E-file Pension Data via aeExchange

(For NEST,SMART and SuperTrust Users)

User Guidelines

Table of Contents

About this Guidance

This guidance provides you a detailed procedure about how to e-file the auto enrolment pension data from payroll application to the respective pension provider(through aeExchange). This user guidance details about how you can carry out the auto enrolment pension data e-filing related tasks such as create pension scheme, e-filing setup, e-file pension data to Pension Provider (through aeExchange) etc. from 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. The pension provider we are referring to in this document can be any of NEST, Smart Pension or SuperTrust (currently supported for these pension providers only).

E-file Pension Data via aeExchange

Our application now allows the users to directly e-file their AE pension data to the respective pension providers. Currently this facility is provided only for NEST, Smart Pension and SuperTrust users. If you are already using our payroll application for AE and is associated with one of these three Pension Providers, please follow the below step by step procedure to e-file AE pension data(for NEST / SuperTrust / Smart Pension users).

NOTE : It is important to first setup a pension scheme before you proceed to do any other setup. If you haven't setup any pension scheme, please click on the below FAQ link for guidance regarding how to setup pension scheme in our payroll application.

Direct FAQ link : http://faq.webpayrolltraining.co.uk/4725.htm

1. AE Pension Data E-filing

Once the Payrun has been completed and YTD figures are updated, a Contribution/Enrolment report will be generated automatically. You can then directly E-File the pension report to the respective pension provider (through aeExchange). If you have already created aeExchange account, skip STEP 1 and proceed to **STEP 2 : Authorise aeExchange within Payroll Account**

Please follow the step by step procedure below to e-file the pension contributions from payroll(through aeExchange):

STEP 1 : Sign Up with aeExchange

To e-file your pension contribution directly from our internet payroll application to the respective pension provider, you need to first setup an aeExchange account. Please follow the steps below to create an account.

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

Action 2 : Click 'AE Pension E-filing' sub menu.

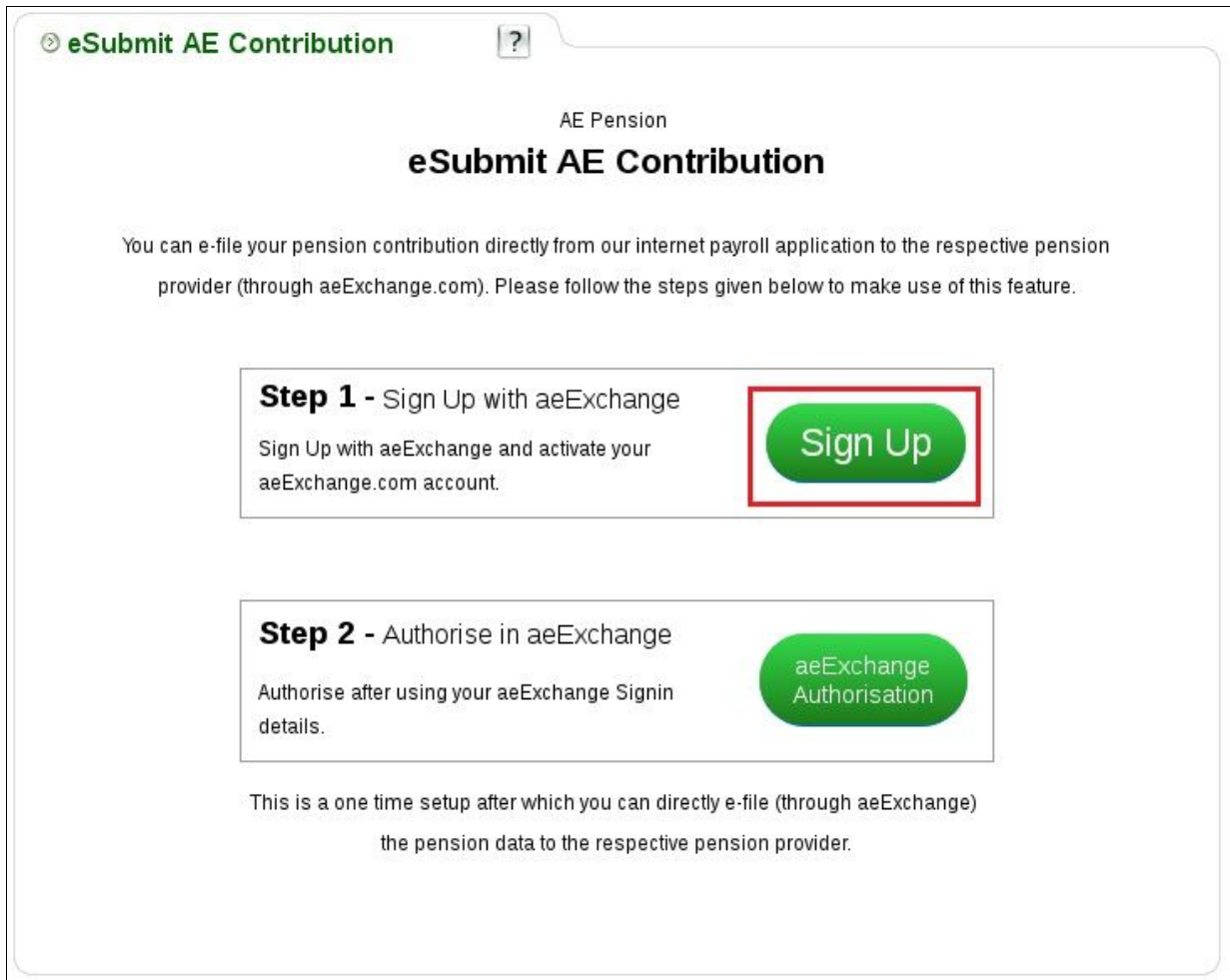**Action 3 :** Click on 'Sign Up' green button.

