

Leading payroll and pensions
professionals through
education, membership
and recognition

Managing communications between payroll and pension providers

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systemsync



Membership | Qualifications | Training | Payroll Assurance Scheme
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cipp the **chartered institute**
of **payroll professionals**
leading the profession



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Managing communications between payroll and pension providers

“The art of efficient AE administration is to minimise human contact with the pension providers.”

What puts the biggest strain on relationships



BAD OR MISSING DATA

Removing the human elements

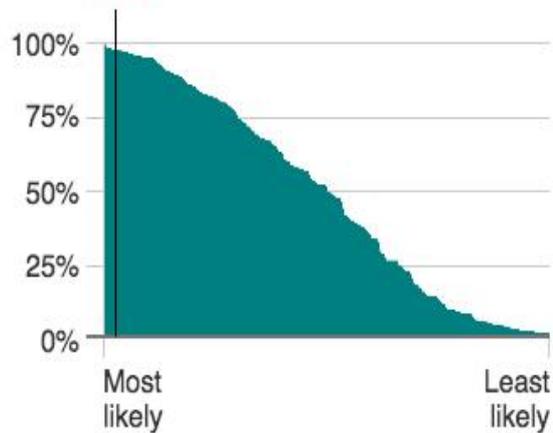


Book-keepers, payroll managers and wages clerks

Likelihood of automation?
It's quite likely (97%)

How this compares with other jobs:

8th of 366



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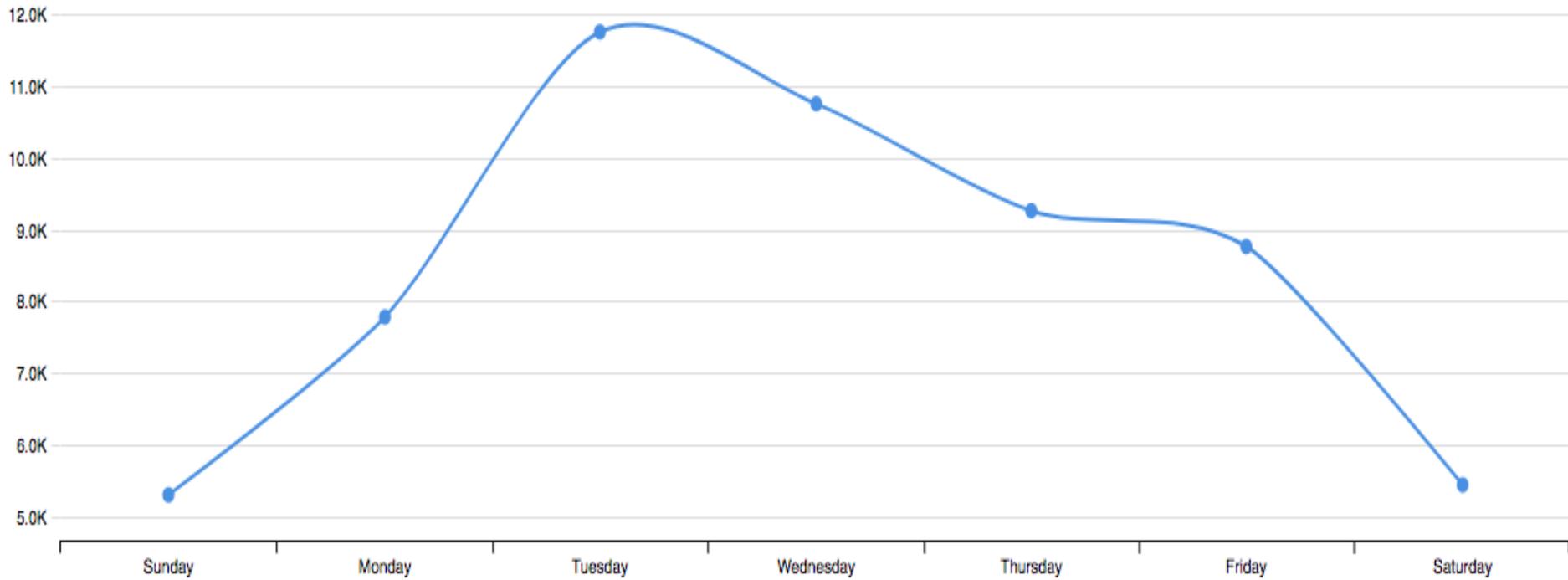


