E-File Pension Data to NEST

User Guidelines

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About this Guidance

This guidance document will provide you with the detailed procedures regarding e-Filing your auto enrolment pension data to NEST. This guidance document details how you can carry out all the AE related tasks you will encounter using our payroll service, such as creating a pension scheme, setting up your e-filing credentials, e-Filing to NEST etc. Apart from the well-explained steps with Road-maps, screenshots are also included in the guidance for your better understanding about the process.

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Setup NEST Pension

Pension data submission has become more simple and less time consuming using our internet payroll application. We provide you the facility to directly e-file your AE pension data to NEST from our payroll application.

For a better understanding about how to make use of this feature, please follow the step by step guide given below.

STEP 1 : Create NEST account on NEST portal

To do the e-filing to the NEST, you need to sign up and create an account with NEST given that your pension data E-Filing to NEST will take place through NEST. Visit www.nestpensions.org.uk to create an account.

STEP 2 : Create payroll account in our application

Create payroll account in our application to do the e-filing to the NEST. After successfully created the account, Log in to the Account and add client(s) to the system. You can either add new client(s) manually or upload client data spreadsheet. If using the spreadsheet method please ensure all mandatory fields are filled in.

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Road Map :

Home → Manage Clients

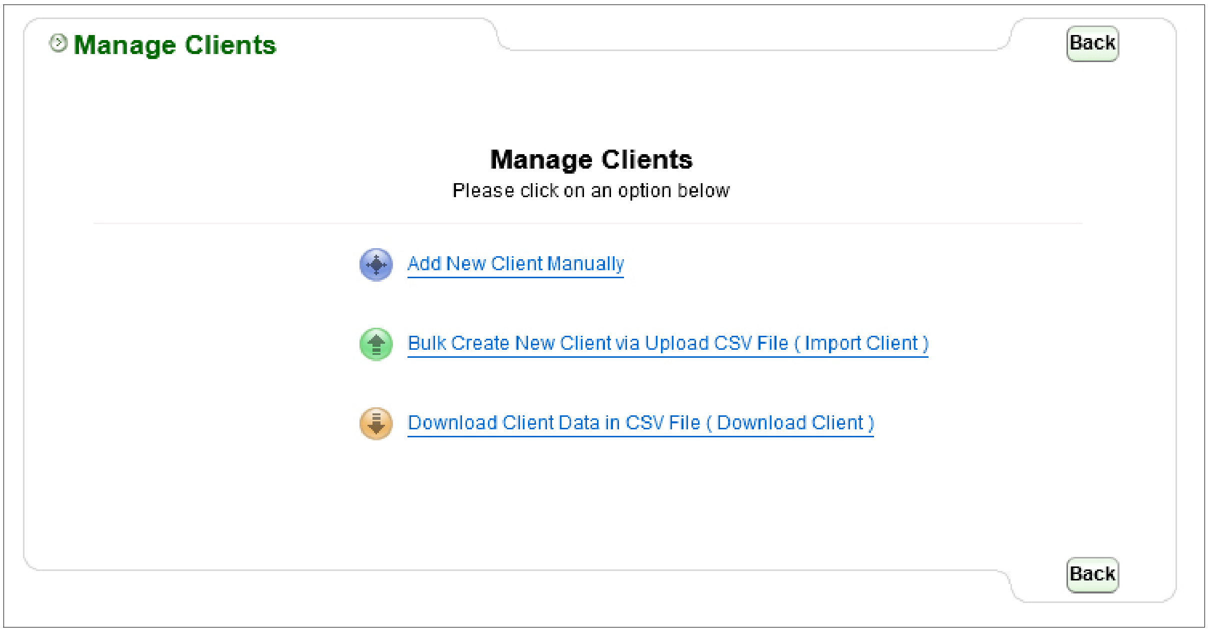

Figure.2.1

STEP 3 : Setup pension scheme in to your payroll account

If you are bureau user, you have to add a client, then you need to setup a pension scheme for that specific client. Please follow the below procedure to setup a pension scheme for client as well as for payroll user.

