

| Retirement | Investments | Insurance | Health |



Guide to working with Aviva

via **PensionSync**



Contents

Open an account with Aviva	3
How to apply for a new pension scheme with Aviva	4
Can I apply for an Aviva scheme within PensionSync?	4
Working with an existing Aviva scheme	5
Using the Alert dashboard	6
Using pensionsync to retrieve employee opt-outs	7
Submitting contributions each pay period	8
Sending data to Aviva via PensionSync	8
Checking everything has worked correctly	8
Success: what, if anything, you need to do next?	8
Ensuring the pension scheme in your payroll software is correctly defined	9
Need help?	10

Open an account with Aviva

You must have opened an account with Aviva and have an account with PensionSync to send data to Aviva

When you open your account Aviva 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”.

Aviva can be used by business advisers as well as employers. If you are a business adviser, the account with Aviva needs to have “delegated authority” to access your client’s Aviva pension scheme (if your client already has an Aviva pension scheme). If you do not have delegated authority then you do not have permission from Aviva to upload data to your client’s scheme (either via PensionSync or directly via the Aviva online portal).

If you or your client does not have an existing scheme with Aviva then you can use your Aviva account to apply for a new scheme through PensionSync.

If you are a PensionSync account holder, you will have access to the PensionSync Dashboard which provides an overview of all your schemes in one ‘easy to manage’ area.

How to apply for a new pension scheme with Aviva

Can I apply for an Aviva scheme within PensionSync?

Yes, you can apply to Aviva through the link in PensionSync. Go to “New Scheme” and click on the Aviva link in order to do this. Once you have opened an Aviva account, then you can use PensionSync to submit data to that scheme.

Aviva can provide a quote online within just 10 minutes using their quick and easy Quote and Apply service.

Note, there are two steps to applying for an Aviva scheme. Here’s the information needed at each step:

Step 1: Requesting a quote

- How many people in your business are aged 22 or above, including you?
- Of those, how many earn over £10,000 per year?
- What is their combined annual basic pay?
- What is your company’s staging date/duty start date?
- Do you want the pension contributions to be based on qualifying earnings?
- Contributions for the scheme - Employer (%)
- Contributions for the scheme - Employee (%)
- Details of Employer; Title, Full Name, Email Address

Step 2: Applying for a scheme

- Legal status of your business
- Registered name of your business
- Name to appear on policy documents
- Business Address in full
- Company registration number
- PAYE reference number
- Staging date
- Company start date
- Payroll software provider
- Authorised Signatory and details
- Scheme notifications email address (contact for invoicing and legal notices)
- Online scheme managers/administrators
- Additional scheme management system user details (if applicable)
- sort code of your business bank or building society
- Name of your business bank or building society
- Business account number
- Business account name
- Preferred date to pay the employer pension (scheme administration) charge
- Confirmation you are an authorised account holder
- Billing address

Working with an existing Aviva scheme

You are able to send data to an existing Aviva scheme, 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 done once. You may need to change the settings within your payroll software to enable submitting data to Aviva, via PensionSync. Please note that authorisation of the Aviva 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:

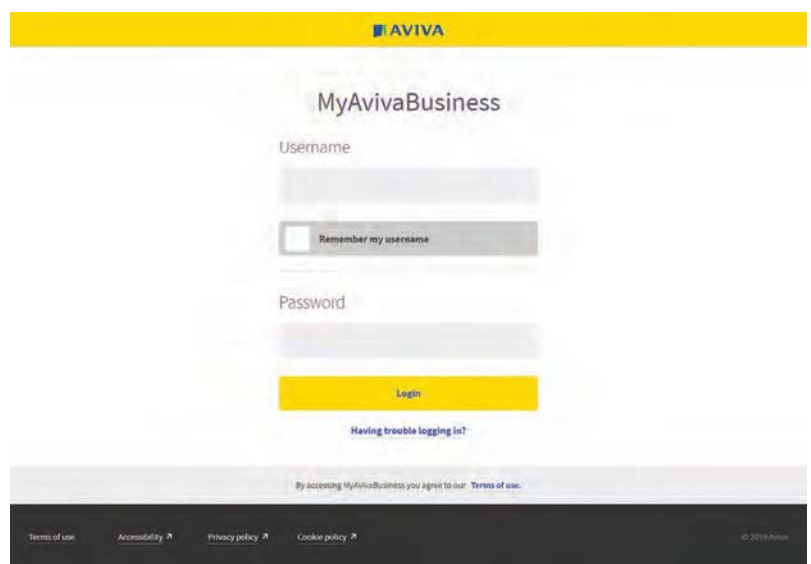
- a. refer to the User Guide section of our website for information specific to your payroll software product, or
- b. contact your payroll software's customer support team, or
- c. contact the PensionSync support team via the scheme management tool

