

For employers

# Process changes for SmartEnrol employers

This short guide explains the new process.

Step 1

Step 2

Step 3

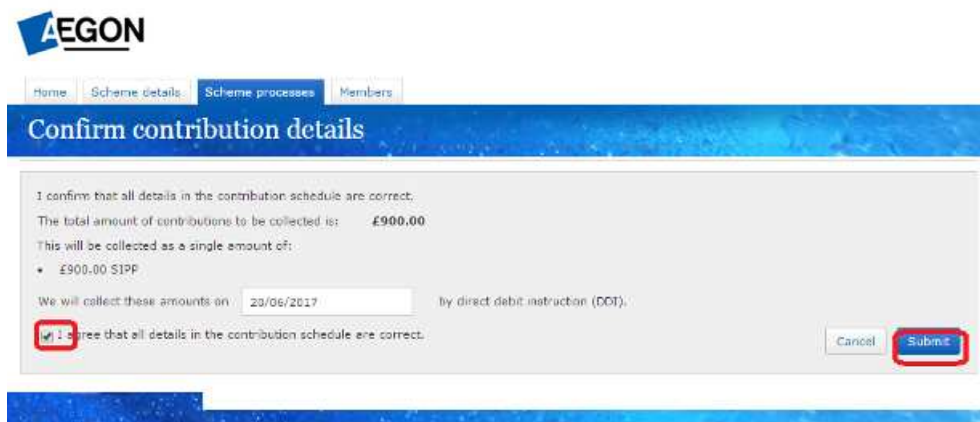
Step 4

Step 5

## Step 1:

As an employer using SmartEnrol, you'll go straight to this new look payments collection screen (example below) and an exceptions report will be generated after the process completes.

Tick to agree with payment and select **'Submit'**.



**AEGON**

Home | Scheme details | **Scheme processes** | Members

### Confirm contribution details

I confirm that all details in the contribution schedule are correct.  
The total amount of contributions to be collected is: **£900.00**  
This will be collected as a single amount of:  
• £900.00 S1PP  
We will collect these amounts on  by direct debit instruction (DDI).

I agree that all details in the contribution schedule are correct.

Step 1

Step 2

Step 3


Step 4

Step 5

## Step 2:

Confirmation provided that it's been submitted, you've completed the payment.



 Demo Account You last logged in on 09/12/2016 at 11:41:19 [Contact us](#) [Logout](#)

[Home](#) [Scheme details](#) [Scheme processes](#) [Members](#)

### Confirm contribution details

I confirm that all details in the contribution schedule are correct.

The total amount of contributions to be collected is:

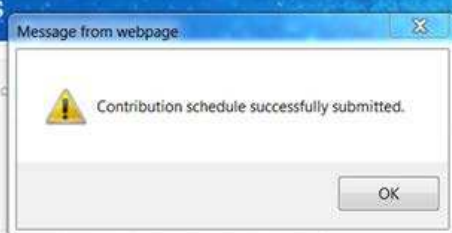
This will be collected as two separate amounts of:

- £677,000.00 SIPP
- £25,650.00 Stocks & shares ISA

We will collect these amounts on  by direct debit instruction (DDI).

I agree that all details in the contribution schedule are correct.

[Cancel](#) [Submit](#)



Step 1

Step 2

Step 3

Step 4

Step 5

### Step 3:

Exceptions must be viewed by selecting 'Open' and then acted upon.

**AEGON**

Home | Scheme details | Scheme processes | Members

**Home**

**Scheme summary**

Employer name: Greig Co\_0509  
 Address: 1  
 1 11  
 1  
 1  
 Scheme start date: 31/01/2015  
 Scheme adviser: AH AH\_Adviser\_ARC  
 Scheme adviser address: 1  
 1  
 1

**Watch our videos**  
 View demos

**Following reports require your attention.**

Type of Report	Date of Generation	
Contribution Schedule	20 Sep 2016	<b>Open</b>

<< < 1 / 1 > >>

**Contribution schedule history**

Previous payroll period	Payroll	Type	Total	Status
1 Jun - 30 Jun 2017	Employer	Regular payment		Awaiting payment

Step 1

Step 2

Step 3

Step 4

Step 5

## Step 4:

Exception reports can be reviewed and amended separately.

