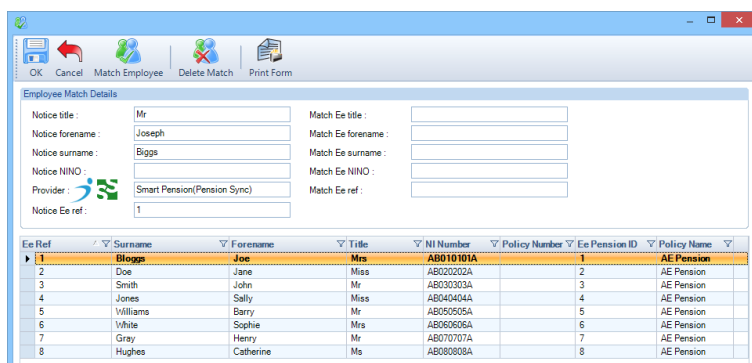
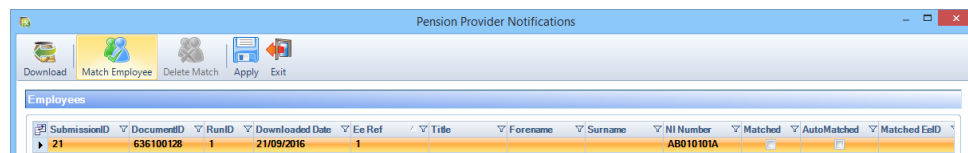
Select Download and the grid will populate with any available notifications



Where enough information is available then the notification will be matched automatically to the employee.

Matched employees will show a tick in the Matched and Automatched columns.

You can manually match an unmatched notification by selecting the employee and clicking Match Employee



A screen will appear where you can select the correct employee.

Employees who are members of more than one pension scheme will appear in the list multiple times so that the notification can be matched to the correct pension scheme.

Once all employees are matched select Apply and the notification details will be saved to the employee's record. If the employee has already been calculated you may need to re-calculate the employee to include the notification details.

Once the notification has been applied it will disappear from the grid.

You can see a history of all worker instructions on the SMT by going to the dashboard and selecting the relevant icon next to the pension scheme.

The screenshot shows a dashboard with tabs for 'Active', 'Draft', 'Rejected', 'Pending', and 'Inactive'. Below the tabs, it states 'You have 6 scheme(s) with a status of ACTIVE or DEACTIVATING'. A table lists three active pension schemes. In the 'Actions' column, a box highlights two icons: a magnifying glass and a document icon, which correspond to the worker instructions history.

Product	Company ID	Company Name	Status	Date Created	Actions
NOW: Pensions		TestCo	ACTIVE	16/09/2016 08:30	[Icons]
Smart Pension		Star Computers Limited	ACTIVE	14/09/2016 16:19	[Icons]
Legal & General Worksave Pension Plan		Star Computers Limited	ACTIVE	14/09/2016 16:16	[Icons]

The screenshot shows the 'Worker Instructions' page for 'TestCo | PS10'. It includes a 'Download Worker Instructions' link. Below is a table listing individual worker instructions with columns for instruction type, count, ID, date, and a details link.

