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Guide to working with Aviva

via **PensionSync**



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Open an account with Aviva

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

In order to get the best rates from Aviva, you must be a pensionsync account holder before applying to Aviva for a scheme. To get the rates click on Aviva's link within pensionsync and apply for a pension with 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 may have access to the scheme management tool, which provides a dashboard of all your schemes in one 'easy to manage' area. Please check with your payroll software provider.

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. Although the scheme cannot be completed in pensionsync, this may secure a better deal for you. 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 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 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](#).

AVIVA

MyAvivaBusiness

Username

Remember my username

Password

Login

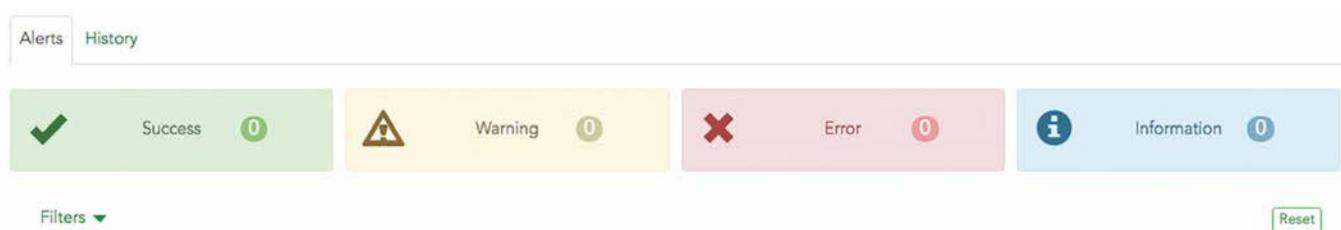
Having trouble logging in?

By accessing MyAvivaBusiness you agree to our [Terms of use](#).

[Terms of use](#) [Accessibility](#) [Privacy policy](#) [Cookie policy](#) © 2019 Aviva

Using the Alerts dashboard

We recommend you check your “Alerts” dashboard at regular intervals. pensionsync uses the “Alerts” 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. It typically takes about 30 minutes for a green alert to come through after you’ve sent your data.

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.

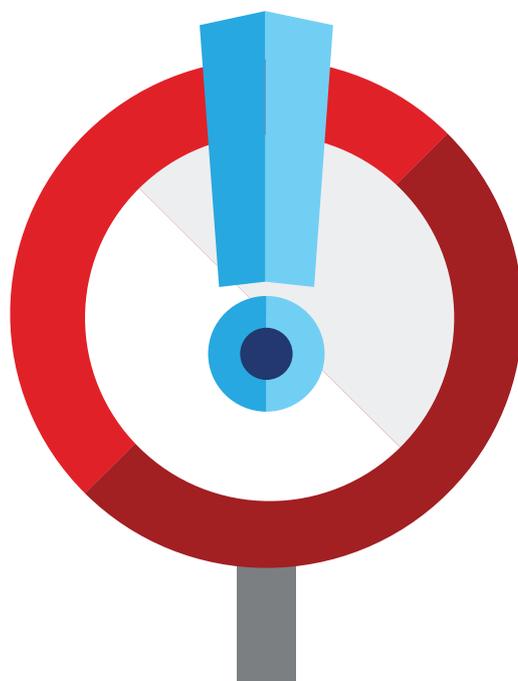
If you have submitted data, and pensionsync has taken an action such as applying an Automatic Date Match*, you will receive an alert in the yellow “Warning” tab.

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, you can also view this in the Worker Instructions section of the pensionsync scheme management tool. Worker Instructions appear as a “cogs” icon in the actions column of the dashboard.

The screenshot shows the pensionsync dashboard. At the top, there is a navigation bar with 'My Service Packs', 'Marketplace', 'Dashboard', 'New Scheme', 'Alerts', and 'Account'. Below this, there are status filters: Active (30), Draft (0), Rejected (0), Pending (0), and Inactive (0). A search bar contains 'TK011510' and a 'Search' button. The main table lists schemes with columns: Provider, Created, Company Name, Employer Id, Company Id, Status, Employer Access, and Actions. One row is visible for 'AVIVA' with 'ACTIVE' status and an 'INVITED' label. The Actions column contains a 'cogs' icon.