Figure 1. Sign Up with aeExchange

Action 4 : Enter your details and click 'Continue'. Once you submit your company details, we will send you an activation email containing a User ID and an activation link to your e-mail address. You can't change your user ID. It will remain the same.

Action 5 : Now click on the link within the email and proceed to set up your sign in security details. Once you successfully create aeExchange account, the next step is to authorise the aeExchange Sign In details to enable direct e-filing from the payroll application.

Remember, never disclose your credentials to any one, as some one may misuse it. So keep it safe for your future reference.

STEP 2 : Authorise aeExchange within Payroll Account

To enable e-filing (through aeExchange), you need to authorise using your aeExchange Sign In credentials. This is a one time setup, after which you can e-file the pension data directly to the pension provider.

The setup process is similar for all the three pension providers. Please follow the procedure below :

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

Action 2 : Click 'AE Pension E-filing' sub menu and select the pension provider.

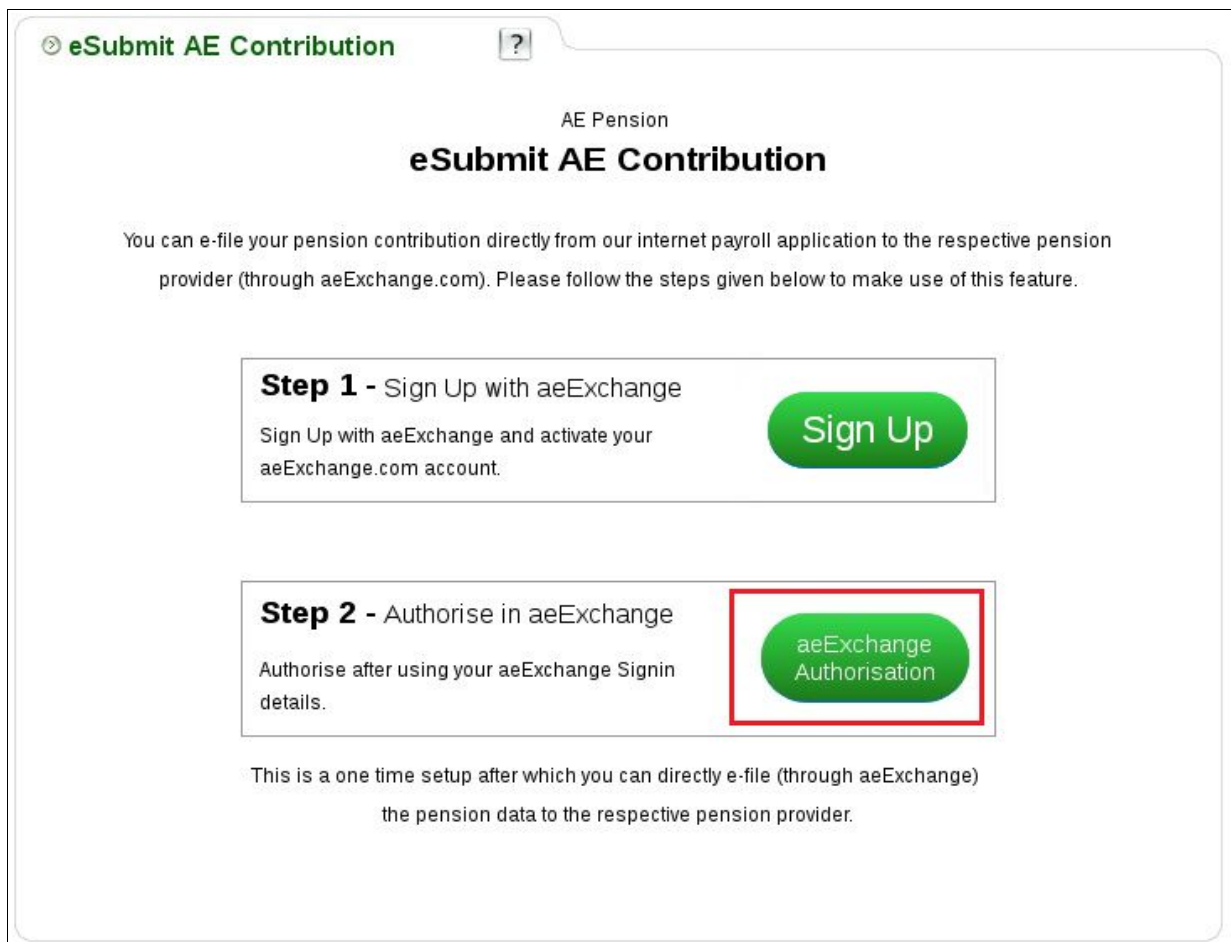**Action 3 :** Click on 'aeExchange Authorisation' green button.

Figure 2. aeExchange Authorisation

Action 4 : In the new window pop-up, enter aeExchange Sign In details correctly. After this, you will land in the 'User Authorisation' page. Click , 'Authorise' . Once the authorisation is successful the message will be displayed as shown in Figure 4.
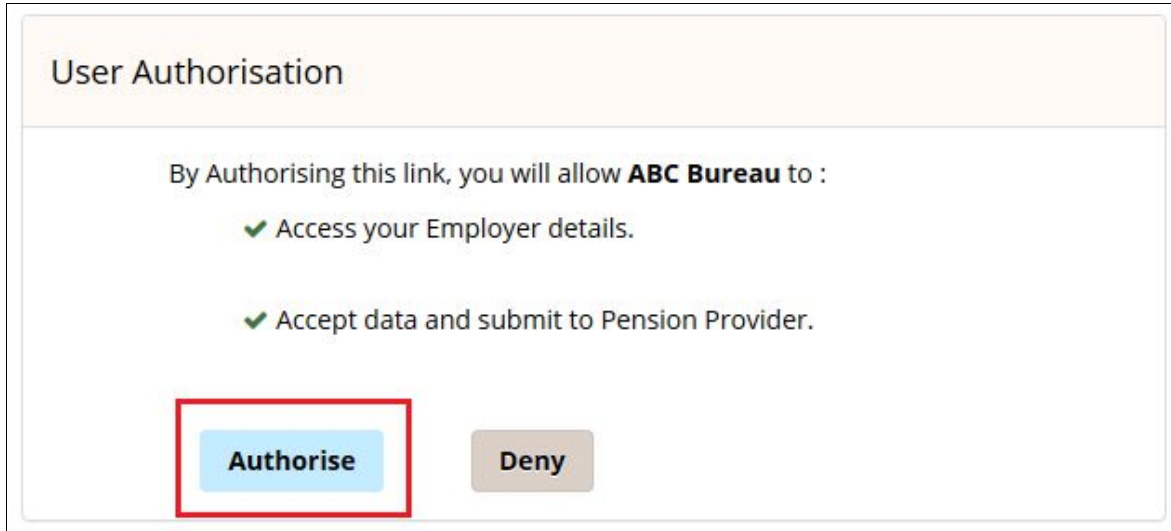

