

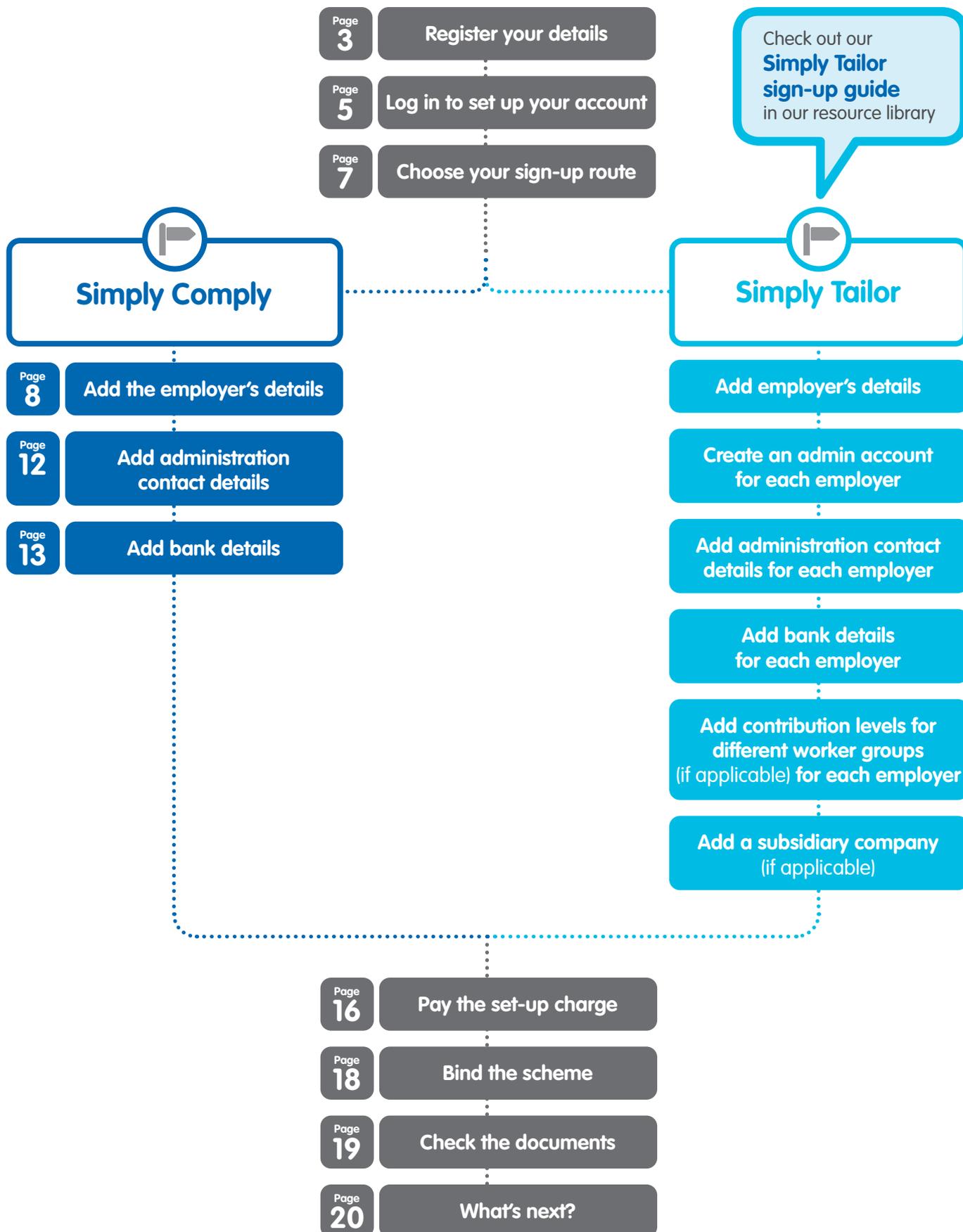
# Signing up with The People's Pension

## Simply Comply sign-up route

This guide is designed to help you sign up with The People's Pension using our online sign-up service. We have two different sign-up routes, Simply Tailor and Simply Comply.