1. Practicality



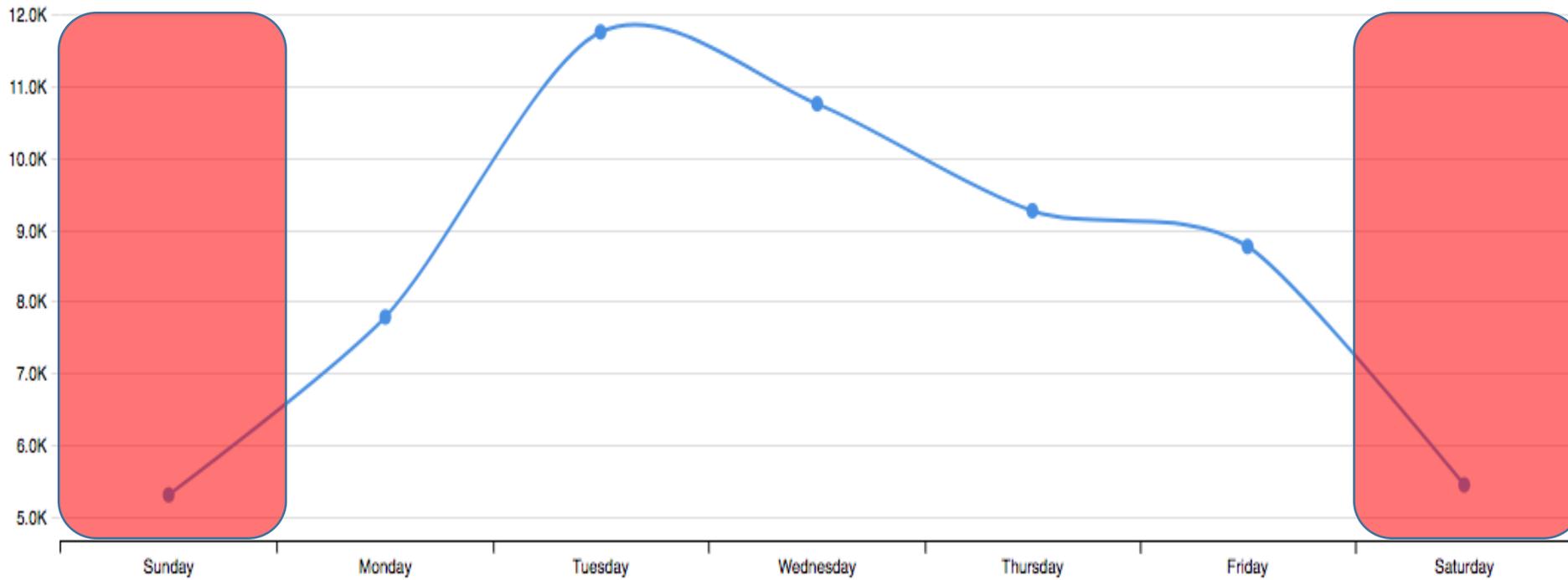
Connected API > Daily Averages

413.3K Hits ▼



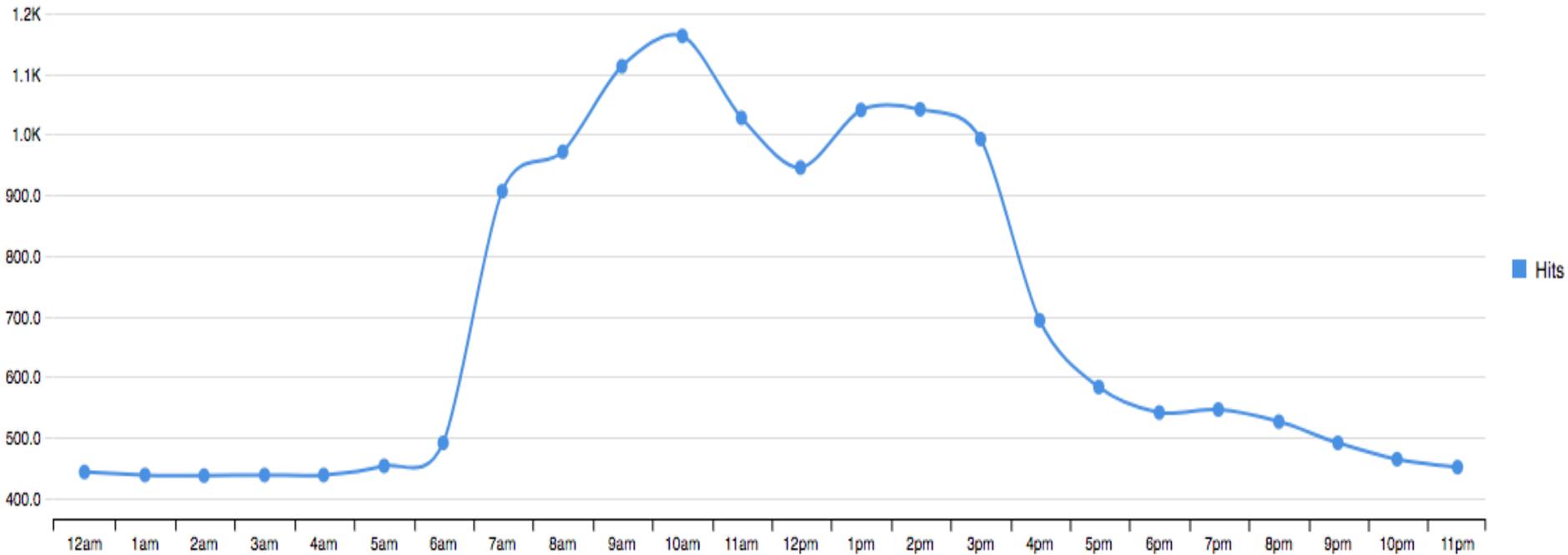