Action 1 : Click on 'Auto Enrolment Pension AE Setup' under 'Pension' menu in the Tasking zone at the top.

Action 2 : Click on 'NEST' from the list of pension providers.

Action 3 : Click on 'Additional AE Pension Settings' , Further click on 'Add New Pension Scheme' button. Enter all mandatory fields. **'NEST Employer Reference' value in Payroll should match with 'NEST Employer ID' is given in NEST Pension account.**

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Figure 3.1

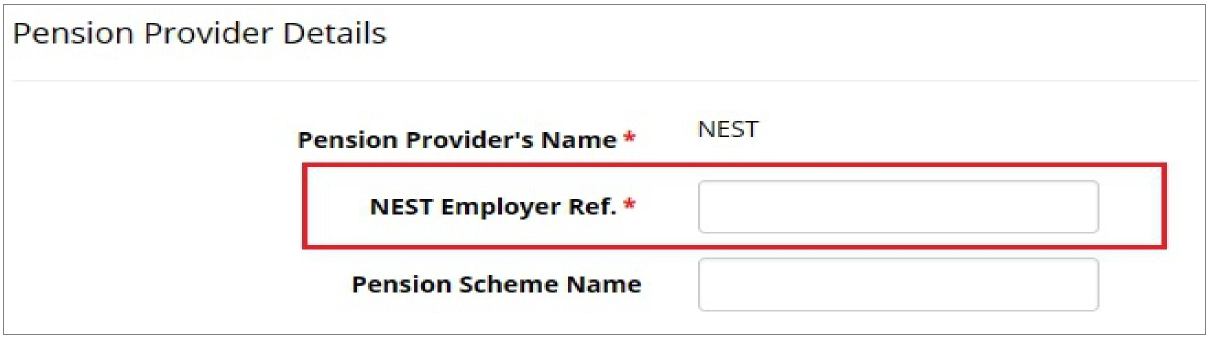

Figure 3.2

Action 4 : Enter **Group Ref.** under pension scheme details section in our application. It is important that the information entered in this field matches the information shown in your NEST pension online account. **Please Note: Group Ref in your payroll account should match the Group Name in your NEST pension account.**

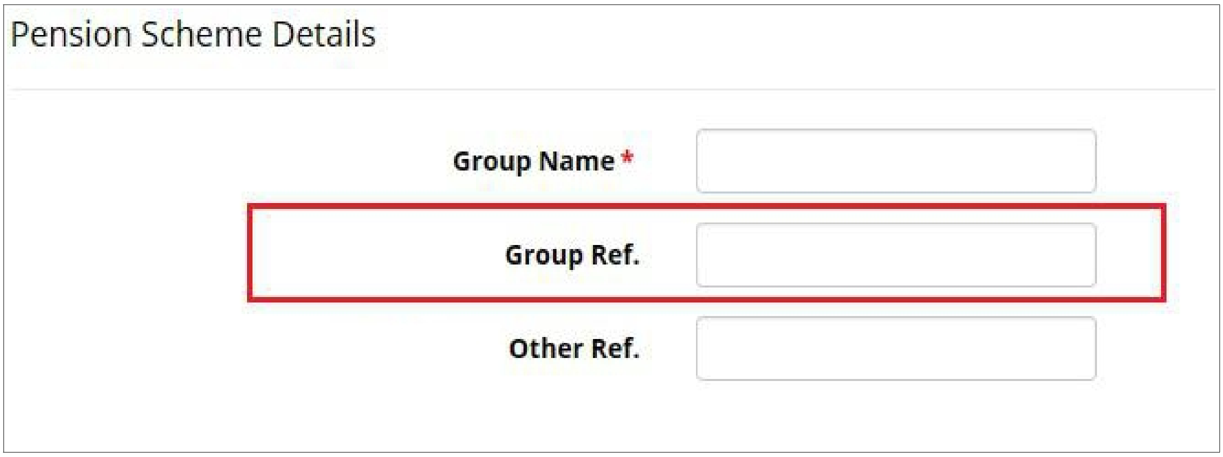

Figure 3.3

Action 5 : Enter in the information required, all mandatory fields must be filled, click 'Save

