


# Sign-up checklist



You can complete this checklist to make sure you have all the information to hand in order to complete the online process of signing an employer up to The People's Pension.

**Bold** terms below are explained in more detail in our separate glossary which can be viewed at: [www.thepeoplespension.co.uk/employers/glossary](http://www.thepeoplespension.co.uk/employers/glossary)

 <b>Employer Details</b>	Write the information in the space below
Employer name and address	
<b>Company Registration Number</b> This is the unique number allocated by Companies House to every company or LLP. If the employer is registered with Companies House, use the eight character <b>Company Registration Number</b> . For other organisations, put any registration number applicable.	
<b>Date of Incorporation</b> This is the date on which a company was registered at Companies House. This can be found at no cost using the Companies House web check service at: <a href="http://www.companieshouse.gov.uk">www.companieshouse.gov.uk</a>	
<b>Staging date</b> This is the date on which an employer will assume its duties under the auto-enrolment regulations. If you have the employer's PAYE reference number to hand, you can find an employer's <b>staging date</b> on The Pensions Regulator's website: <a href="http://www.thepensionsregulator.gov.uk/employers/tools/staging-date.aspx">www.thepensionsregulator.gov.uk/employers/tools/staging-date.aspx</a>	
<b>Total number of employees</b> This is the approximate number of employees working for the employer.	
<b>Approximate number of employees to be enrolled</b> You will need to provide the approximate number of employees to be enrolled in The People's Pension.	
<b>Tax basis for pension contributions</b> This is the <b>tax basis</b> adopted by the employer in respect of employee pension contributions paid to The People's Pension. Employee pension contributions can be remitted either net (called 'relief at source' by HMRC) or gross (called 'net pay arrangement' by HMRC). The <b>tax basis</b> selected may depend on whether the payroll system used can deduct the contribution from the employees' earnings before, or after the deduction of tax. HMRC rules mean that the same <b>tax basis</b> must normally be applied to all the <b>Admin Accounts</b> in respect of that employer.	



## Admin Account Details

### The name of the Admin Account you would like to use for each payroll

You will have the opportunity to select an **Admin Account** name to identify each payroll operated by the employer. For example, you may choose to use a combination of the employer's name and the payroll frequency to help to differentiate between multiple payrolls operated by the same employer (if applicable).

### Pay Reference Period (PRP)

This is the period of time over which earnings are measured. For example, if a **worker** is paid weekly, the **PRP** will be one week and if they are paid monthly, the **PRP** will be one month. You will need to input the start date of the first **PRP** to be used.

### Payroll package

You will need to know which payroll software package is used.



## Admin Account Contact Details

You will need to provide the name and contact details of the person who will be administering the account, including uploading employee data files for the employer.



## Bank Account Details

These are the **bank account** details from which the employer will pay the pension contributions to The People's Pension. You will need to complete the name of the person who is the authorised signatory of the employer's **bank account**.

If more than one signatory is required to set up the direct debit, you will be able to download and print a paper mandate at the end of the process, which should be completed and returned to The People's Pension by post.



## Pension Contribution Details

### Worker Group ID

Worker Groups are used to set out the earnings basis and amount of the pension contributions to be paid to The People's Pension.

You will need to choose how to identify each **Worker Group** and that identifier must be included against each member in their data uploaded to the **Admin Account**.

For example, a simple alphabetical or numerical identifier could be used for each **Worker Group ID**.

### Earnings basis

You will need to confirm the type of earnings to be used in the calculation of pension contributions. You can choose from **qualifying earnings**, **pensionable earnings** or **total earnings**.

### Employer and/or employee contribution amounts

This is the amount of pension contributions to be paid by the employer and/or employee and may be expressed as either a percentage of earnings or fixed monetary amount.

### Postponement details

Under auto-enrolment rules, **postponement** can be applied at the employer's **staging date** for new starters or on the change of **eligibility status** (e.g. from **entitled worker** or **non-eligible jobholder** to **eligible jobholder**).



## Terms & Conditions

### Details of the person with the authority to bind the employer to the Scheme Rules

At the final step of the **sign up** process, you will be able to either confirm your authority to bind the employer to the Rules of The People's Pension, or arrange for an email to be sent to the person who has the authority to do this, so they can read the necessary information. Once the **set up** of the **Admin Account** has been completed, the **Admin Account** contact will receive an email, which provides their login details to access the **Admin Account**.

#### Important note for third parties/professional advisers

If you are completing the registration and **account** set up on behalf of your clients, it is important that you complete the process for one client at a time.

Therefore, once you have completed the registration and **account set up** on behalf of one employer (and any of its associated employers which are to be included as **Participating Employers**), you must return to the My Accounts screen before setting up any other clients.

Please email our New Business Support team at [nbsupport@bandce.co.uk](mailto:nbsupport@bandce.co.uk) if you have any queries.



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