

# Sign-up checklist

## We have 2 different sign-up routes

Simply Comply is our ready-to-go option – it takes just a few minutes to set up once you've filled in this checklist. Simply Tailor is our tailored route, with options galore!

Before you sign up, use the information below to see which route, works best for you.



	Simply Comply	Simply Tailor
Comply with minimum automatic enrolment duties	✓	✓
We email (or post) joining information to employees	✓	✓
Decide how much will be paid in by employer and employee	✗	✓
Choose which earnings basis you'll use to calculate employee contributions - Qualifying earnings, Set 1: Pensionable earnings, Set 2: Pensionable earnings or Set 3: Total earnings	✗	✓
The option to postpone working out which employees need to be enrolled	✗	✓
Add multiple payrolls	✗	✓
Add a monthly or weekly payroll	✓	✓
Add a fortnightly, four-weekly, lunar or 4-4-5 payroll frequency	✗	✓
Vary amounts of contributions for different groups of employees	✗	✓
The option to include subsidiary companies	✗	✓
One-off set-up charge	✓	✓
Use a salary sacrifice/exchange arrangement	✗	✓
Our full support for you and your employees	✓	✓

Once you've decided which sign-up route you'd like to take, use the following checklist to gather all the details before you start.



Complete this checklist to make sure you have all the information to hand for signing an employer up to The People's Pension.

We have 2 different sign-up routes: **Simply Comply** and **Simply Tailor**. You can find out more about them in our **quick guide to sign-up**. For Simply Tailor we'll need a few extra details.

 <b>Employer details</b>	Write the information in the space below
<p><b>Employer's field of business</b></p> <p>If the employer is in the construction industry, we'll ask if they follow the Construction Industry Joint Council's Working Rule Agreement.</p>	
<p><b>Employer type</b></p> <p>We need to know which type of employer you're signing up.</p> <ul style="list-style-type: none"> <li>• Limited or public limited company</li> <li>• Partnership or limited liability partnership</li> <li>• Sole trader</li> <li>• Overseas company</li> <li>• Charity</li> <li>• Government organisation</li> <li>• College or educational establishment</li> <li>• Individual</li> <li>• Unincorporated association</li> <li>• Limited liability company/ Community interest company</li> <li>• Limited partnership</li> <li>• Trust company</li> <li>• Church body/ Place of worship</li> </ul>	
<p><b>Employer's name and address</b></p> <p>You'll need the full employer's name and their registered address.</p>	
<p><b>Company registration number</b></p> <p>This is the unique registration number given to limited or public limited companies, or limited liability partnerships, by Companies House. For other company types add any applicable registration number.</p>	
 <b>Extra details depending on employer type</b>	
<p><b>For sole traders only</b></p> <ul style="list-style-type: none"> <li>• Proprietor's name, date of birth and address and how long they've been at that address (we'll need a previous address if this is less than 1 year)</li> </ul>	
<p><b>For partnerships and limited liability partnerships</b></p> <ul style="list-style-type: none"> <li>• Number of partners</li> <li>• Whether a partnership agreement exists</li> <li>• For each partner we need: name, date of birth and address and how long they've been at that address (we'll need a previous address if this is less than 1 year).</li> <li>• Number of beneficial owners (that own or control at least a 25% share in the business. If no partnership agreement is in place all partners are seen as equal beneficial owners) and their ownership share</li> <li>• Name, address and date of birth for each beneficial owner</li> </ul>	
<p><b>For charities</b></p> <ul style="list-style-type: none"> <li>• Charity registration number</li> <li>• Charity commission</li> </ul>	
<p><b>For an overseas company</b></p> <ul style="list-style-type: none"> <li>• Country</li> <li>• Registration number within country</li> </ul>	
<p><b>Government or public body</b></p> <ul style="list-style-type: none"> <li>• Employer's email address</li> </ul>	
<p><b>Individual</b></p> <ul style="list-style-type: none"> <li>• Individual's name, date of birth and address and how long they've been at that address (we'll need a previous address if this is less than 1 year).</li> </ul>	



## Employer details

Write the information  
in the space below

### Date of incorporation

For employers registered with Companies House we'll need the date they first registered. You can use the Companies House website to check: [companieshouse.gov.uk](https://companieshouse.gov.uk). For registered charities we'll need the date first registered.

