

# Your easy auto enrolment schedule



## Find out everything you need to do and how we can help

There is a lot to consider when preparing for auto enrolment but we are here to help you every step of the way. See our guides on Easy Auto Enrolment Plus and Executive Auto Enrolment for details on upgrading your support package.

### 1 Know your staging date & Point of Contact Included in Easy Package

Your staging date has already been decided for you by The Pensions Regulator. The date was based upon the numbers of employees working for your company on April 2012. You can bring your staging date forward but can not move it backwards. Contact us to discuss the exception to this rule.

The point of contact is the person the Pensions regulator will send your vital communications to.

- Finding out your staging date if you supply P.A.Y.E. Number** ..... **...YES...**
- Helping you choose your point of contact** ..... **...YES...**
- Tailored Auto enrolment as your companies point of contact** ..... **UPGRADE**

### 2 Putting your team together Included in Easy Package

You will need to decide who is going to do what. There are many different parts to auto enrolment and they need to be joined together. You will need to understand all of the things that need to be completed to be compliant.

- Liaising with your payroll person** ..... **...YES...**
- Taking responsibility for all of the regulatory communication** ..... **...YES...**
- Providing pension scheme details** ..... **...YES...**
- Overseeing the process to ensure you stay compliant** ..... **...YES...**
- Reviewing existing pension schemes you have in place** ..... **UPGRADE**

### 3 Assessing your workforce & the cost Included in Easy Package

Once you have got your team together the work starts on what auto enrolment will look like for your company. We will help you assess your workforce and identify who is eligible, non- eligible or entitled. Remember that auto enrolment is a process that happens every pay run.

- Who are your workers?** *You may need to seek professional legal advice to confirm who is legally a worker* ..... **...YES...**
- Identify who is to be automatically enrolled** ..... **...YES...**
- Identify those workers who can opt in or join** ..... **...YES...**
- Calculate your contributions now and in 2018** ..... **...YES...**
- Certification** *There are 4 different ways of calculating your contribution. Easy Auto enrolment only uses Qualifying Earnings* ..... **UPGRADE**

**The Pensions Regulator will write to you 12 months and 3 months before staging, reminding you of your duties**

The success of your auto enrolment implementation is dependent on the quality of your data. By preparing in advance we can ensure you have time to correct any incorrect or missing information. On receipt of your £199 + V.A.T. booking fee we will upload your basic company details. You don't pay anything else until 3 months before your staging date. We will then ask you for your data in a specified format. If you want to use Salary Exchange we will need to assess each individual employee.

<b>Uploading your employees data well in advance</b> .....	...YES...
<b>Corresponding with your payroll person to address incorrect/missing information</b> .....	...YES...
<b>Informing your payroll person what they will need to do each pay run (Guide Provided)</b> .....	...YES...
<b>Salary Exchange</b> <i>(Can reduce N.I contribution but needs specialist advice. Read our Salary Exchange literature)</i> .....	UPGRADE

Those employees who are classed as eligible jobholders have the option to opt out of the scheme you implement. Non eligible job holders have the option to opt in and entitled workers have the option to join. Your system needs to process this every pay run and also keep this information on file as an audit trail. You can also postpone the date you start making contributions but this does not change your staging date.

<b>Opting in, Opting Out and Joining</b> .....	...YES...
<b>Providing supporting communication by email and post</b> .....	...YES...
<b>Keeping records of all communication</b> .....	...YES...
<b>Assessing new employees and re-classifying employees on age milestones</b> .....	...YES...
<b>Postponement</b> <i>Whole scheme, individual, seasonal or new employees</i> .....	UPGRADE

Easy Auto Enrolment will use N.E.S.T .as its default pension provider but you can use Easy Auto Enrolment Plus or Executive Auto Enrolment to research the market for greater fund choice with other providers. We will ensure your employees are provided with access to the information they need at the right time.

<b>Setting up the Pension Scheme for your company</b> .....	...YES...
<b>Liaising with your payroll person to ensure the first contributions you send are received</b> .....	...YES...
<b>Providing access to details of the fund choices available</b> .....	...YES...
<b>Providing access to supporting auto enrolment literature</b> .....	...YES...
<b>Seminar or one to one employee support</b> .....	UPGRADE
<b>Multiple Schemes</b> <i>You can elect to have more than one scheme but this does complicate payroll</i> .....	UPGRADE

The Pensions regulator will want to know that you have staged successfully 5months after your staging date. Your Easy Auto enrolment solution sends this information once your payroll has been successfully completed and pension deductions taken (except where postponement has been used).

<b>Declaration of Compliance sent to The Pensions regulator</b> .....	...YES...
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