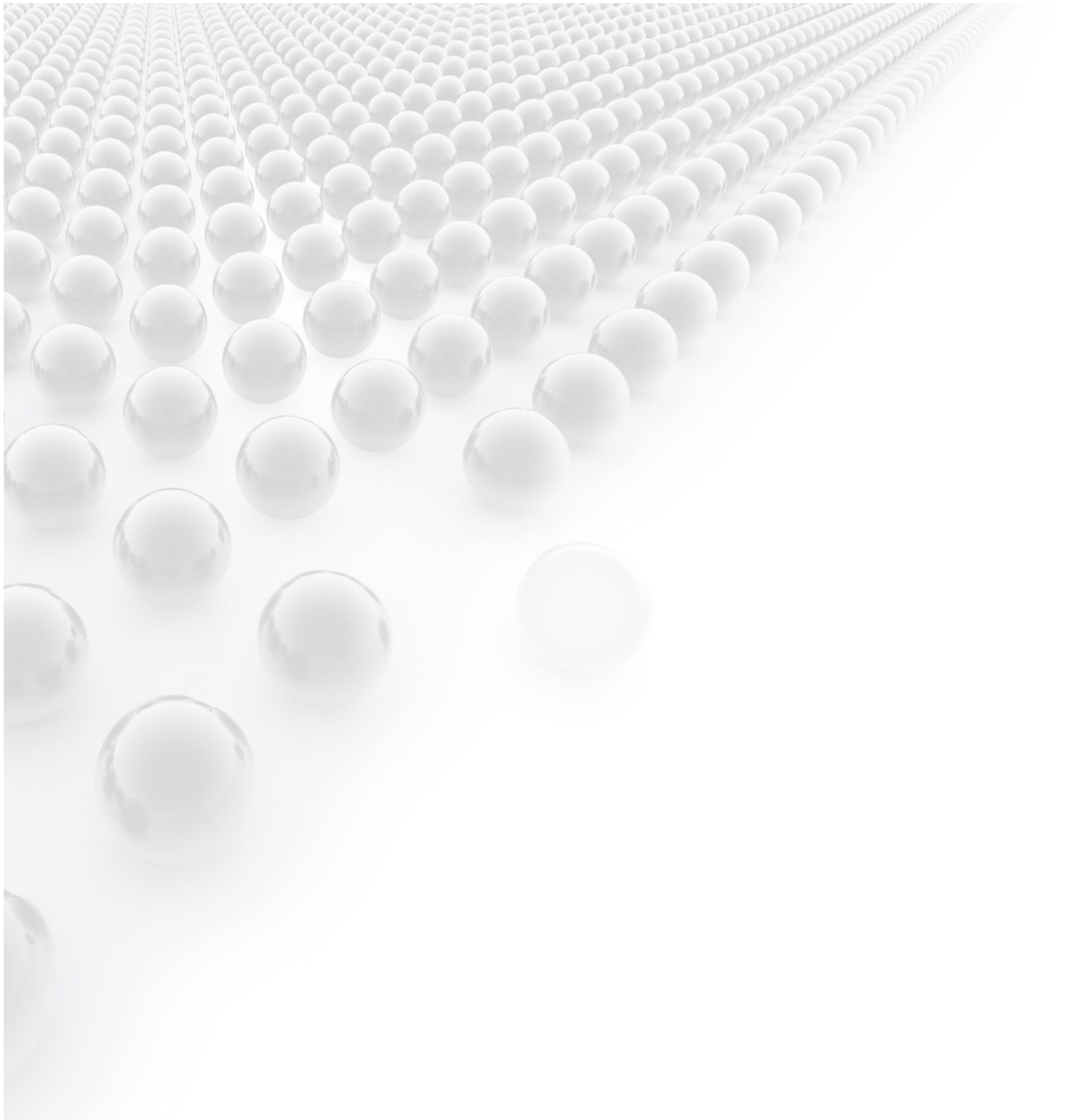
Instruction Type	Count	ID	Date	Details
Opt-Out	2	A802020A	19/09/2016	Details
Opt-Out	1001	TW234793A	18/08/2016	Details
Opt-In	1001	TW234793A	18/08/2016	

A list of all worker instructions will be shown and this can be downloaded as a csv file.

## b. Sending contributions

Each pay period you will need to send the file as laid out in steps 2c and 2d.





For more information visit [www.star-payroll.com](http://www.star-payroll.com)  
or contact your nearest Star centre:

**STAR**  
The Professionals' Choice

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Email: [payrollsupport@star-payroll.com](mailto:payrollsupport@star-payroll.com)  
Web: [www.star-payroll.com](http://www.star-payroll.com)