

# Pensions

DATE	VERSION	AUTHOR	PAGES
10/02/2020	1	SOPHIE ALLEN	7

## Contents

**1 - CONFIGURING YOUR PENSION PROVIDER.....3**

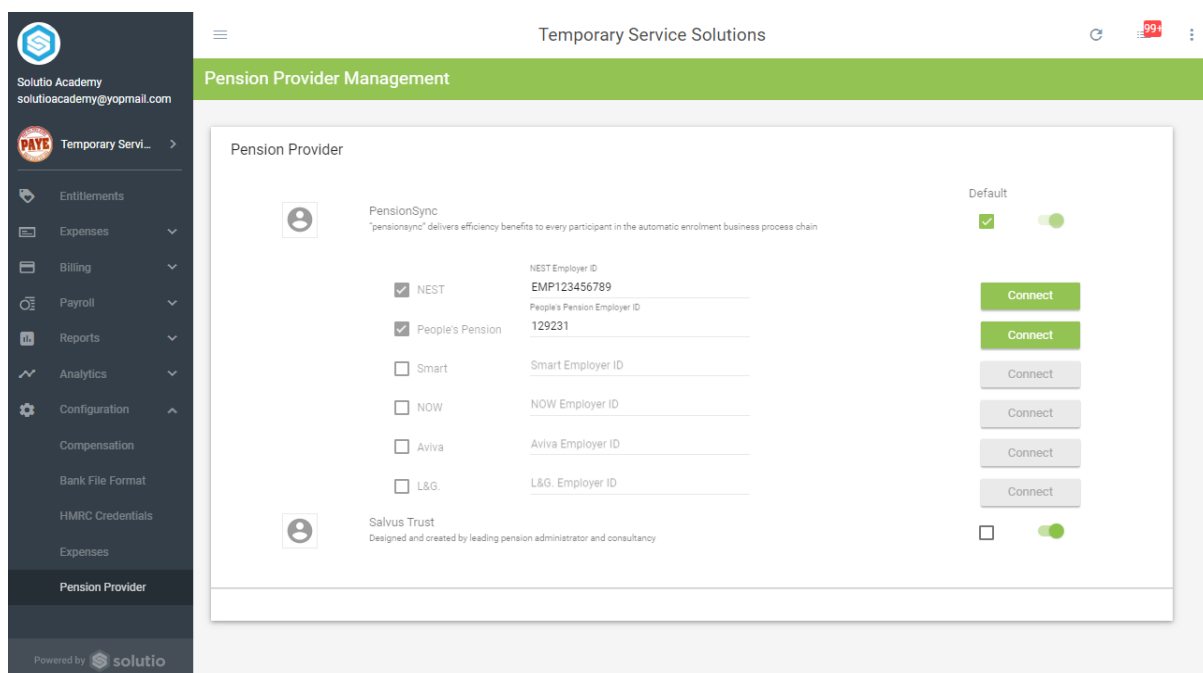
**2 - SETTING THE PENSION PROVIDER AGAINST THE WORKER.....5**

It is compulsory for employers to automatically enroll they eligible workers into a pension scheme. Both the employee and employer pay money into the scheme.