This guide will help you with our Simply Comply route. This is the simplest and quickest way to join The People's Pension. Your scheme will comply with the minimum requirements set by The Pensions Regulator for auto-enrolment.





# Register your details

Visit our website [thepeoplespension.co.uk](https://thepeoplespension.co.uk) to sign up with us. Click 'Sign up' in the top right corner.



The screenshot shows the top of the website. In the top right corner, there are links for 'Accessibility', 'Media centre', and 'Contact us', followed by a 'Log in' button and a blue 'Employer account sign up' button. Below this is the 'the people's pension' logo and a navigation menu with 'Home', 'About your pension', 'Who we are', and 'Help and support'. A search icon is also present. The main banner features the text 'The People's Pension' and 'A workplace pension you can trust.' with a heart icon inside a gear.

The screenshot shows the 'Sign up to The People's Pension' page. The main heading is 'Sign up to The People's Pension' with the sub-heading 'Manage your account securely online'. There are three columns: 'Members', 'Employers', and 'Advisers'. Each column has a description and a 'sign up' button. A callout box points to the 'Employer account sign up' button, containing an 'Information' message: 'Manual entry in Online Services: We're sorry, but the option to add your employee data using manual entry in Online Services is currently unavailable. We're working hard to fix this as quickly as we can. Thank you for your patience and please try again later.' Another callout box points to the 'Adviser account sign up' button, containing the text: 'If you're a business or financial adviser register through our Adviser Centre first – you can save your clients money!'.

# Register your details continued

The first step is to register your email address with us. You'll then need to register your details.



## Register your details here

Please tell us the email address you would like to use for registration and future log in.

Email address:  \*

Confirm email address:  \*

**Need more info?**  
Not sure whether you can register for The People's Pension online? [Click here](#) to see who can sign up and when.

**Next**



## Register your details here

Please complete the information below to complete your registration.

Your email address:

Are you an employer or are you a third party/adviser acting on behalf of an employer?  
 \*

Title:  \*

Forename:  \*

Surname:  \*

Telephone number:  \*

Postcode:  \* [Find Address](#)

**Submit**

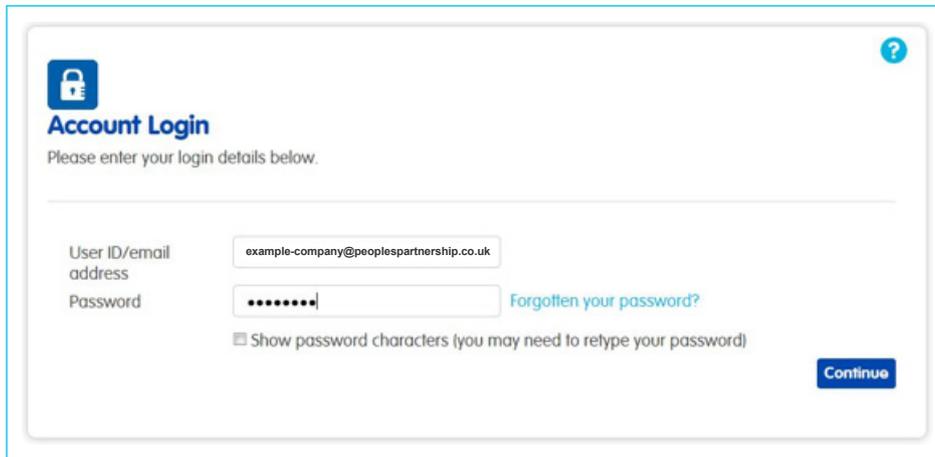
**Select whether you're an employer (or an employee signing up on behalf of the owner), or a third party/adviser.**

