

E-File Pension Data to Smart 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 Smart 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 Smart 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 Smart 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 Smart 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 Smart account on Smart portal

To do the e-filing to SMART pension, you need to sign up and create an account with Smart.

E-Filing to Smart Pension will take place through Smart. Visit <https://www.smartpension.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 SMART. 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

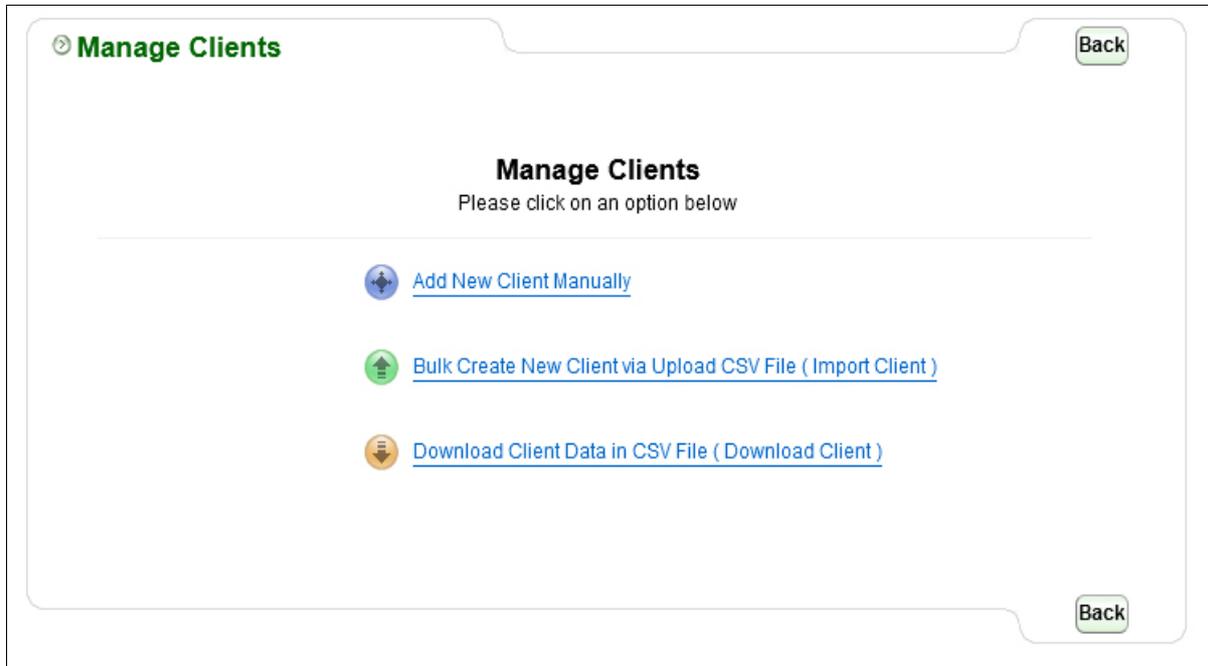


Figure.2.1

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 'Smart 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 'Company ID ' (**Ensure that you enter the Company ID given by Smart Pension in the 'Company ID' field in payroll.**) Click on 'Save' button.