### Duties start date

The date an employer's automatic enrolment duties start. You can find out more about this on The Pensions Regulator's website: [thepensionsregulator.gov.uk/en/employers.aspx](https://thepensionsregulator.gov.uk/en/employers.aspx)

### Total number of employees

The approximate number of employees working for the employer. We'll also ask for the approximate number of employees that will be automatically enrolled.

### Any other pension schemes

Does the employer have any other pension schemes?

### Pay frequency

How often are employees paid?

### Payroll package

Is the employer using a payroll software package? If so, which one?

### Assessing employees

Who will work out which employees should be put into the pension scheme?

## Simply Tailor – If you're signing up using our Simply Tailor route we'll need some additional details:

### Create an admin account



You should create an admin account for each payroll the employer operates – if they have a weekly and a monthly payroll they'll need 2 admin accounts. Each admin account will need a name too.

### Pay period start date

We'll need the start date for the pay period in which contributions will begin.

### Joiner information

Should employees receive joiner information by post or email?  
What employer name should be displayed on the joiner information?



## Admin contact details

### Name, address and contact details

We'll need the details for the person who'll be carrying out the day-to-day administration of the account.



## Bank account details

### Name and contact details

If you're not the authorised signatory on the bank account being used to pay contributions, we'll need you to provide the name and contact details for an authorised signatory. We'll contact them and ask them to complete and return the Direct Debit mandate. You'll also need the bank account name, sort code and account number.

## Simply Tailor – If you're signing up using our Simply Tailor route we'll need some additional details:

## Contribution details



We'll ask you to tell us about the level of contributions being made for each group of employees – known as 'worker groups'. The details we need will include the earnings basis being used to calculate contributions, along with the employee and employer amounts. Make sure your worker groups are accurate and match your payroll. We use worker groups to let your employees know their contributions and check you're meeting the legal minimums. You won't be able to submit your pension data if you're below the legal minimum contribution levels.

Each worker group must be given a 'worker group ID'. This is important as it'll need to be included each time the employer provides us with employee data.

If you're using The People's Pension to assess employees, we'll also ask if the employer will be using postponement – either new starter postponement or eligibility postponement.

You should create a worker group for groups of employees contributing at different levels. For example – if the employer contributes 5% for one group of employees and 7% for another, they'll need 2 worker groups.



## Set-up charge

When signing up to The People's Pension employers will need to pay a one-off set-up charge. This can be paid using Direct Debit or by providing credit or debit card details.

If you're paying by card, we'll also ask for the name, phone number and address the card is registered to.

The charge is £500 + VAT, but if you have a reduced charge code, the charge is reduced to £300 + VAT.

(If you're a financial or business adviser, you can get your reduced charge code by logging in to the Adviser Centre at [thepeoplespension.co.uk/advisers](https://thepeoplespension.co.uk/advisers)).



## Terms & conditions – bind the scheme

We'll ask you to provide the details of the person with the authority to bind the scheme – enter into a legally binding contract with People's Partnership, provider of The People's Pension. We'll email them and ask them to agree to our terms and conditions, and the account will not be ready to use until this has been done.

(If you're a financial adviser, federation or business adviser – such as an accountant or bookkeeper – you're unlikely to have this authority.)

## Sign-up is complete! So what's next?

### Bank account evidence

We'll ask you to send us evidence of the bank account being used to pay contributions. This could be a copy of a bank statement, void cheque or paying-in slip, and should be emailed to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk)

We need this to satisfy Anti-Money Laundering Regulations around checking the source of a company's funds. Please ensure you've completed the required information for Anti-Money Laundering on Online Services ([onlineservices.peoplespartnership.co.uk](https://onlineservices.peoplespartnership.co.uk)) before submitting any data.

### Direct Debit mandate

If you weren't able to set up the Direct Debit, perhaps because you're not a signatory on the account or the account needs more than one signatory, please make sure the account holder(s) email us a signed mandate to [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk)

### Agreement to bind

If you were unable to bind the scheme, please ensure the authorised person does this, as the scheme is not fully set up until it is bound.

We provide on-screen help - just click the  icon or go to 'Help and support'. You can also get online help through our webchat service or by emailing our New Business Support Team at [newbusiness@thepeoplespension.co.uk](mailto:newbusiness@thepeoplespension.co.uk)

**If you're an adviser completing the registration and account set-up on behalf of your clients, make sure you complete the process for one client at a time. Once you've completed the account set-up for one employer (and any of its subsidiary employers), you must return to the 'My Accounts' screen before setting up another client.**