**Click on the ? icons for more information.**

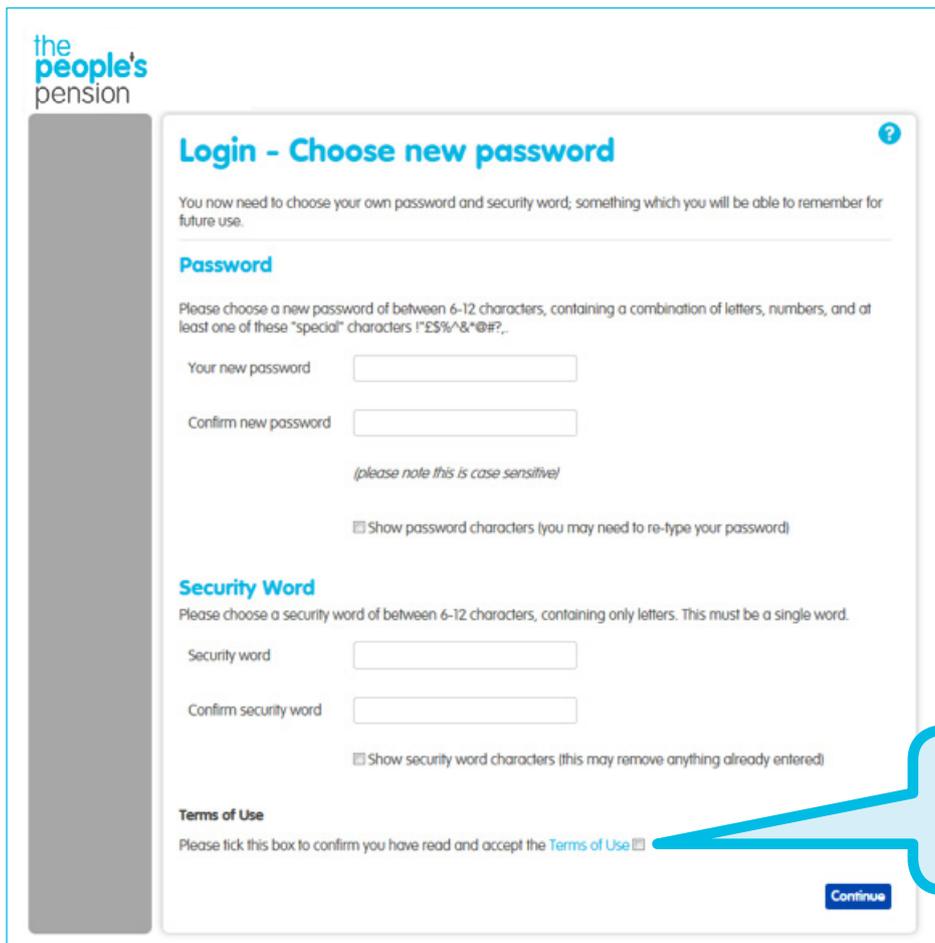
Once you've completed your details and submitted them to us, we'll send you an email with your login details. Then you can click the link in the email to set up an account with The People's Pension.

# Set up your account

The link in your email will take you to our login page. Enter your email address and the temporary password we sent you and click 'Continue'.



The screenshot shows the 'Account Login' page. It features a lock icon and a question mark in the top right. The text 'Please enter your login details below.' is followed by a horizontal line. Below this, there are two input fields: 'User ID/email address' containing 'example-company@peoplespartnership.co.uk' and 'Password' containing '\*\*\*\*\*'. A link 'Forgotten your password?' is next to the password field. A checkbox 'Show password characters (you may need to retype your password)' is below the password field. A 'Continue' button is in the bottom right corner.



The screenshot shows the 'Login - Choose new password' page. It features the 'the people's pension' logo on the left and a question mark in the top right. The text 'You now need to choose your own password and security word; something which you will be able to remember for future use.' is followed by a horizontal line. Below this, there are two sections: 'Password' and 'Security Word'. The 'Password' section has two input fields: 'Your new password' and 'Confirm new password', with a note '(please note this is case sensitive)' and a checkbox 'Show password characters (you may need to re-type your password)'. The 'Security Word' section has two input fields: 'Security word' and 'Confirm security word', with a checkbox 'Show security word characters (this may remove anything already entered)'. At the bottom, there is a 'Terms of Use' section with a checkbox 'Please tick this box to confirm you have read and accept the Terms of Use'. A 'Continue' button is in the bottom right corner.