Figure 3.1

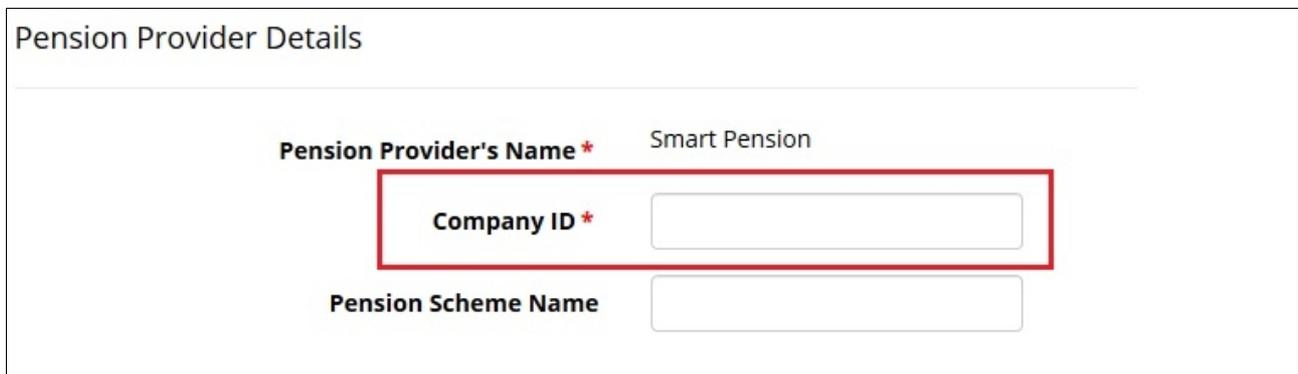


Figure 3.2

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 smart pension online account.

Pension Scheme Details (*) = required fields.

Group Name *

Group Ref. *

Other Ref.

Figure 3.3

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

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 SMART 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 'Smart Pension'.

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

Action 4: Click on the link 'Proceed for Pension Authorisation' new window pop-up, enter Smart 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