Figure 3. User Authorisation

Figure 4. Authorisation Successful

Action 5 : After successful authorisation, you can then proceed to setup pension provider credentials. Go to, *Pension → AE Pension E-filing → Select Pension Provider*. Enter your pension provider credentials(User ID and password) here. Enter your registered office address and click Save. Ensure that all mandatory fields are filled. This is a one time setup which will internally create client and pension scheme in aeExchange using API.

To setup the e-filing credentials, NEST and Supertrust users need to enter the pension provider account ID and password along with the AEX additional details. Figure 5 and 6 shows the NEST and Supertrust e-filing setup page respectively.

Figure 5. NEST E-Filing Setup

Figure 6. Supertrust E-Filing Setup

Note for Smart pension users: Enter your Smart Pension API key. The API key is a unique key which is issued by Smart Pension to each individual company/client. In case you have an Advisory account in Smart Pension , which allows you to act on behalf of your clients, you can enter your 'Advisory API Key'. **Click here to get for more information about API key from Smart Pension**

Figure 7. Smart Pension E-Filing Setup

Action 6 : If the setup process is successful, AE eSubmission page will be displayed as shown in Figure 9. There after you can directly e-file the AE pension data to the pension provider. In case of any error, an error message will be displayed as shown in Figure 8.

Figure 8. Error Message

STEP 3: E-File Pension Data

Once the aeExchange Authorisation for AE E-filing is done, pension contribution/enrolment report can be e-filed to the respective pension providers. Pension contribution/enrolment report will be automatically generated after every payrun process.

Please follow the procedure below to e-file pension data.

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

Action 2 : Click 'AE Pension E-filing' sub menu.

Action 3 : Select the pension provider.

Action 4 : Once you complete the aeExchange Authorisation, you can see the AE eSubmission screen as shown in Figure 9. Click on 'eSubmit AE Contribution' link.

Figure 9. AE eSubmission

Action 5 : Select the pension submission frequency.