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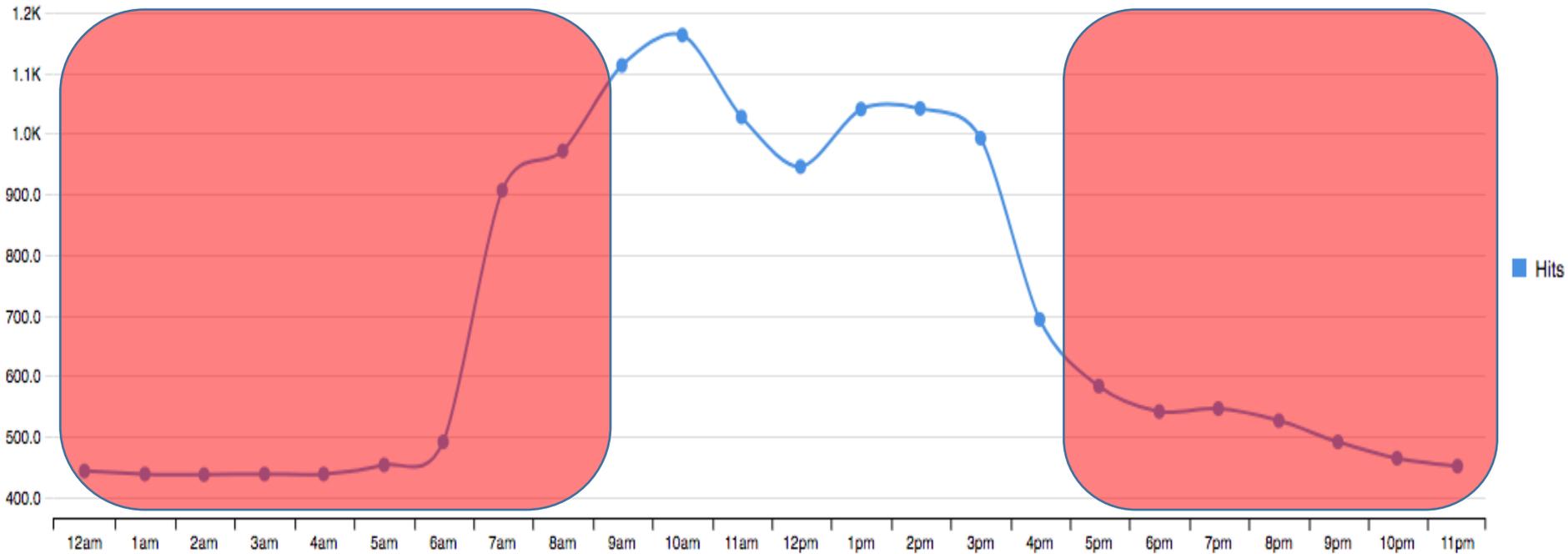
Connected API > Hourly Averages