Make sure you've read the Terms of Use before ticking this box.

# Set up your account continued

After you've entered your new password and security details and read our Terms of Use, click 'Continue'.

We'll ask you some questions about the employer to help us determine if our simplified sign-up route would be an option for you.

**the people's pension**

**Choose a sign-up route**

What is the employer's field of business?  ?

Will contributions to The People's Pension start on the staging/duties start date?  Yes  No ?

**Need more info?**

- [Understanding automatic enrolment contributions](#) +
- [Understanding how employee contributions are paid](#) +

[Terms of Use](#) | [Legal](#) | [Contact us](#)

If the employer's field of business is in the construction industry we'll ask if they follow the CIJC (Construction Industry Joint Council) Working Rule Agreement. To find out more, please take a look at our guide to operating the Working Rule Agreement at [thepeoplespension.co.uk/wp-content/uploads/2016/06/CIJC-Automatic-enrolment.pdf](https://thepeoplespension.co.uk/wp-content/uploads/2016/06/CIJC-Automatic-enrolment.pdf) alongside auto-enrolment.

If the employer follows this agreement our Simply Comply sign-up route won't be an option, so we'll direct you straight to our Simply Tailor route.

# Choose a sign-up route

Our Simply Comply sign-up route allows us to complete as much of the account set-up as possible. These account settings will comply with the minimum requirements for auto-enrolment.

With our 'Simply Comply' route you're unable to add subsidiary companies.

## Comparison of features

Features	Simply Comply	Simply Tailor
	We complete as much of the account set-up as possible for you to make it easier to sign up and get started. The account will be set up to comply with the minimum automatic enrolment duties. <a href="#">More...</a>	We let you set the account up with a full choice of options, allowing for a tailored solution specific to the employer's requirements. <a href="#">More...</a>
Offers postponement	No	You choose
How much will be paid into the pension scheme	Legal minimums	You choose
How often are employees paid	Weekly/monthly	You choose
Can include subsidiaries	No	Yes
One-off set-up charge	£500.00 plus VAT (Free of charge when signing up via a business or financial adviser with a reduced charge code.)	
What support do I get?	<ul style="list-style-type: none"> <li>✓ UK-based call centre open 8.30am - 5.30pm Monday to Friday(only).</li> <li>✓ ASK - online help facility</li> <li>✓ Resource library on our website full of useful information, downloadable guides, and help videos</li> <li>✓ Training mode to practice data uploads – available on the employer account once registered</li> </ul>	
Choose your route	<p><b>Start Simply Comply »</b></p> <p>£500 plus VAT*</p>	<p><b>Start Simply Tailor »</b></p> <p>£500 plus VAT*</p>

Free of charge when signing up via a business or financial adviser with a reduced charge code.

You'll be given the option of our 'Simply Comply' or 'Simply Tailor' sign-up routes and we've outlined the benefits of each route to help you decide.

# What we need

We'll ask you for more information about the organisation and its owners to comply with anti-money laundering regulations. The details we request will depend on the company type selected.

## → Public or private limited companies

- Employer name and postcode
- Company registration number

A limited company is registered with Companies House and has a company registration number. They have to submit annual accounts and returns to Companies House.

## → Sole trader

- Employer name and postcode
- Proprietor's name, date of birth and address (including how long they've lived at that address)

A sole trader is a person who owns and controls 100% of a business. There is no distinct separation between the sole trader and the business – the sole trader is personally liable for the debts of the business.

