



## Automatic Enrolment Timetable for: WPD Test Scheme

### IMPORTANT DEADLINES

**Staging Date:** 01-Feb-2016

**Automatic Enrolment Date:** 01-May-2016

**Declaration of Compliance:** 30-Jun-2016

**Re-enrolment:** 01-Feb-2019

### PROGRESS REPORT: 10-Feb-2016

TIMETABLE			
	TASK	DEADLINE*	STATUS
1	Nominate a Point of Contact	24-Feb-2015	INFO OUTSTANDING
2	Initial Employee Communication	03-Apr-2015	COMPLETE
3	Employee Data Request	04-May-2015	COMPLETE
4	Initial Employee Assessment	04-May-2015	COMPLETE
5	How much will it cost?	18-May-2015	COMPLETE
6	Check Payroll Processes	03-Aug-2015	COMPLETE
7	Choose Qualifying Workplace Pension Scheme	03-Aug-2015	IN PROGRESS
8	Set up Qualifying Workplace Pension Scheme	10-Aug-2015	IN PROGRESS
9	Payroll Set Up	21-Dec-2015	IN PROGRESS
10	Learn How to Administer your Pension Scheme	21-Dec-2015	NOT STARTED
11	Automatic Enrolment Report	10-Aug-2015	IN PROGRESS
12	Scheme Certification	01-Feb-2016	COMPLETE
13	Staging Date Assessment	01-Feb-2016	NOT STARTED
14	<b>Write to your workers -Staging Date</b>	14-Mar-2016	NOT STARTED
15	Ongoing Automatic Enrolment Duties	01-Feb-2016	ONGOING
16	<b>Write to your workers - end of Postponement</b>	11-Jun-2016	NOT STARTED
17	Assess and Enroll Workers	01-May-2016	NOT STARTED
18	Deduct Pension Contributions	01-May-2016	NOT STARTED
19	Send pension data to Pension Provider	01-May-2016	NOT STARTED
20	Send pension contributions to Pension Provider	20-Jun-2016	NOT STARTED
21	<b>Declaration of Compliance</b>	30-Jun-2016	NOT STARTED
22	Choose Re-enrolment Date	31-Jan-2019	NOT STARTED

\*DEADLINES highlighted in red are set by The Pensions Regulator. There is some flexibility with others

For more detailed information please read the attached document "AUTOMATIC ENROLMENT PROCESS"

# The Automatic Enrolment Process



TASK	How Workplace Pensions Direct can help
1	<p>Nominate a Point of Contact</p> <p>This lets The Pensions Regulator know who they should contact in connection with an employer’s automatic enrolment duties. WPD will act as the employer’s agent.</p>
2	<p>Initial Employee Communication</p> <p>Where an employer’s staging date is several months in the future WPD will provide a letter template that can be used to provide information to employees.</p>
3	<p>Employee Data Request</p> <p>An excel spreadsheet template needs to be complete. This will provide WPD with basic employee information required to assess employees.</p>
4	<p>Initial Employee Assessment</p> <p>WPD will tell the employer who needs to be automatically enrolled, based on the information supplied to them.</p>
5	<p>How much will it cost?</p> <p>A report produced by WPD showing a breakdown of pension contributions for each individual and the employer, based on the four methods allowed by The Pensions Regulator. At this point the employer can confirm:</p> <ul style="list-style-type: none"> <li>• What definition of pensionable earnings they want to use.</li> <li>• Whether or not they want to use “phased contributions”.</li> <li>• What postponement period, if any, they wish to use.</li> </ul>
6	<p>Check Payroll Processes</p> <p>WPD will liaise with payroll providers to determine what services and functions are available for ongoing employee assessment. With over 100 HMRC approved payroll software packages available it is important that the functionality is know well in advance of their staging date.</p>
7	<p>Choose a Qualifying Workplace Pension Scheme</p> <p>When an employer chooses a pension scheme for their staff for automatic enrolment they must make sure it meets certain criteria. They should also choose a good quality scheme that provides value for money and protects their staff’s retirement savings. WPD will help them to choose from a selection of suitable pension providers that meet our due diligence criteria.</p>
8	<p>Set up Qualifying Workplace Pension Scheme</p> <p>Following the choice of pension provider WPD will set this up on behalf of the employer.</p>
9	<p>Payroll Set Up</p> <p>Information will be provided by WPD to an employer’s payroll provider to ensure that the pension scheme settings are input correctly. In addition, we can provide technical support, remotely or on-site.</p>
10	<p>Learn How to Administer your Pension Scheme</p> <p>Employers will be provided with information and links designed to help them to understand what they are required to do every pay period.</p>

11	Automatic Enrolment Report	A full report produced by WPD detailing all the choices that have been made.
12	Scheme Certification	The Pensions Regulator require an employer to have evidence that their pension scheme meets certain quality requirements. If required WPD will provide the employer with this certificate.
13	Staging Date Assessment	An employer's software will need to assess employees on their staging date to determine what action is required – WPD will provide guidance and support to them and/or their payroll provider.
14	Write to your employees on your Staging Date	The legislation requires an employer to inform their workers of how automatic enrolment affects them. This task may be carried out by payroll software. If not WPD will provide compliant letter templates. There are different templates to deal with the various situations.
15	Ongoing Automatic Enrolment Duties	This should be handled by payroll software. WPD will provide ongoing technical and regulatory support. Where payroll software cannot provide this functionality WPD have tools available. In this situation changes in circumstances must be discussed with WPD (new employees, earnings)
16	Write to your employees at end of Postponement	The legislation requires an employer to provide employees with specific information, including how to opt-out. This task may be carried out by payroll software. If not WPD will provide compliant letter templates.
17	Assess and Enrol Workers	This should be handled by payroll software. WPD will provide ongoing technical and regulatory support. Where payroll software cannot provide this functionality WPD have tools available. In this situation changes in circumstances must be discussed with WPD (new employees, earnings)
18	Deduct Pension Contributions	Employers must deduct contributions from employees' wages. It is really important that the correct tax relief method is used. WPD will provide guidance and support to ensure that pension contributions are calculated correctly and that the correct tax relief method has been given to the payroll provider.
19	Send pension data to Pension Provider	Details of employees who have joined the scheme and payment amounts must be sent to the pension provider and in the format or method they specify. There are deadlines for providing this information. WPD will provide support to ensure that correctly formatted data is available for the pension provider.
20	Send pension contributions to Pension Provider	It is the responsibility of the employer to pay over pension contributions to the pension provider within specified deadlines, set by The Pensions Regulator. WPD will provide regulatory and technical support to ensure that these deadlines are met. The deadline is 22 <sup>nd</sup> of the month following deduction from earnings. We have built in a safety margin to ensure compliance.
21	Declaration of Compliance	WPD will complete the employer's declaration of compliance. There is a legal duty on employers to complete this. It tells TPR what the employer has done to comply with their duties at their staging date or at the end of their postponement period(s) applied at staging.
22	Choose Re-enrolment Date	Any employee who chooses to opt-out must be automatically re-enrolled approximately every three years. WPD will help employers choose the most appropriate date for re-enrolment.