2. Complete your payroll as normal for that pay period.

You can then attempt submitting data to us. The beauty of PensionSync is that we will validate and check for errors and you will be informed and able to make corrections within your payroll software before the file is submitted to Aviva. If you do experience an error message, either thrown up by your payroll software, or within PensionSync, then visit the PensionSync Dashboard to review details of the error and how to fix it. PensionSync allows you to resolve errors quickly and easily without needing to do any payroll rework.

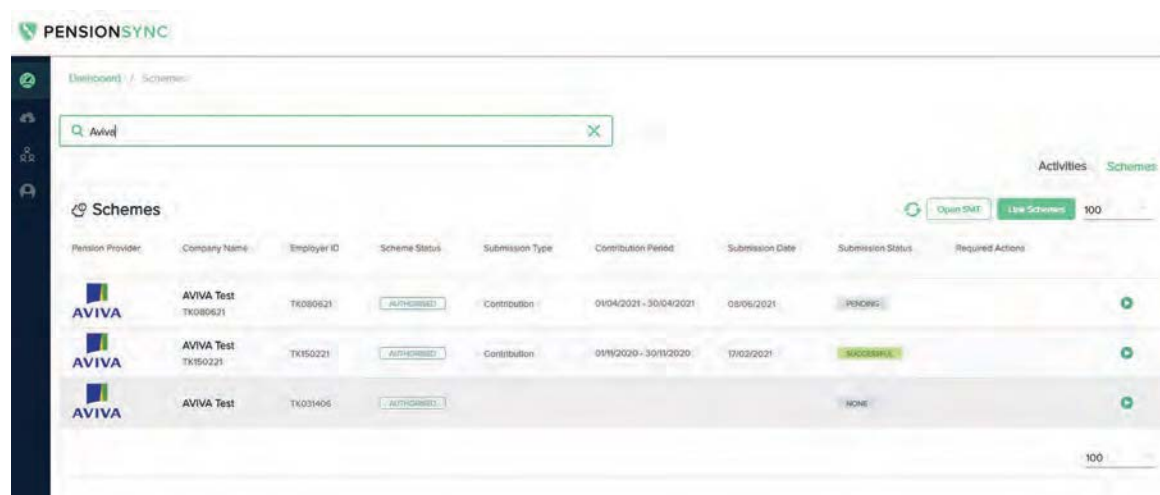
- a. Check the PensionSync Dashboard. There will be an explanation of the error and what you need to do to correct this. If you need our help, then please use our chat tool to speak to one of the support team.
- b. If you are unable to open PensionSync then please call your payroll software customer support team, or email us at support@pensionsync.com.

Aviva's new billing platform can be used via PensionSync for existing and new customers, you can access the Workplace Pension Portal [here](#).



Using the PensionSync Dashboard

We recommend you check PensionSync Dashboard at regular intervals. PensionSync uses the dashboard to notify you of any actions that may require your attention.



The PensionSync Dashboard provides a “Schemes” view which enables you to immediately see the status of the latest submission to your pension scheme(s), including whether they have been processed successfully, are still pending or have any errors. Alternatively, you can use the “Activities” view which shows a granular listing of each activity on your pension scheme(s).

PensionSync completes upfront validation within approximately 60 seconds – you’ll get a blue alert as soon as this has been completed so that you know the data is with Aviva to be processed, and you should get a green alert in due course.

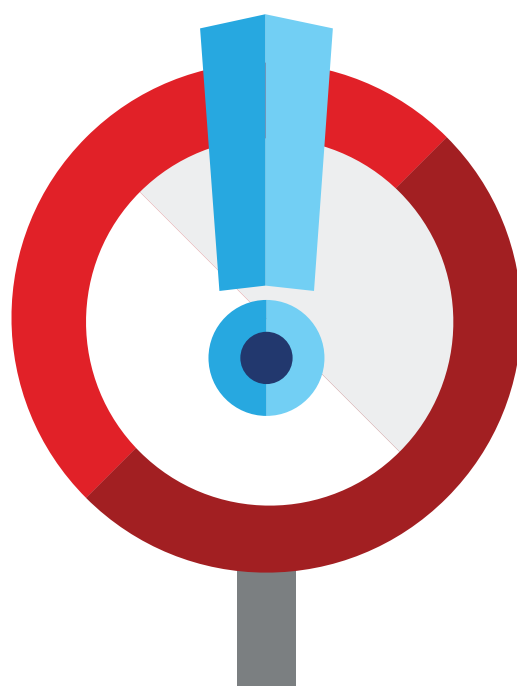
If you have submitted data, and PensionSync has taken an action such as applying an Automatic Date Match*, you will receive an alert in the yellow “Warning” tab.