## → Partnership or Limited Liability Partnership

- Employer name and postcode
- Company registration number
- Number of partners
- Whether a partnership agreement exists
- For each partner, their name, date of birth, and address (including how long they've been at the address - we'll need a previous address if this is less than 1 year).
- 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.
- Name, address and date of birth for each beneficial owner

A partnership is owned by 2 or more people. If a partnership agreement is in place this will set out the proportion of the business that each partner owns. If no agreement is in place all partners are deemed to have an equal proportion. The partners are personally liable for the debts of the partnership.

A Limited Liability Partnership is registered with Companies House and is required to file annual accounts and returns with them. The members (usually called partners) are separate from the LLP – they're not personally liable for the debts of the LLP.

## → Registered charity

- Employer name
- Charity commission registration
- Charity registration number

An organisation which is registered as a charity with the Charity Commission in the UK.

## → Overseas company

- Country
- Business name
- Registered number
- Registered address

A business that's incorporated and registered outside of the UK but employs staff who are working or ordinarily working within the UK.

## → Government or public body

- Employer name
- Registration number
- Employer's email address

This could be a small local parish council or as big as a political party.

## → College or educational establishment

- Employer name and postcode
  - Registration number
- An educational establishment could also fall under one of the other company types.

## → Individual

- Individual employer's name
- Employer's address and date of birth

An individual may employ a person or several people, usually to perform a service such as a carer or housekeeper. Such an individual would have registered as an organisation with HM Revenue & Customs (HMRC) and would be deducting tax and National Insurance contributions.

## → Unincorporated association

- Employer name and postcode
- Registration number

An unincorporated association is an organisation set up through an agreement between a group of people who come together for a reason other than to make a profit. For example, a voluntary group or a sports club. Individual members are personally liable for debts of the organisation.

## → Church body/Place of worship

- Employer name
- Company registration number
- Business postcode

# What we need continued

## → Trust Company

- Employer name
- Company registration number
- Business postcode

A legal entity that acts as a fiduciary, agent, or trustee on behalf of a person or business for a trust.

## → Community Interest Company (CIC)

- Employer name
- Company registration number
- Business postcode
- Number of partners
- Whether a partnership agreement exists

A special type of limited company which exists to benefit the community rather than private shareholders.

A limited partnership (LP) exists when two or more partners go into business together, but the limited partners are only liable up to the amount of their investment. An LP is defined as having limited partners and a general partner, which has unlimited liability.

**If you're unsure what company type to select you should check with your accountant or business adviser.**

# What we need continued

0% complete

## Tell us about your company

We need to know some details about your company so that we can satisfy Anti-Money Laundering Regulations.

If the employer is registered with Companies House, select the same employer type as recorded on the [Companies House website](#). If the employer is not a registered company but is registering because they employ a worker (for example a carer, gardener, cleaner, nanny or support worker), select employer type 'Individual'.

Employer type:

---

Employer name:

Company registration number:  ?

Business postcode:

Can be left blank if company registration number provided

---

To comply with Anti-Money Laundering Regulations we need to confirm the identity of employers wanting to join The People's Pension – this includes the employer's beneficial owners and directors. To do this we may use electronic verification through [SmartSearch](#), which reviews publicly available information on companies and Individuals. If our checks fail to adequately confirm the employer's identity and beneficial ownership, we may write to the employer to ask for more information.

If you're not sure what your 'Employer Type' is, see pages 8 and 9 of this guide.

Once you've checked the details you've provided, select 'Save and continue'.

# What we need continued

For certain company types we'll carry out a search to find the business and will ask you to confirm we've found the right one.

20% complete

## Employer details

To begin setting up the account, please enter the employer details. For help on what is needed for each field, please click the [?](#) button.