Clicking on worker instructions will open a new page;

The screenshot shows the 'Worker Instructions' page. It features the AVIVA logo and the company name '01230718 Joe Bloggs Company'. A 'Download Worker Instructions' button is visible. Below is a table with columns: Status, Employee Id, NINo, Forename, Surname, and Event Date. One row is highlighted in pink, showing an 'Opt-Out' event with Employee Id '00002', NINo 'AB123456D', and Event Date '01/06/2019'. A 'Details' link is next to the date.

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

Worker Instructions



01230718 Joe Bloggs Company

[Download Worker Instructions](#)

Status	Employee Id	NINo	Forename	Surname	Event Date
 Opt-Out	00002	AB123456D			01/06/2019 Details
		Ae Opt-Out Date	07/06/2019		

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
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 for the “blue” alert to confirm pensionsync’s validation has completed.
3. Check back later to see the “green” alert to confirm Aviva have processed the file.
4. If you have a “red” error message it will give you a description of the error within the “details” tab and you can amend the error in your payroll before resubmitting.
5. Aviva will email the payroll administrator when the data has been processed. You can also see confirmation that the data has been processed in the Aviva online portal.

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 in the pensionsync scheme management tool by clicking the green “calendar” icon next to the scheme on the Dashboard page:



Dashboard New Scheme Alerts **14** Account ▾

Your Groups							
Group Reference	Payment Frequency	Earning Basis	Contribution Basis	Latest Submission			
▶ Monthly 2	Monthly	Qualifying Earnings	Custom	01 May to 31 May 2019			

Submissions history for your Group Reference "Monthly 2"							
Status	Period	Total Contributions	Employer Contributions	Employee Contributions	Workers Submitted	Rejections	Last Submission
🟡	01 Jun - 30 Jun 2019	-	-	-	-	-	
🟢	01 May - 31 May 2019	£1648.38	£819.35	£829.03	5	-	14 Jun 2019 17:46
🟢	01 Apr - 30 Apr 2019	£1648.38	£819.35	£829.03	5	-	14 Jun 2019 17:35
🟢	01 Mar - 31 Mar 2019	£1648.38	£819.35	£829.03	5	-	14 Jun 2019 17:23
🟢	01 Feb - 28 Feb 2019	£1648.38	£819.35	£829.03	5	-	14 Jun 2019 17:10
🟢	01 Jan - 31 Jan 2019	£1648.38	£819.35	£829.03	5	-	14 Jun 2019 16:56

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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 -

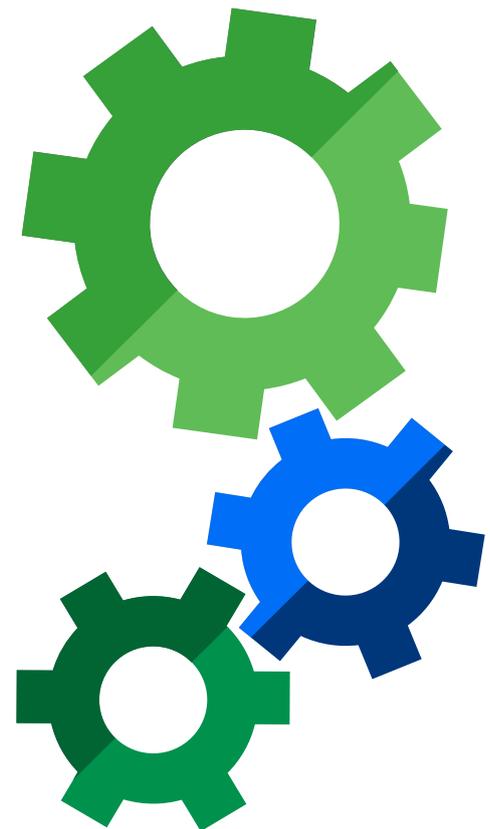
Ensure you have entered all applicable identifiers into your payroll software. Aviva allocate a Scheme Number for the scheme and a Category Number for each category within the scheme. If there is only one category, the Scheme Number and Category Number will be the same.