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 you’re not sure how to resolve an error, we advise you contact the PensionSync support team for assistance. You can dismiss 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.

***Automatic Date Matching – Aviva expect contributions to be sent on a calendar monthly basis. If the payroll dates are something other than a calendar month, PensionSync may be able to automatically match the payroll dates to the month that Aviva is expecting.**



Using PensionSync to retrieve employee opt-outs

Best practice is that you should retrieve employee opt-outs from Aviva (using PensionSync) prior to starting a new pay run. If you do not do this, your subsequent contributions submission to Aviva may fail (due to including a contribution for a worker who is no longer a member).

Aviva transmit the opt-out information to PensionSync. This can then be 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.

Worker Instructions

If a worker has opted out this can be viewed in the PensionSync Dashboard. Click the green chevron beside the scheme to view more information. (screen shot 3 provided)



Scroll down to the Worker Instructions section, which will display up to date details of recent opt outs.

Status	Employee ID	National Insurance no.	Event date	Details
Opt Out	12	KA131587B	03/07/2021	

Where Worker Instructions are made available by Aviva, 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. You can download a CSV report of Worker Instructions from PensionSync as required.

Submitting contributions each pay period

Sending data to Aviva via PensionSync

1. Complete your payroll as you would normally
2. Follow your payroll software instructions for submitting data to Aviva via PensionSync OR export a pension data file and upload it directly to the PensionSync Dashboard.

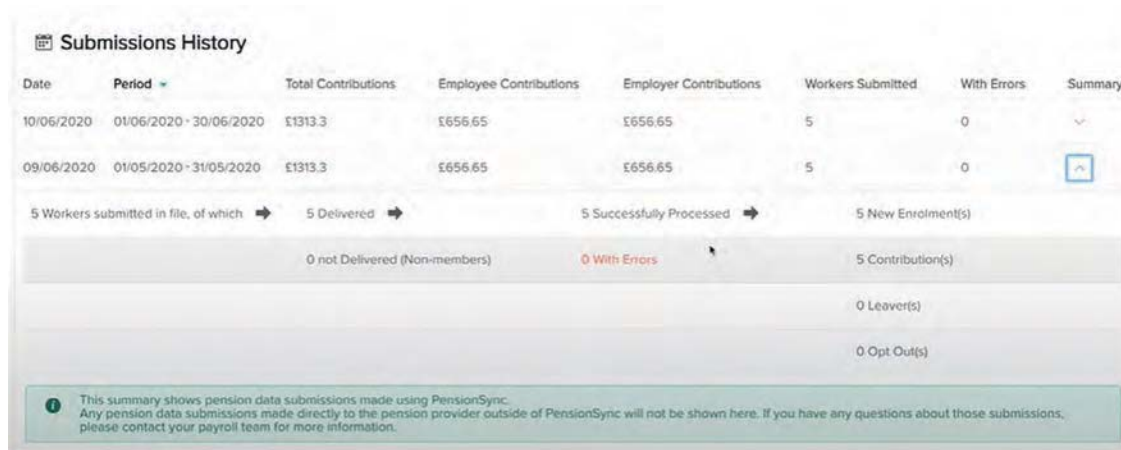
Checking everything has worked correctly

1. Check the PensionSync Dashboard “Schemes” view for the status of your latest submission.
2. Any Required Actions will be clearly displayed on screen, along with a status showing whether the file is successful, pending or has errored.
3. Once your submission is successful, Aviva will email the payroll administrator to confirm the data has been processed. You can also see confirmation in the Aviva portal online.

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

You will not have to do anything further as payments will be automatically collected by Aviva.

You can view details of all successful data submissions by clicking the green chevron next to the scheme in the PensionSync Dashboard. You will be taken to a scheme details page, which includes a Submission History section.