---

Employer name:

Employer type: Private Limited Company

Company registration number:

Date of incorporation:  \* [?](#)

Postcode:  \* [Find address](#)

Address 1:  \*  
People's Partnership Limited

Address 2:

Town:  \*

County:

Telephone number:

Do you have a Staging date or Duties start date?  
 Staging date [?](#)  
 Duties start date [?](#)

Duties start date:    \*

---

Total number of employees:  \* [?](#)

Are there any pension schemes being administered other than those with B&CE?  \* [?](#)

How often are employees paid (tick all that apply):  
 Weekly  Monthly

Payroll package:  \*

Who will work out which employees will be put into the pension scheme?  \* [?](#)

[Cancel](#)[Save and continue](#)

**If the employer's payroll provider isn't helping to work out who needs to be enrolled and how much the contributions should be, we can help. Just select 'The People's Pension'.**

You'll need to include information about employees and how they're paid.

Once you're happy with the details provided select 'Save and continue'.

# Adding an administration contact

Once you've entered these details and clicked 'Save and continue', the first stage of setting up the account is complete. We'll then need you to add contact details for the person who will be administering this account – often somebody that works for the employer.

The screenshot shows a multi-step account setup process. At the top right, a progress bar indicates '30% complete'. The first section, 'Employer details', includes fields for Employer name (User guide), Address (Manor Royal, CRAWLEY, W Sussex, RH10 9QP), Company registration number, and Staging date (01/12/2016). An 'Amend employer' button is located to the right. The second section, 'Monthly', contains an 'Account summary' table and a 'Create contact details' step with an 'Add' button. A blue arrow points from the 'Add' button to a detailed 'Edit contact details' form. This form includes fields for Title (Miss), Forename (User), Surname (Guide), Postcode (RH10 9QP), Address 1 (People's Partnership Limited), Address 2 (Manor Royal), Town (CRAWLEY), County (W Sussex), Job title, Telephone (01293 589999), and Email (userguide@peoplespartnership.co.uk). A 'Find address' button is next to the postcode field. A checkbox for 'Third party adviser?' is present, and a note states '\* Denotes mandatory field'. At the bottom are 'Cancel', 'Delete', and 'Save and continue' buttons.

Name	Payroll package	Who will work out which employees will be put into the pension scheme?
User guide Monthly	FOURTH (FOURTH)	Payroll/HR Provider

Title:	Miss	*
Forename:	User	*
Surname:	Guide	*
Postcode:	RH10 9QP	* Find address
Address 1:	People's Partnership Limited	*
Address 2:	Manor Royal	
Town:	CRAWLEY	*
County:	W Sussex	
Job title:		
Telephone:	01293 589999	*
Mobile:		
Email:	userguide@peoplespartnership.co.uk	*

If you've already provided us with contact details you'll have the option to select the existing contact.

This person will receive access to the account as well as emails and notifications about the pension scheme.

When you're ready click 'Save and continue'.

# Adding bank account details

Once you've added contact details we'll ask for some bank details. These details will be used for the payment of contributions to employees' pension pots. The administration contact will have the option to select when they would like to make a payment once the account has been set up.

### Instruction to your bank or building society to pay by Direct Debit

Tell us about the bank account to be used for the payment of pension contributions.

 queries contact our Helpdesk No: **0800 612 8080**  
We'll need your account details, which can be found for example on your bank statement, to complete the Direct Debit Instruction.

\* Denotes mandatory field

**Bank details**

Description:  \* ?

Sort code:  -  -  \*

Account number:  \*

Account name:  \* ?

**Signatory details**

Title:  \* ?

Forename:  \* ?

Surname:  \* ?

[You can read the Direct Debit Guarantee by clicking here](#)

We'll fill in the bank's name and address based on the sort code you provide. Don't worry – this may not be your local branch.

If you're not the only signatory required to authorise a Direct Debit please select 'No'. You can still input bank details but you'll need to print this out for signing later. This can then be emailed back to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk)

If you're happy with the details you've entered click 'Save and continue'.

# Adding bank account details

You'll come to a summary screen.

