E-File Pension Data to People's Pension

User Guidelines

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About this Guidance

This guidance provides you a detailed procedure about how to e-file the auto enrolment pension data to People's Pension. This guidance details about how you can carry out all the AE related tasks such as create pension scheme, setup e-filing credentials, e-file pension data to People's Pension etc using our payroll application. Apart from the well-explained steps with Road-maps, screenshots are also included in the guidance for your better understanding about the process.

Setup People's 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 People's Pension 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 account on People's Pension portal

To do the e-filing to People's Pension, you need to sign up and create an account with People's Pension. E-Filing to People's Pension will take place through the portal.

Visit https://thepeoplespension.co.uk/ to create an account.

STEP 2 : Create payroll account in our application

Create payroll account in our application to do the e-filing pension data to People's Pension. 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.
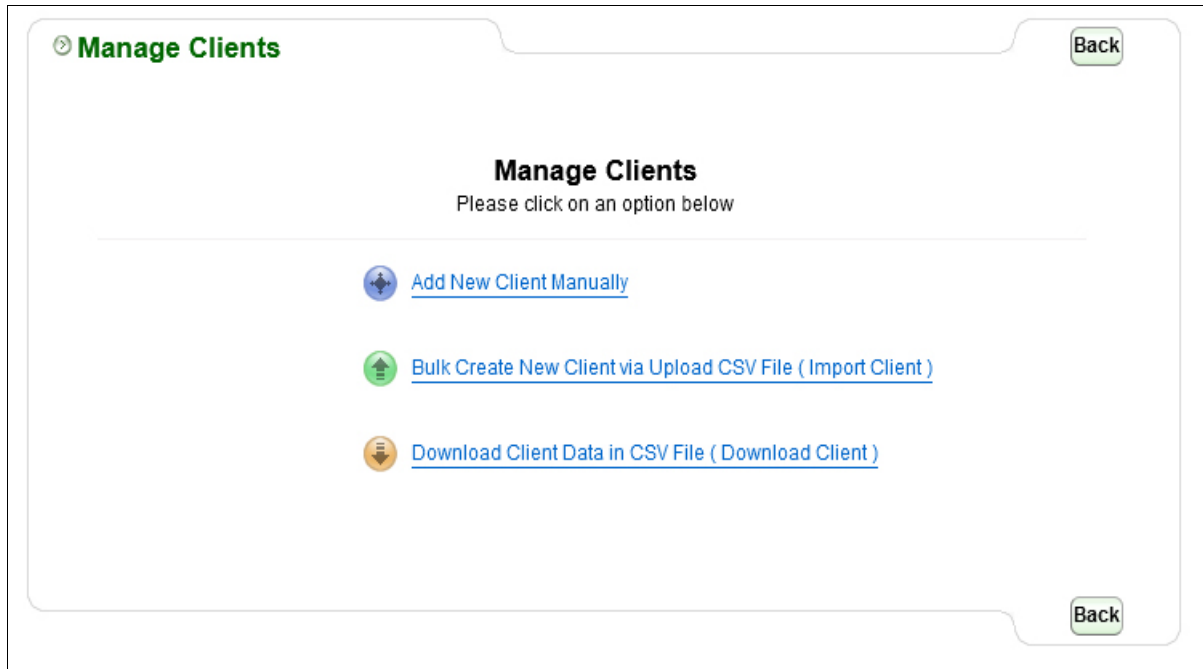
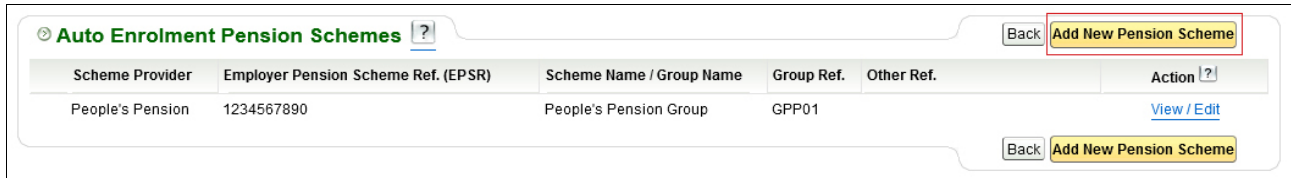**Road Map :**

Home → Manage Clients

Figure.2.1

STEP 3 : Setup pension scheme in to your payroll account

Once you have added a client, then you need to setup a pension scheme for that specific client. Please follow the below procedure to setup a pension scheme.