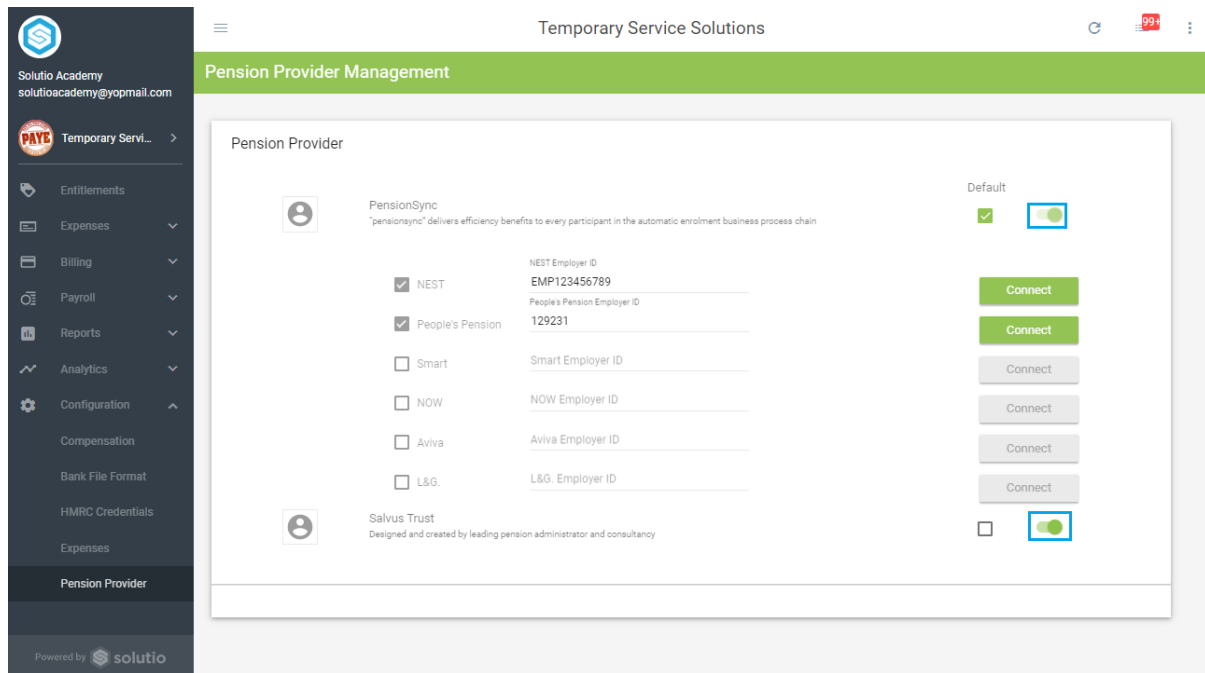
PensionSync has been integrated into Solutio to automate the majority of pension processes. It is easily set up when a contractor is set up.

## 1 – Configuring your Pension provider

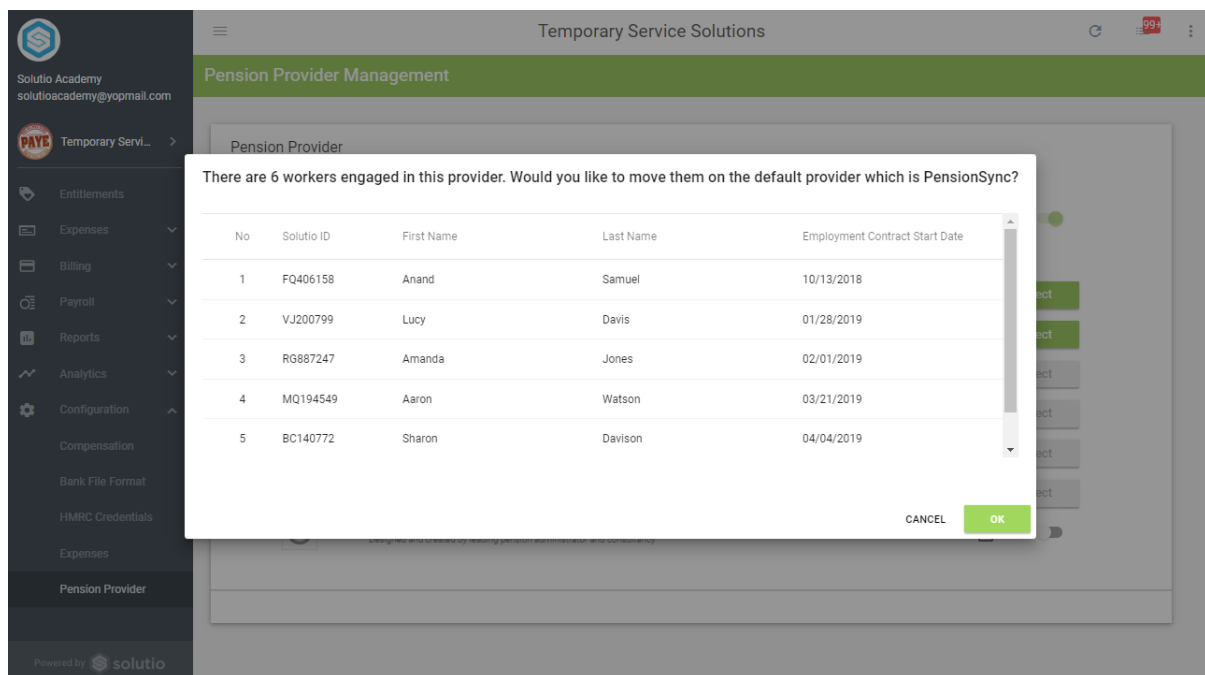
- Click configuration
- Click Pension provider