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

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 Pension Provider (through aeExchange) : Your file will be checked in aeExchange, and if the file passes the checks, it will then be sent to pension provider.
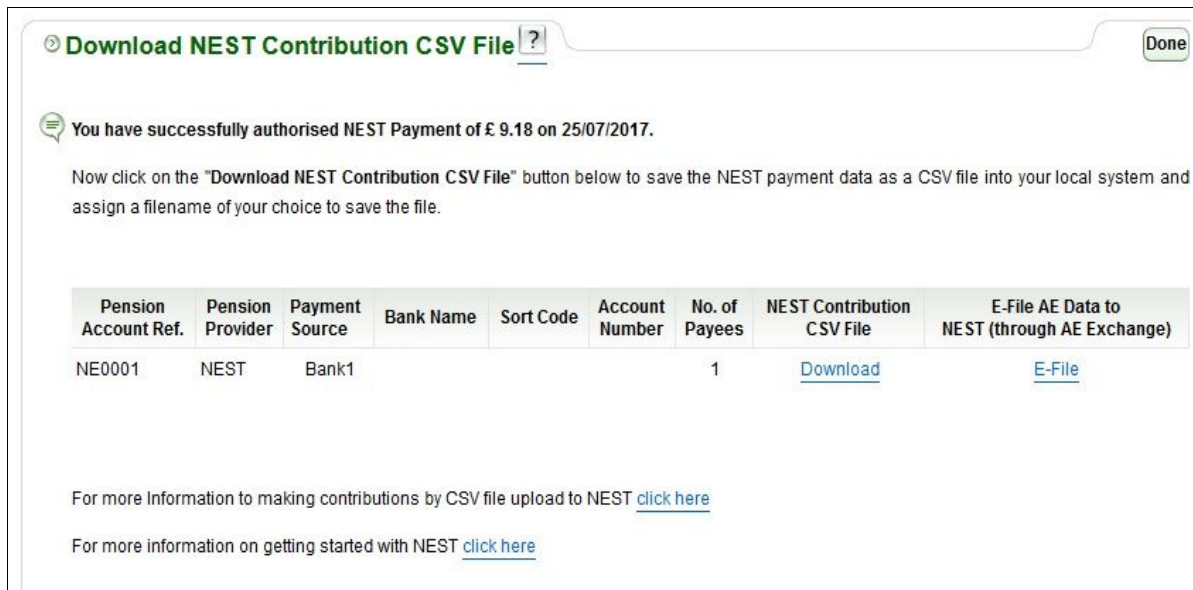

Figure 10. E-file Pension Data

STEP 4 : 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 → AE Pension E-filing → Pension Provider → eSubmission Status → Get Status

2. Note For Existing Users About Authorisation

If you are an existing user already using AE Exchange for AE E-filing, you will be prompted to complete the Authorisation procedure for security reasons. A message page will be displayed as shown in the Figure 11. Click on "Click here to authorise in aeExchange" link to complete the process. Refer **STEP 2 : Authorise aeExchange within Payroll Account.**
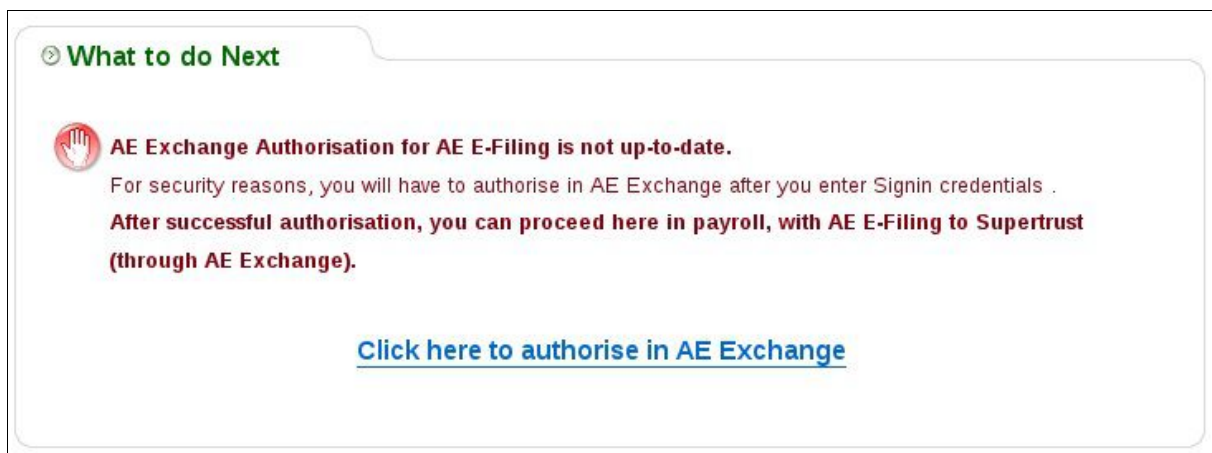

Figure 11. Authorisation message page