[**Please Note :** Ensure that the 'NEST Employer Reference' and the 'Group Ref.' are correctly entered mirroring the setup for your NEST Pension account. 'NEST Employer Reference' is the Employer Reference given by NEST Pension.]

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STEP 4 : Setup e-filing credentials

To enable E-Filing you will need to setup the NEST e-filing credentials.

Road Map : To Setup E-Filing Credentials

PENSION → Auto Enrolment Pension AE Setup → NEST → NEST E-Filing Credential Setup → Enter NEST Pension Account ID , NEST Pension Account Password → Save.

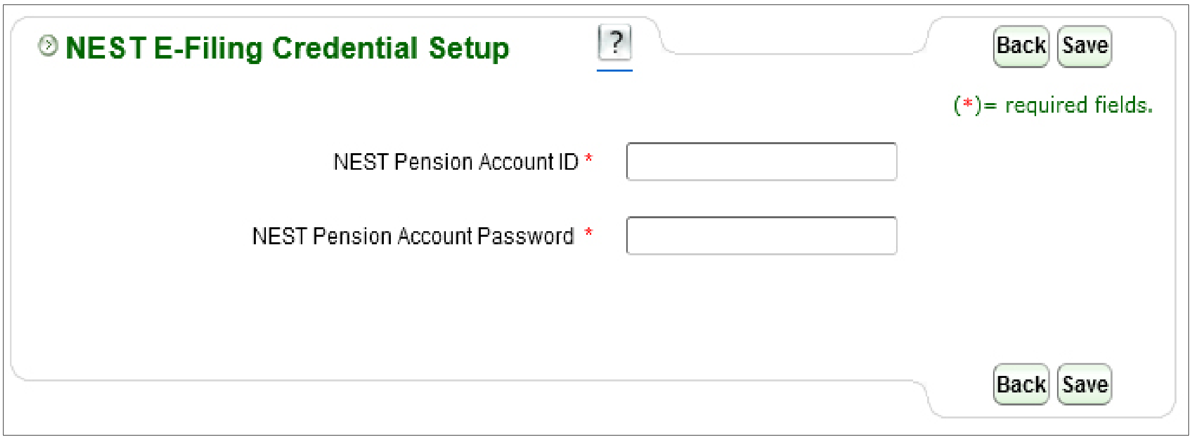

Figure 4.1

STEP 5 : Setup payment source in payroll

The Payment Source name that you entered while setting up your NEST online account should match the Employer Bank Ref. in the payroll application. Please follow the road map to check whether both the Employer Bank Ref. and Payment Source matches.

Road Map:

Employer/Setup → Employer Details → Employer Bank Details - View / Edit → Employer Bank Ref.

E-Filing pension data from payroll to NEST

Once the payrun has been completed and YTD figures have been updated, a Contribution/Enrolment report will be generated automatically (assuming that you have already staged for Auto Enrolment). You can then directly E-File the pension report to NEST. Please follow the procedure below:

STEP 1 : E-file process

Action 1 : Click on 'Pension' menu in the tasking zone.

Action 2 : Click on 'Auto Enrolment Pension (AE) Setup' sub menu.

Action 3 : Select 'AE Pension E-filing'.

Action 4 : Click on NEST 'e Submit AE Contribution' report.

Action 5 : Select 'Submission Frequency'.

Action 6 : Click on 'Continue' button and enter Sign In password, click 'Confirm' button.

Now you are provided with two options. **To 'e-file' use option 2.**

Option 1 – Download Contribution CSV file : This is the manual way of uploading which requires the user to log into their pension provider's site and upload the file.