Leavers will need to be updated before your next contribution upload.

Contribution Schedule Details		Process type	Contribution Schedule
Date	28/09/2016	Batch run ID	3068917
User	Graig Co_8509	Rows processed	30
Template Name	Contributions	Rows failed	0
		Total rows	30

### Employee details not updated:

Row Number	Investor ID	Employee Name	Peyroll Ref	Error Details
4	20504430	RogerA Anderson	AP180	Contribution details are missing.
5	20504430	RogerA Anderson	AP180	Contribution details are missing.
6	20504430	RogerA Anderson	AP180	Contribution details are missing.
7	20504547	Ally Stewart	AP200	Contribution details are missing.
8	20504548	John Stewart	AP201	Contribution details are missing.
9	20504549	Smithy Stewart	AP202	Contribution details are missing.
10	20504550	James Stewart	AP203	Contribution details are missing.
11	20504551	Bobby Stewart	AP204	Contribution details are missing.
12	20504430	RogerA Anderson	AP180	Contribution details are missing.

### Non-Contributors with invalid status:

Row Number	Investor ID	Employee Name	Category	Site	Status-Old	Status-New
------------	-------------	---------------	----------	------	------------	------------

### Contributions outside expected tolerance:

Row Number	Investor ID	Employee Name	Category	Site	Status	Employer Contribution expected	Employer Contribution actual	Salary sacrifice expected	Salary sacrifice actual	Member Contribution expected	Member Contribution actual
------------	-------------	---------------	----------	------	--------	--------------------------------	------------------------------	---------------------------	-------------------------	------------------------------	----------------------------

### Employee details updated (based on the file):

Row Number	Investor ID	Employee Name	Field	Old	New
------------	-------------	---------------	-------	-----	-----

Please see the next page for exception report assistance.

Step 1

Step 2

Step 3

Step 4

Step 5

## Step 5:

### Data validation

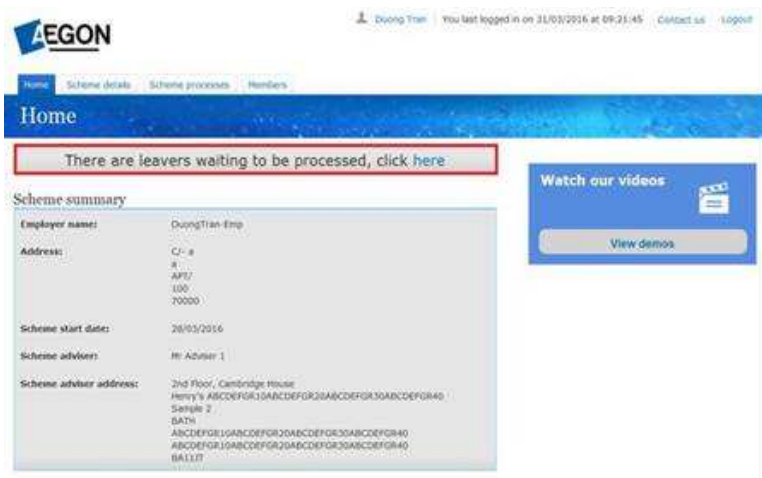
The existing process will still apply – for example date formats and National Insurance numbers. To help you, please use our data validation tool, which is available for download [here](#).

### Exception reports

If you receive an exception report please ensure you undertake the action/s required, as it will ensure your data is up-to-date and correct as possible.

### Updating non-contributors

Before your next payroll run you must update your non-contributors – see the box highlighted in red below.



If you need any assistance, please contact the support team: 0345 680 1234 or email [clientsupport@arc.aegon.uk](mailto:clientsupport@arc.aegon.uk)

Step 1

Step 2

Step 3

Step 4

Step 5



[aegon.co.uk](http://aegon.co.uk)



@aegonuk



Aegon UK



Aegon UK