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

Action 2 : Click on 'People's Pension' from the list of pension providers.
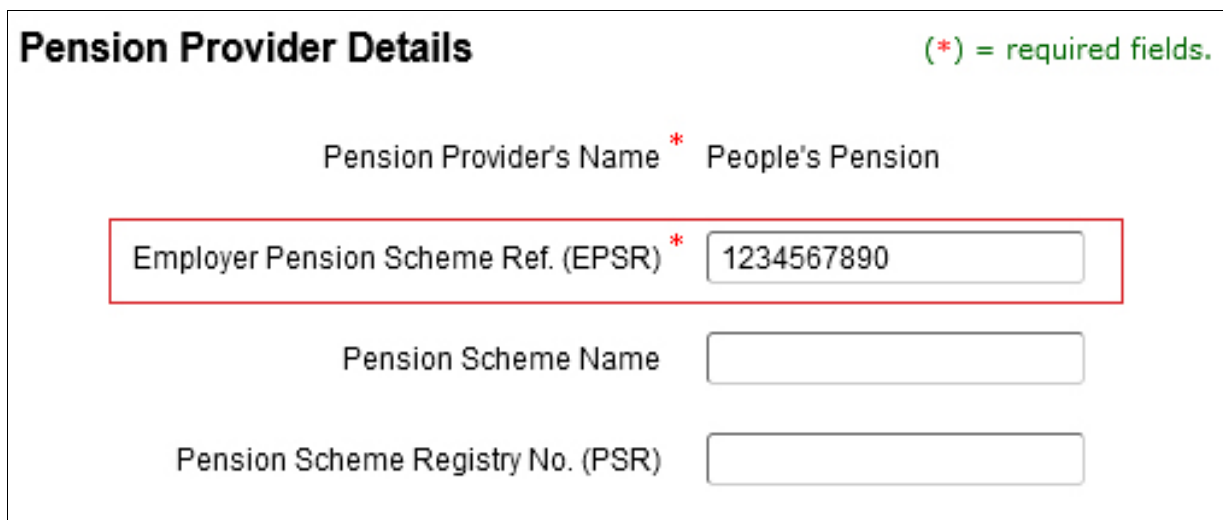
Action 3: Click on 'Additional AE Pension Settings', Further click on 'Add New Pension Scheme' button. Enter Staging Date and the 'Employer Pension Scheme Ref. (EPSR) ' **(Ensure that you enter the Employer Pension Scheme Ref. (EPSR) given by People's Pension in the 'Employer Pension Scheme Ref. (EPSR)' field in payroll.)**

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 People's Pension online account.

Figure 3.3

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

STEP 4 : Setup e-filing credentials

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

Please Note: Before setting up the e-filing credentials in your payroll account, You have to proceed for Pension Authorisation in People's Pension portal. Please follow the steps below.

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

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

Action 3: Click on 'People's E-Filing Credential Setup'.

Action 4: Click on the link 'Proceed for Pension Authorisation' new window pop-up, enter People's Pension Sign In details correctly. You will require your Pension provider credentials to complete the Authorisation process on their website. After successfully finishing the steps on their website, you will be taken back to continue with your E-filing related tasks

Figure 4.1

Figure 4.2

E-Filing pension data from payroll to People's Pension

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

STEP 1 : E-File process

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

Action 2 : Select 'AE Pension E-filing'.

Action 3 : Click on 'People's Pension' link.

Action 4 : Click on 'eSubmit AE Contribution' link.

Action 5 : Select 'Submission Frequency'.

Action 6: Select the 'Pay Period' then click on 'Continue' button.

Action 7: Enter 'Sign In password', Further Click on 'E-file to People's Pension' button.

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

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

Option 2 – E-File to People's Pension : Your file will be checked, and if the file passes the checks, it will be sent to People's Pension.

STEP 2 : People's Pension data e-filed 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 → People's Pension → People's E-Filed Status → Get Status