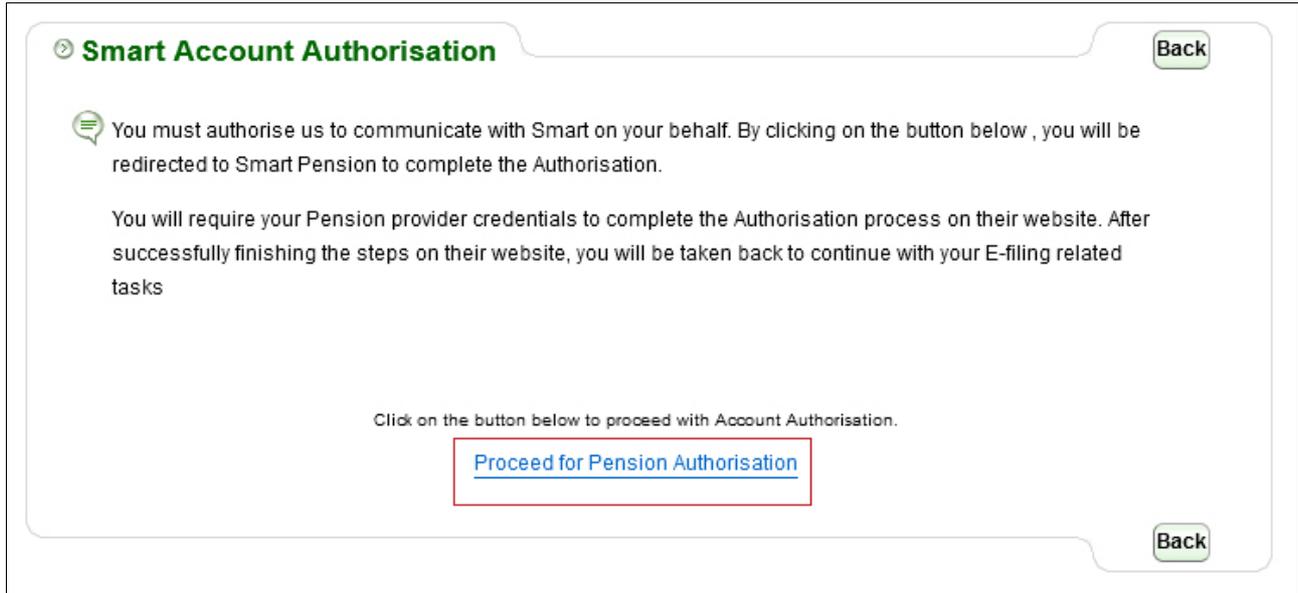


Figure 4.1

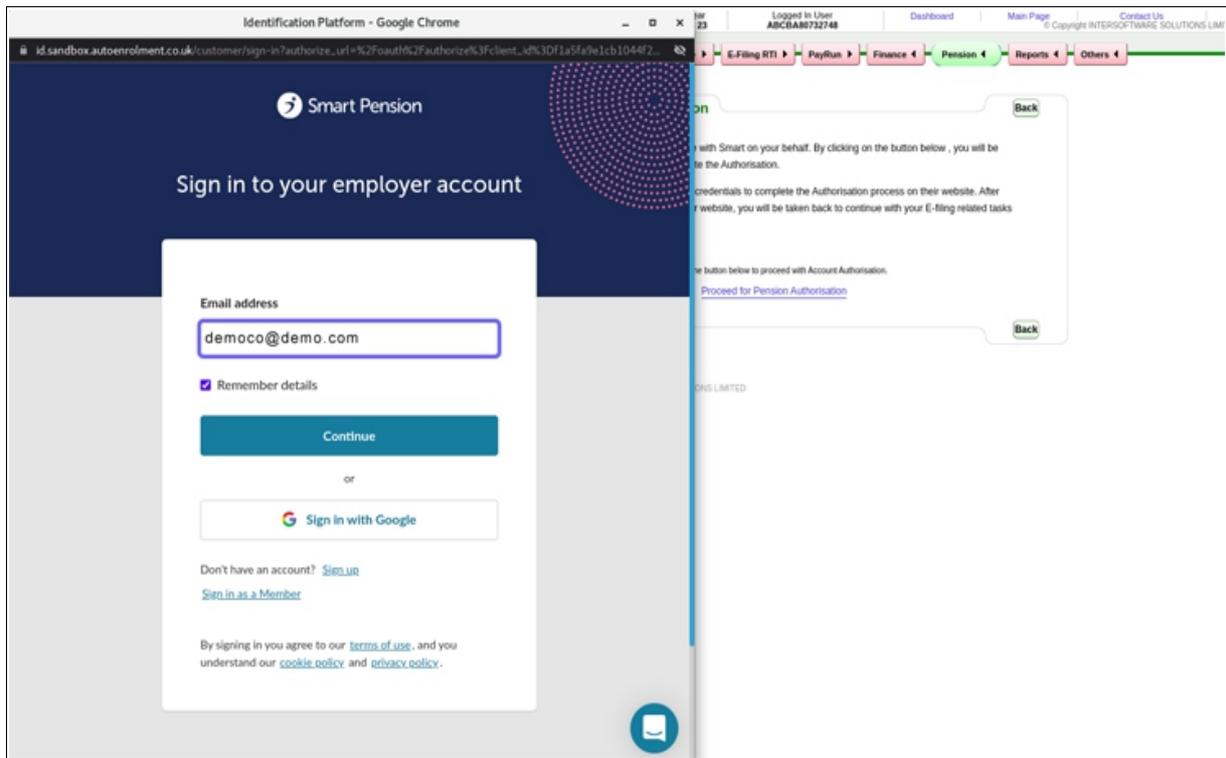


Figure 4.2

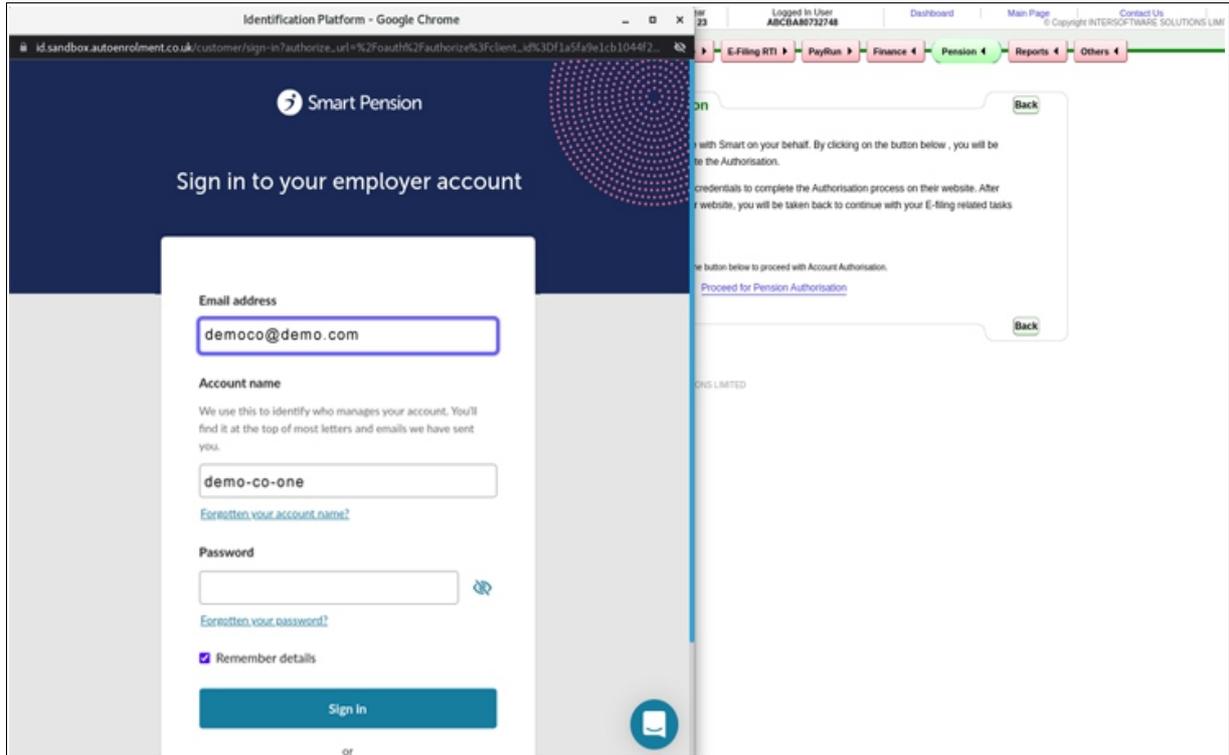


Figure 4.3

E-Filing pension data from payroll to Smart

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 Smart. 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 :** Click on 'Auto Enrolment Pension (AE) Setup' sub menu.
- Action 3 :** Select 'AE Pension E-filing'.
- Action 4 :** Click on 'SMART Pension' link.
- Action 5 :** Click on 'eSubmit AE Contribution' link.
- Action 6 :** Select 'Submission Frequency'.
- Action 7 :** Click on 'Continue' button.
- Action 8 :** Enter 'Sign In password', Further Click on 'E-file to SMART 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 Smart : Your file will be checked, and if the file passes the checks, it will be sent to Smart Pension.