Option 2 – E-File AE Data to NEST : Your file will be checked, and if the file passes the checks, it will then be sent to NEST.

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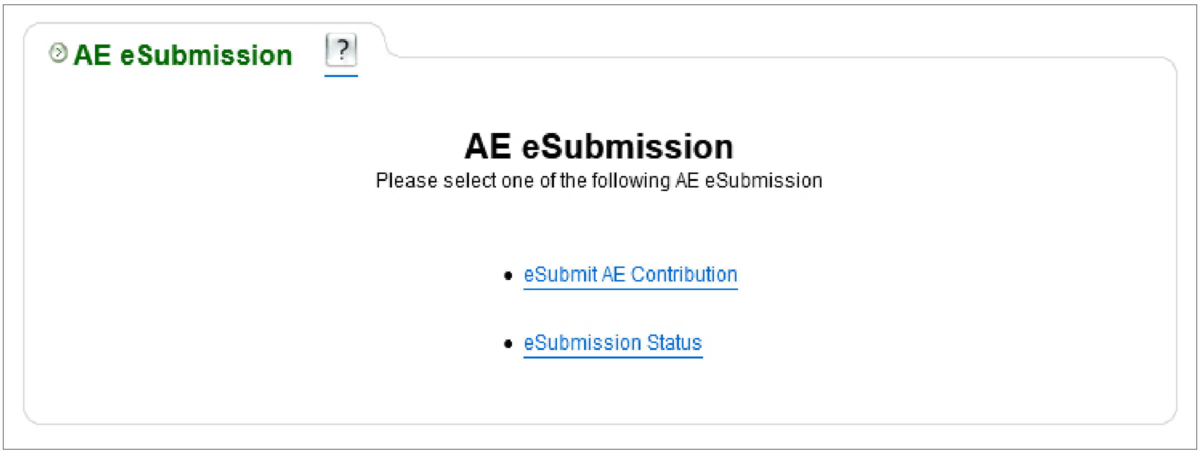