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.

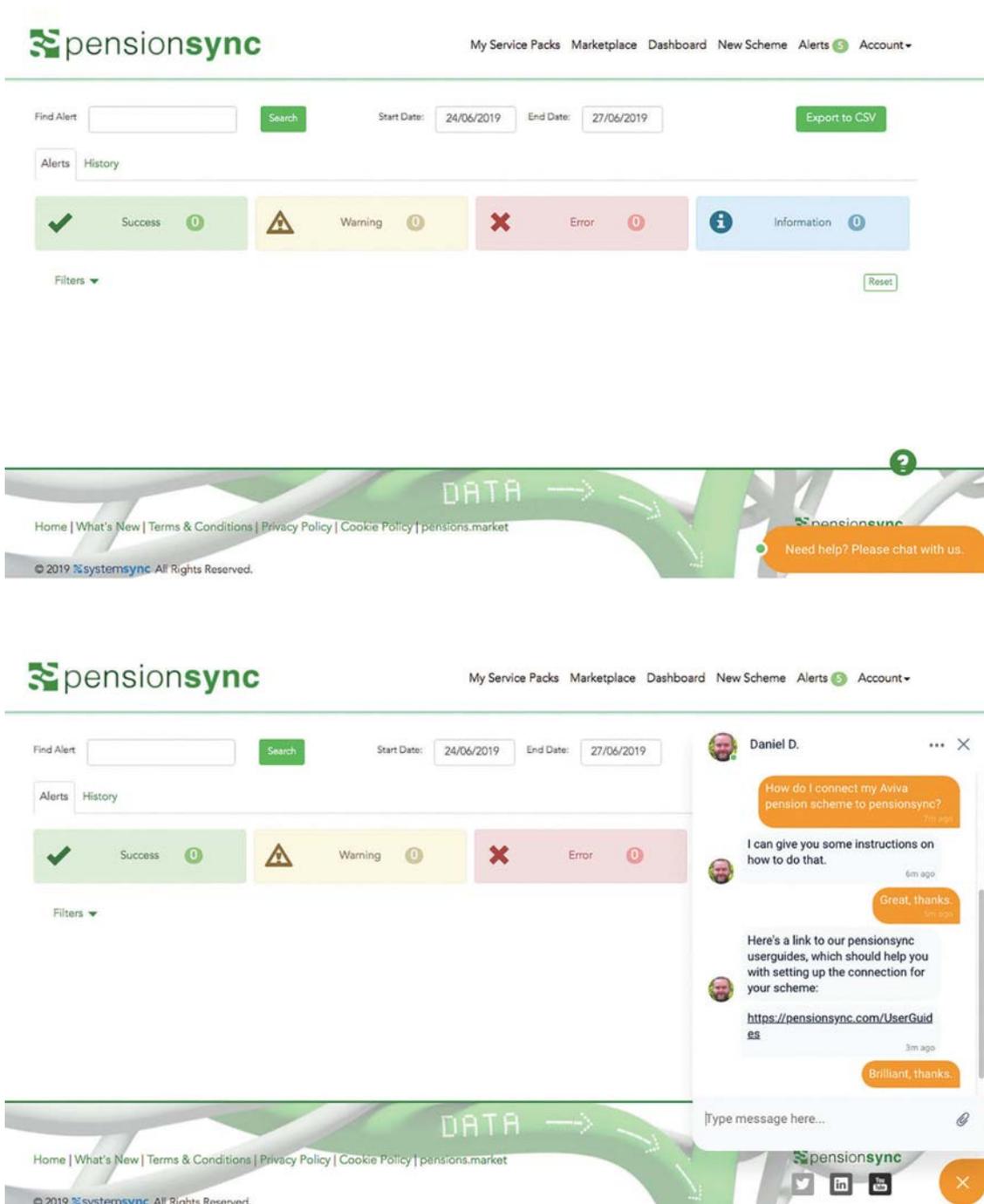


Need help?

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

Live webchat

Depending on the software you use and the pensionsync package you have access to, you may be able to access live webchat on the scheme management tool. Simply enter your name and email address to start your chat.



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

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