- You have two options for handling Pensions – PensionSync and Salvus Trust
- You can select your preferred Provider by clicking the Default Radio key.
- Salvus Trust simply requires you to click the tick-box
- PensionSync requires you to select which workplace pension(s) you wish to use, and provide your Employer ID
- Click default next to PensionSync
- Click the tick-box next to the workplace pension(s) you wish to use
- Click into the Employer ID field next to the workplace pension selected
- Type your employer ID
- The final feature is the switch button



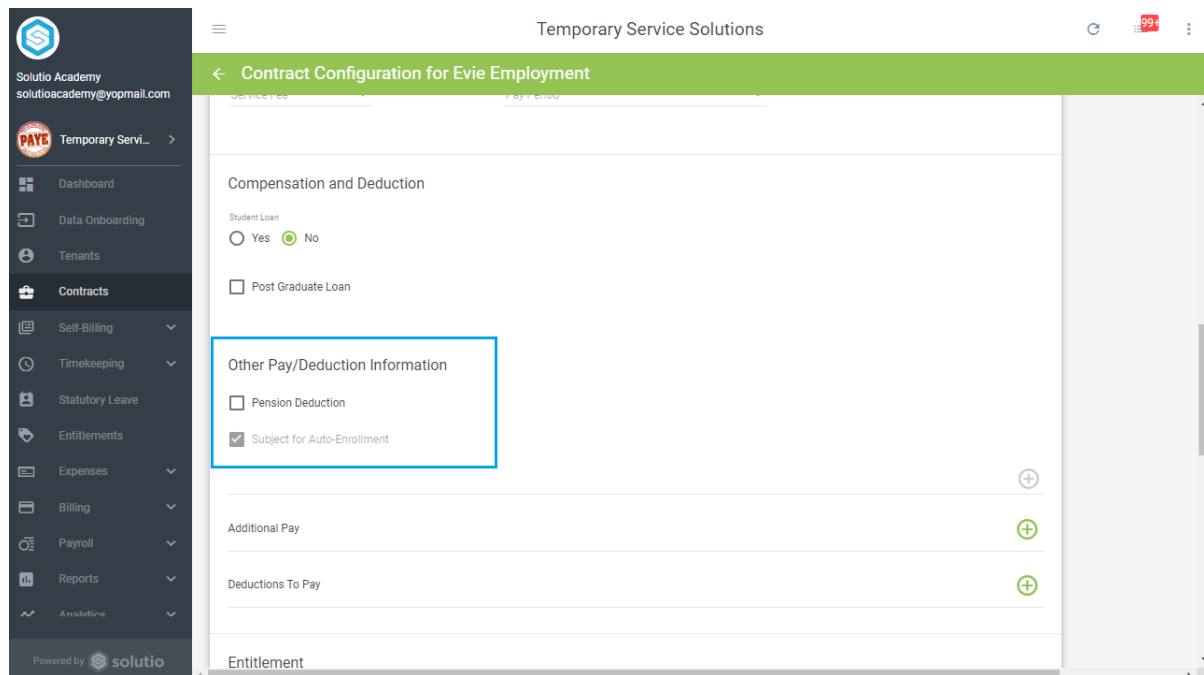
- Clicking this button will produce a pop-up that asks if you want to move any workers engaged by the provider to the default provider