Figure 5.1

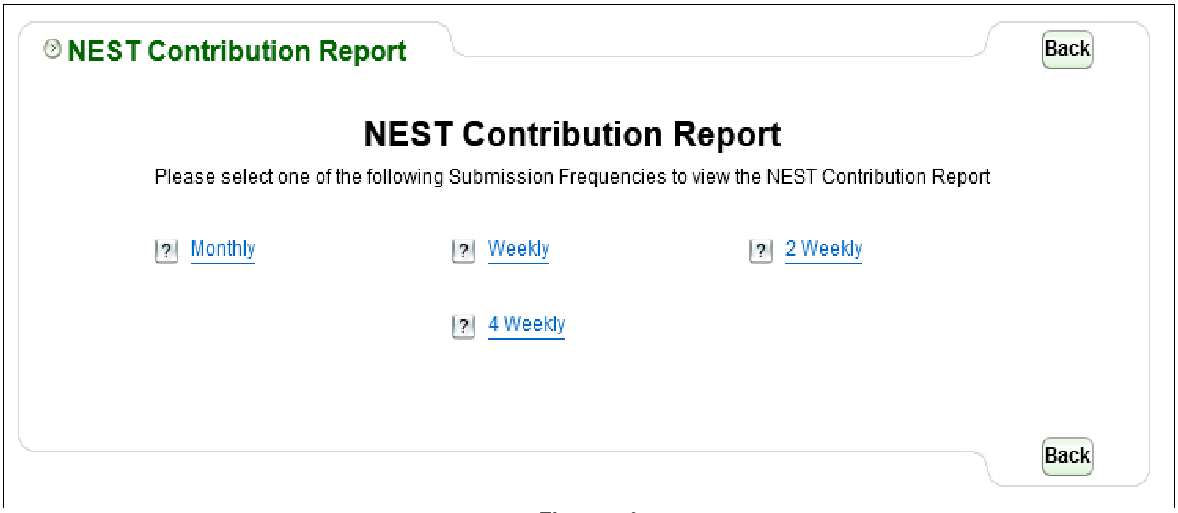

Figure 5.2

Figure 5.3

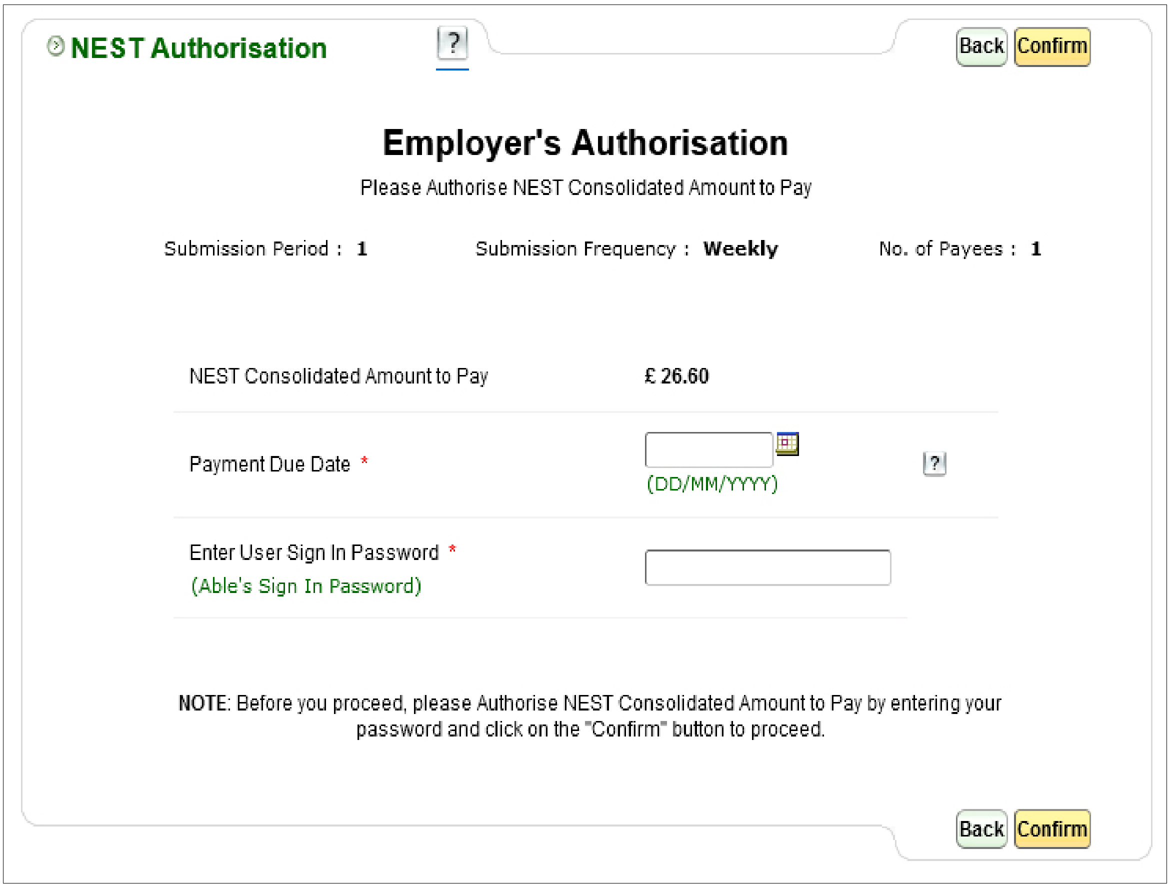

Figure 5.4

STEP 2 : NEST pension data e-filing status

Once you e-file the pension data you can get the latest E-Filing Status details , please follow the road map below.

Road Map :

Pension → Auto Enrolment Pension (AE) Setup → NEST → NEST(AE) E-Filing Status → Get Status

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