50% complete

### Employer details

Employer name	Test
Address	People's Partnership Limited, Manor Royal, CRAWLEY, West Sussex, RH10 9QP
Company registration number	12345678
Duties start date	01/01/2019

[Amend employer](#)

### Monthly

#### Account summary

Name	Payroll package	Who will work out which employees will be put into the pension scheme?
Test Monthly		Payroll/HR Provider

#### Contact details

Name	Address	Job title	Telephone number	Email
Mr Test Monthly	People's Partnership Limited Manor Royal CRAWLEY West Sussex RH10 9QP		01293586666	

[Amend](#)

#### Bank details

Description: Test

Sort code	Account no.	Account name	Bank name	Bank branch	Signatory name
##-##-##	#####	Test	HSBC UK BANK PLC	CRAWLEY BOULEVARD	Mr Test Test

Originator: People's Partnership Limited (This is the name which will appear on your bank statement)  
Service user no.: 842921  
Please confirm your Bank/Building Society details above are correct, and make any amendments before proceeding with setup.

[Amend](#)

[Continue](#)

If you're happy with the details click 'Continue'.

# Summary of your account

the people's pension [userguide@peoplespartnership.co.uk](mailto:userguide@peoplespartnership.co.uk)

Help & support

Home  
Sign-up help  
Logout

60% complete

### What we have set up for you

Account name	Test Monthly
Contact name	Test Employer
Bank account name	Test
Contribution levels	Employer: 3.0% Employee: 5.0%
Duties start date	01/01/2019
Worker group ID	M

Please confirm you are happy with what we have set up for you.

I understand that this account will be set up to meet automatic enrolment regulatory requirements

[Back](#) [Continue](#)

#### Need more info?

- [Understanding automatic enrolment contributions](#) +
- [Understanding how employee contributions are paid](#) +
- [Understanding worker groups](#) +

[Terms of Use](#) | [Legal](#) | [Contact](#)

We'll show you what we've set up for you including the contribution levels. For more information about this you can expand the headings at the bottom of the screen.

If you're happy with what we've set up for you, tick the box before clicking 'Continue'.

Once you've ticked that you understand and have clicked 'Continue', a message will appear informing you that the details you've entered can't be amended. You'll need to select 'Yes' to continue.

# Set-up charge

70% complete

## Set-up charge

One-off sign up charge

### Reduced charge code

[What's this?](#)

If you received a reduced charge code from your adviser, please enter it below.

[Apply code](#)

Contains 7 characters including numbers and letters  
e.g. ANI-7G29

**Don't have a code?**

[Continue without code](#)

You will not get another opportunity to enter a code once you have made payment.

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We'll ask for payment of the one-off set-up charge. This is £500 + VAT, or if you have a reduced charge code you can enter it here.

If you're a financial adviser, federation or business adviser (such as an accountant or bookkeeper):

1. log in to the Adviser Centre
2. get your reduced charge code
3. share it with your clients.

70% complete

## Set-up charge

One-off sign up charge

### Reduced charge code

[Add a code](#)

### Summary

Set up charge	£500.00
Discount <a href="#">Add reduced charge code</a>	N/A
You will not be able to enter a code once you've paid.	
Sub total	£500.00
VAT	£100.00
<b>Total to pay</b>	<b>£600.00</b>

[Pay by Direct Debit](#) [Pay by card](#)

Please note: if you choose to pay by card, this will be processed by Global Payments. Take a look at their [website](#) for more information on how they handle your data.

If you choose to pay by Direct Debit, we'll give you the option to select the account details (for the employer's bank account) you've already given us. Payment will be taken on the 12th working day after we've activated the Direct Debit.

You can get a copy of the VAT invoice receipt in the 'Account transactions' section of the Online Account. We'll email a copy to you (and the admin contact you added to the account).

# Set-up charge

If you choose to pay by card, we'll ask you for some information on who the card is registered to.

Once payment has been authorised, you'll see a message confirming payment has been successful.