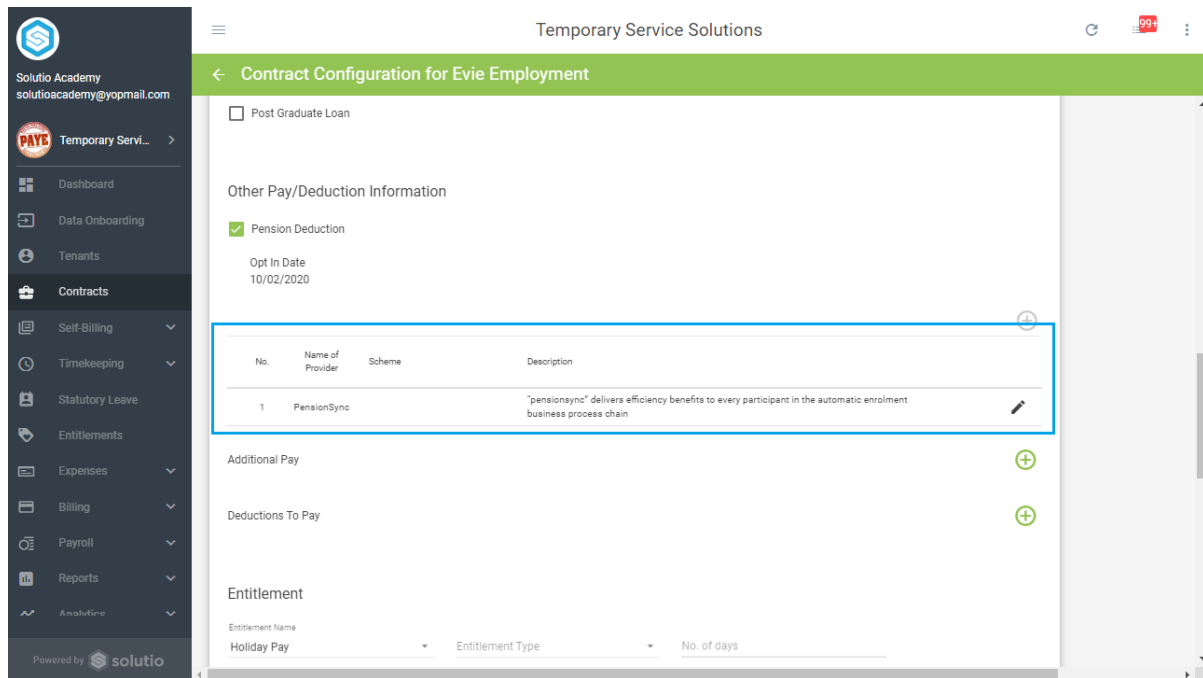
- Click OK to transfer the workers, or Cancel to cancel


## 2 – Setting the Pension Provider against the Worker

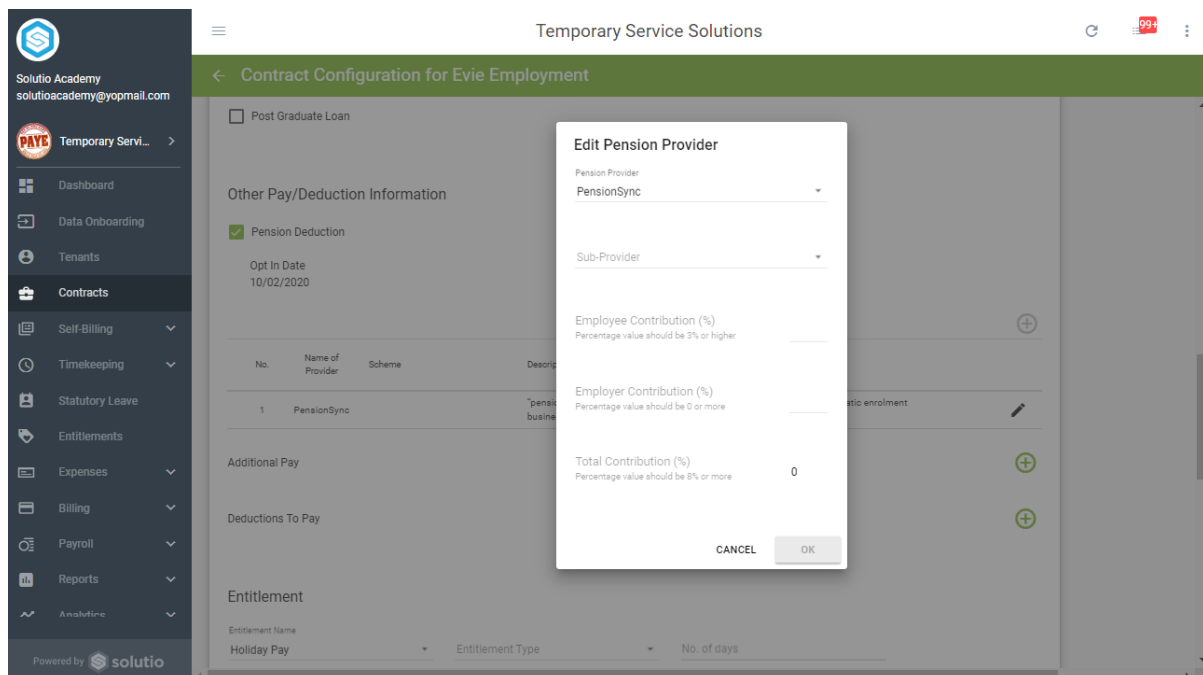
- Pensions are set for the worker on the Employment Agreement
- This can be done at set-up or edited later
- To set up the Employment Agreement, please see our Contracts guide.
- Once you've reached the Contract Configuration step, scroll down to Other Pay/Deduction information
- Pension Configuration found here



