Automatic enrolment: Planning steps for employers



Your staging date Agree a communication strategy and begin communicating with Choose a vour employees workplace pension supplier What communications Is your existing are required to ensure supplier willing to that your employees are **1** Assess your workers **Re-enrol all eligible Identify your** take on all workers? fully aware of automatic 2 Issue statutory jobholders staging date If not, you will need enrolment and the communications to At three-yearly Use the tool at www. to source a new implications for them? workers intervals you have thepensionsregulator. supplier and run What communications **3** Enrol all eligible to re-enrol eligible different schemes gov.uk/employers/ channels will you use and Establish a new workers into your iobholders who are not for different what assistance is available automatic enrolment automatic enrolment active members of a tools/staging-date. scheme (if applicable) qualifying scheme. workers. to you? scheme aspx Ċ Ś ÷ K 1-3 months Within 3 months 4 months 12 months 6-9 months 3 years ~ ~ from staging before staging before staging before staging of staging from staging **Conduct** an initial **Decide upon** Test your systems in Make all eligible **Register your scheme** jobholders members with The Pensions assessment of your a compliance advance solution Conduct at least one of a qualifying workforce Regulator How many workers must 'dummy run' to ensure It must: scheme you automatically enrol? link with your that your solution You can wait up • Is the existing contribution to 3 months to payroll is compatible with basis fit for automatic assess and payroll before you 'go automatically enrol eligible enrolment purposes? live'. monitor your Ongoing • Will you offer the same workers jobholders if you use Automatically enrol new eligible members within contributions/scheme to three months of joining/becoming eligible generate postponement, but all workers, or segment employees can opt in Process workers opting in necessary them? communications during this period. Refund contributions to any jobholder who opts • Will it be affordable? out (jobholders have one month to opt out) maintain records • Keep records of contributions paid, employees • Will you use

postponement?

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enrolled, opt ins and opt outs