Date	Period	Total Contributions	Employee Contributions	Employer Contributions	Workers Submitted	With Errors	Summary
10/06/2020	01/06/2020 - 30/06/2020	£1313.3	£656.65	£656.65	5	0	▼
09/06/2020	01/05/2020 - 31/05/2020	£1313.3	£656.65	£656.65	5	0	▲

5 Workers submitted in file, of which → 5 Delivered → 5 Successfully Processed → 5 New Enrolment(s)

0 not Delivered (Non-members) 0 With Errors 5 Contribution(s)

0 Leaver(s)

0 Opt Out(s)

i This summary shows pension data submissions made using PensionSync. Any pension data submissions made directly to the pension provider outside of PensionSync will not be shown here. If you have any questions about those submissions, please contact your payroll team for more information.

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. Contribution frequency -

Aviva arrange all contributions into calendar monthly schedules so it is important your payroll is configured in line with this.

2. Scheme identifiers -

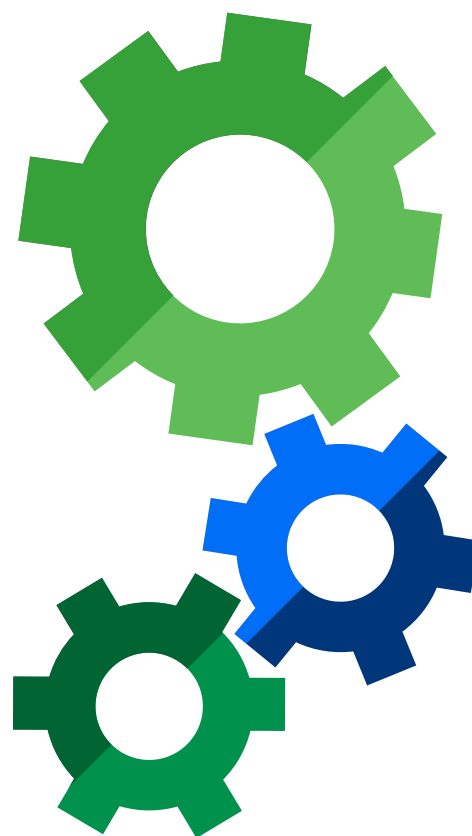
Ensure you have entered all applicable identifiers into your payroll software. Aviva allocate a Scheme Number for the scheme and a Category Number for each category within the scheme. If there is only one category, the Scheme Number and Category Number will be the same.

3. Tax relief -

Make sure tax relief is set up correctly for the scheme based on the "payment arrangement". For Aviva, this is always the Relief at Source method (contributions deducted net of basic rate tax relief from after-tax pay)

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.

If you are not sure what the settings within the scheme are, then you can log in to Aviva and view these details in the online portal.



Need help?

This final section explains how to get support when using PensionSync.

Expert Support

PensionSync's team of pension experts specialise in helping payroll users manage their pension administration.

Visit pensionsync.com/support to access our extensive Help Centre and to contact the team.

The image shows a screenshot of the PensionSync website's support page. The top navigation bar includes links for Home, PensionSync Dashboard, Business Type, Pricing, Resources, and a Sign In button. The main heading is 'Support', followed by a message: 'If you have any queries or concerns, our dedicated support team is here to help. Please contact us by email and we will reply as soon as possible within the SLA applicable to your plan.' Below this are two buttons: 'Send us a support request' and 'Search online help'.

The 'Support Query Form' is displayed below. It contains the following fields and sections:

- Enter your name (with a copy icon)
- Email
- Business name and Business website (two separate input fields)
- Text area: 'Are there any affected pension submissions? If so, please enter the date the data was submitted.'
- Text area: 'Are there any affected employees? If so, enter their full name and employee ID (usually their payroll reference).'
- Text area: 'Add any additional details that may assist us in our investigation, including the username you use to log in to PensionSync.'
- Checkbox: 'By submitting your details you agree to our Terms & Conditions and our Privacy Policy, and you agree to opt into receiving emails. You can unsubscribe at any time by clicking the link in the footer of our emails.'
- Checkbox: 'I'm not a robot' (with a CAPTCHA logo)
- Submit button

Alternatively you can email the PensionSync support team at support@pensionsync.com, or contact your payroll software provider for assistance.

Aviva Life & Pensions UK Limited.
Registered in England No.3253947. Registered Office: Aviva, Wellington Row, York, YO90 1WR.
Authorised & regulated by the Financial Conduct Authority & the Prudential Regulation Authority.
Member of the Association of British Insurers. Firm Reference Number 185896.

[aviva.co.uk](https://www.aviva.co.uk)

BS 011 92 10/2021 © Aviva plc