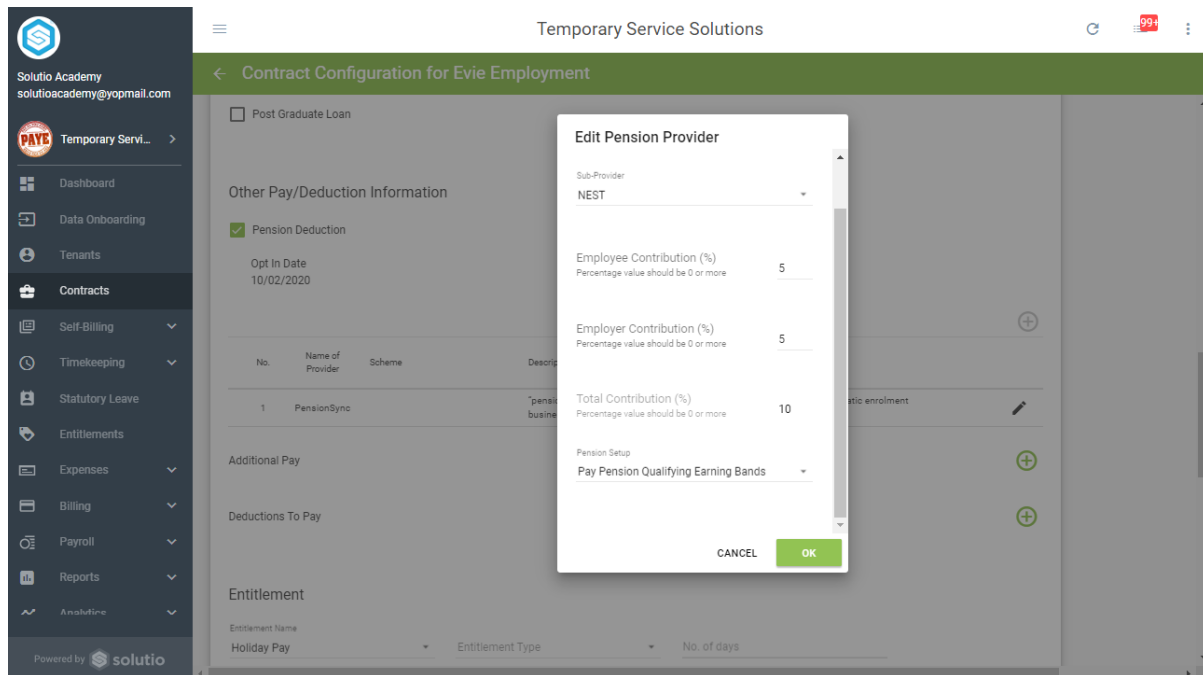
- Click the Pension Deduction tick-box
- Provider details will appear



- Click the Pencil icon 
- You will now be asked to set the Sub provider, Contribution percentages and whether the pension should be paid according to qualifying earning bands or certification



- Once all data is input, click OK



- When all other mandatory information is entered on the Contract Configuration screen, scroll down and click the Save button
- To Opt someone Out of the pension, simply untick the Pension Deduction button and save