398.8K Hits ▼

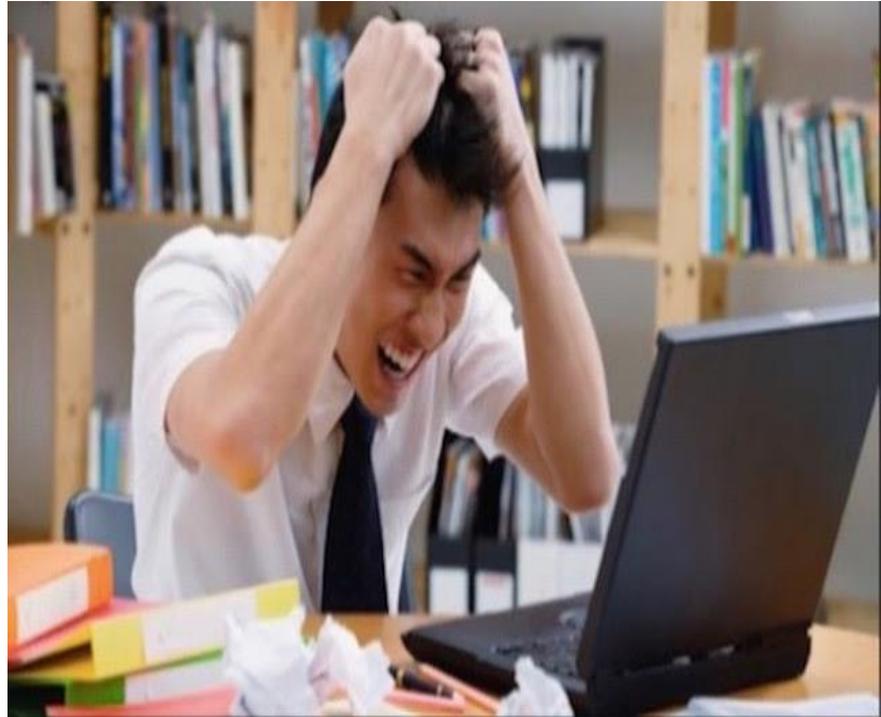


Connected API > Hourly Averages

398.8K Hits ▼



1. Practicality
2. Sanity



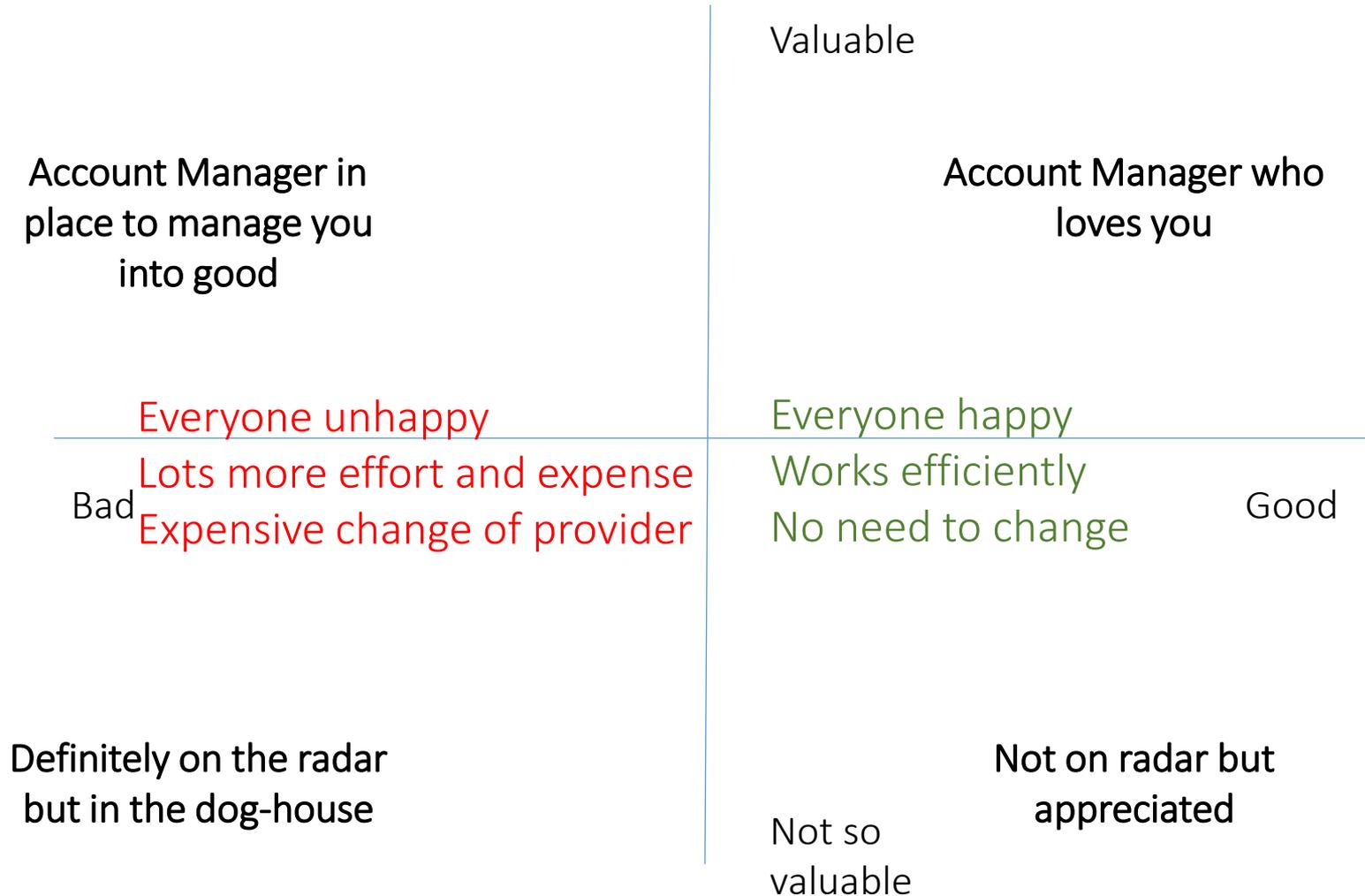


1. Practicality
2. Sanity
3. Accuracy/Efficiency

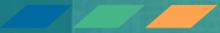
Who do pension providers really value?



1. Pension providers have thousands of employers – e.g. Nest has over 400,000
2. Pension providers love big brands (especially if they can publicly name them)
3. Pension providers want to spend their time with accountants whose large numbers of clients use their schemes
4. Pension providers love companies with large contributions and larger transfer values
5. *Pension providers love companies who they've never heard of who just send data and contributions regularly and without causing them any hassle*



Getting the
communication
process right from
the start



Setting the Scheme Up

This might involve:

- Payroll
- HR
- Adviser
- Pension Provider

Ensure that the same scheme set up details are on the pension provider and the payroll system.



Set up the pension scheme from within your payroll software – guarantees they match



Or synchronise the data in payroll for a scheme that has already been set up

Sending & retrieving data



1. Not leaving your payroll software & visiting the pension provider's website
2. Not entering your log-in details every submission
3. Sending member data without a CSV
4. Sending contribution data without a CSV
5. Contributions are automatically collected by the provider?
6. Updating opt ins/opt outs
7. Fixing errors within your payroll software



Who to contact
when it goes
wrong?



It completely depends on the scale of the error

Why?

1. The natural reaction is to rectify the wrong without working out the consequences
2. You might have the wrong cause
3. Certain people have more experience of issues than others

MAJOR ISSUES

1. Contact your Adviser (if you have one)
2. If you have a pensionsync account then contact us

THEN

3. Contact your pension provider
4. Contact your payroll software

MINOR ISSUES

1. If you have a pensionsync account then contact us
2. Any other users of your payroll software that you know
3. Contact your payroll software
4. Contact your pension provider

ANY QUESTIONS?



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