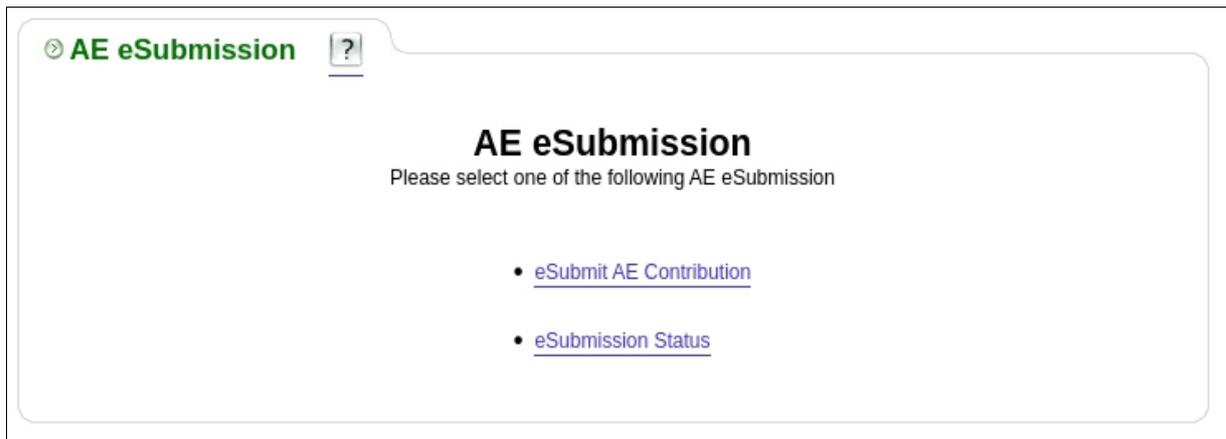


Figure 5.1

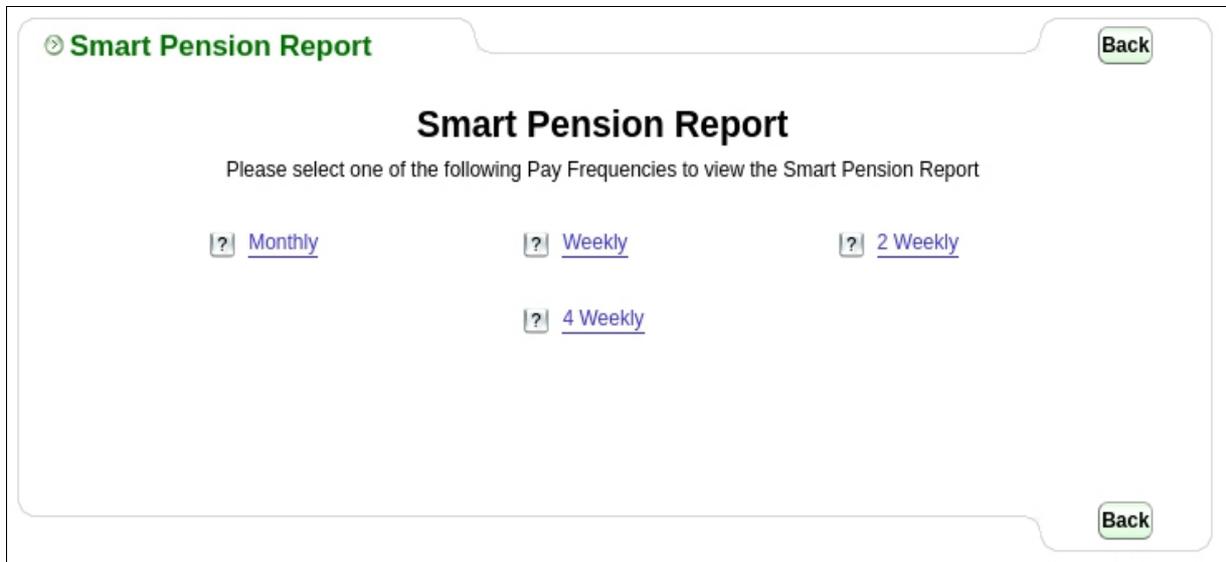


Figure 5.2

Smart Pensions Monthly Report Back Continue

Month 1 Reset if to view other pay period payment 2022 - 23
 Current Pay Period To View Pay Period Month 01 (01-04-22 to 30-04-22) Select Tax Year

Works No.	Employee Name	Pay Frequency	NINo	Pensionable earnings	Employer contribution	Employee contribution	Total contribution	Reason For Leaving
WksNo.2	Love, Tony	Monthly	AA123456C	1,480.00	44.40	74.00	118.40	

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Figure 5.3

Smart Pension Authorisation Back

Employer's Authorisation

Please Authorise Smart Pension Consolidated Amount to Pay

Submission Period : 1 Submission Frequency : **Monthly** No. of Payees : 1

Smart Pension Amount to Pay **£ 118.40**

Payment Due Date * ?
(DD/MM/YYYY)

Enter User Sign In Password *
(Able's Sign In Password)

Download Smart Pension CSV - PAPDIS v1.0 format

E-File to Smart Pension

NOTE: Before you proceed, please Authorise Smart Pension Consolidated Amount to Pay by entering your password and click on the "download" button to proceed.

Back

Figure 5.4

STEP 2 : Smart 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 → Smart Pension → Smart E-Filed Status → Get Status