Home

Sign-up help

Logout

Help & support

80% complete

## Enter your billing information

Please complete your billing information. Your details won't be stored, but will be shared securely with Global Payments only to process your payment. Read more about how we store your data and when we'll share it, on our [website](#)

Use your existing details?  
Please select

Cardholder's email address\*

Please fill out at least one contact number below that is registered to the card\*

Cardholder's home number

Cardholder's mobile number

Cardholder's work number

Cardholder's billing address line 1\*

Cardholder's billing address line 2

Cardholder's billing address line 3

Cardholder's billing city\*

Cardholder's billing postcode\*

Cardholder's billing country\*  
Please select

\*Mandatory fields

Back

Continue to payment

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# Review the documents

After a few moments we'll produce some documents that you'll need to download. These are also available in the 'Documents' section in your Online Services account. You should click 'Continue' once you've downloaded all documents.

100% complete

## Documents

**Set-up complete**  
You have now set up an account with The People's Pension.

**Letter of Agreement**  
This is a summary of information supplied.

**Direct Debit Mandate**  
This is a copy of the Direct Debit instruction to the bank that has been designated for payment of pension contributions. **This needs to be printed, signed and returned by post.**

**Scheme Rules**  
These are the rules governing The People's Pension Scheme.

You can access these documents under the 'Completed accounts' section from your home page.

**Continue**

**Need more info?**  
[Visit our resource library »>](#)  
This is where you will find information such as how/when to communicate with employees and how to use Online Services.

# What's next?

**What you need to do next**

100% complete

- 1 Email bank evidence and the Direct Debit Mandate**

To comply with anti-money laundering regulations, we need evidence of the bank account that will be used to pay contributions. You can email a bank statement (dated within the last 3 months) to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk)

As soon as the Direct Debit mandate has been signed you can also email that to [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk) This needs to be in place to pay for pension contributions. We'll confirm we've received and arranged to set up your Direct Debit within three working days (of receiving the mandate). If you've selected to pay the sign up charge by Direct Debit we'll take payment after 12 working days.
- 2 Log in to Online Services**

Take a look around your **Online Services account**.

It's a good idea to familiarise yourself with all the features available as you'll need to use those regularly when managing your account with us. Please note that until we've completed 'Know Your Customer' and 'Source of Funds' checks, you won't be able to do the following within your account:

  - Make a payment
  - Submit employee data
  - Manage employee data

We need you to enter further details so that your Online Services account complies with anti-money laundering regulations. You won't be able to 'Submit employee data' until you've done this.
- 3 Set up a payroll provider**

If a payroll provider has not been set up now is the time. Having a payroll provider isn't essential but it may be handy if there are lots of employees.

To set one up you'll need some information from us, which you'll find in the 'documents' section.
- 4 Tell employees what's happening**

The Pensions Regulator requires every employer to tell their staff certain information about the pension that's been set up. This should be done as soon as possible either before or just after your automatic enrolment duties start.

We provide you with some templates in our [resource library](#).

[Back to documents](#) [Finish](#)

You can find generic templates to tell your employees what's happening in our resource library.

In the finance industry we're required to find out information about the companies we're doing business with in order to comply with anti-money laundering regulations. This is known in the finance industry as 'know your customer' and includes finding out about the source of a company's funds.

During the final stage of set-up we'll request evidence of the bank account details being used to pay pension contributions. The bank account name needs to match the name of the organisation that's signed up to The People's Pension. This needs to be a copy of a bank statement dated within the last 3 months. The statement must show your name, account number, sort code and the heading of your bank. It must include all pages and show your current address. We can't accept a document that has pages missing or where information has been obscured (eg transactions blocked out). We can't accept screen shots or printouts of online statements. If you do bank online, you can download a copy of your bank statement as a PDF file and send it to us. If you need help with this, please contact your bank. Please email this to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk). Though please note that this isn't a secure way to send documents. You can also post them to **The People's Pension, Manor Royal, Crawley, RH10 9QP**.

Once you've finished setting up the pension scheme it's a good idea to arrange for the admin contact to login and familiarise themselves with the employer's Online Services account. They'll need to use this to submit employee details and make payments.

If you were unable to bind the scheme this will need to be completed before the account is fully activated.