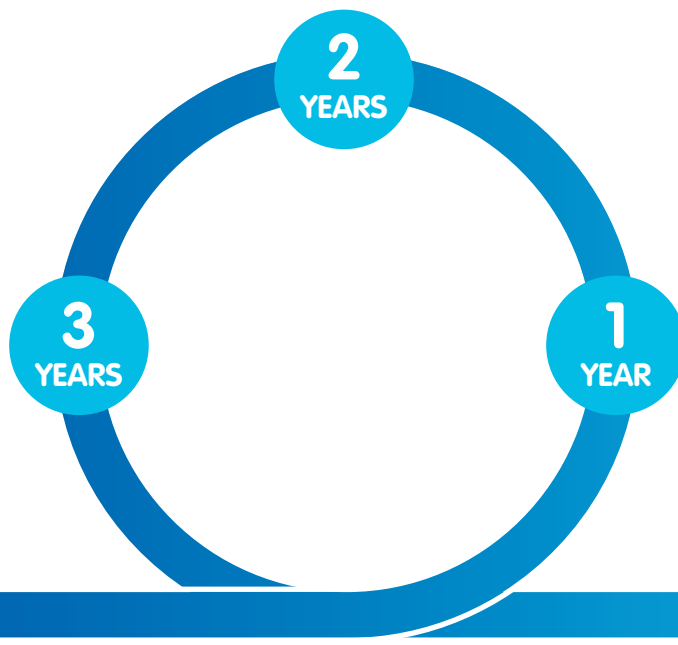


A quick guide to automatic re-enrolment

This guide shows you how to complete the stages of automatic re-enrolment – including how you can use your Online Services account to help.

Not sure what automatic re-enrolment's all about? Read our other guide '*Automatic re-enrolment – the three year cycle*' to get the full story.



Automatic re-enrolment – what’s it all about?

Re-enrolment is the government’s way to encourage people to save for their retirement. It’s a chance to remind employees (who may have opted out or reduced their contributions below the minimum level in the last three years) that they’re able to join a pension scheme.

This may help them to start saving for their retirement. But if they want to opt out again that’s fine too!

1. You have to check whether any of your employees need to be re-enrolled in your workplace pension, and then re-enrol anyone that does on a specific re-enrolment date.
2. You then need to re-declare your compliance with The Pensions Regulator. This shows you’re continuing to meet the government’s regulations.

Don’t worry – we can help!

When do you need to re-enrol?

The automatic re-enrolment date is three years on from your original staging date.



But you can re-enrol up to three months before or up to three months after the three-year anniversary of your staging date, if you’d like to.

Whatever re-enrolment date you choose is the date membership will begin for any employees you re-enrol. So you’ll need to start calculating contributions for these employees from the date you select.

And you can’t postpone with re-enrolment!

When you log in to your Online Services account, three months before your re-enrolment date you’ll see a new message...

www.onlineservices.bandce.co.uk

Help & support

- Home
- Account home**
- Manage employees
- Manage payments
- Manage employer
- Help

Manage account

! Automatic re-enrolment

You need to re-enrol within 3 months

Every three years the government wants to give the employees who have ceased active membership in the People’s Pension another chance to get started . It’s a process called cyclical re-enrolment , and involves some input from you.

Please note: If you have not provided us with an automatic re-enrolment date ,you will be unable to complete the file upload 2 months prior to your 3 year Staging date.

[Find out more](#)

Find out who to re-enrol

Once you've clicked 'Find out more' we'll give you a handy checklist to get you started.

? Help & support

Home

Account home

Manage employees

Manage payments

Manage employer

Help

Logout

Automatic re-enrolment

You need to re-enrol within 3 months.
Every three years you have to check whether any of your employees need to be re-enrolled in your workplace pension, and then re-enrol anyone that does.

Please note, if you haven't provided us with an automatic re-enrolment date two months before the three year anniversary of your staging date, you may be unable to send us your employee data.

Your Automatic re-enrolment checklist

Task

1. ! [Learn about your re-enrolment obligations](#) [Expand](#)
2. ! [Generate your automatic re-enrolment report](#) [Expand](#)
3. ! [Do you use us for assessment?](#) [Expand](#)
4. ! [Confirm your automatic re-enrolment date](#) [Expand](#)
5. ! [Inform the regulator](#) [Expand](#)

0 of 5 tasks completed

Complete

[Generate your re-enrolment report](#)

[Generate report](#) [Report guide \(pdf\)](#)

Expanding each option will give you access to extra help, like our detailed guide to automatic re-enrolment and our guide to using your re-enrolment report.

This report tells you which employees we think need to be re-enrolled – just click 'Generate report'. We won't include employees that have left the company, or any who have told us they want to opt out within the last year (as these employees don't have to be re-enrolled).

Example report

OptOut_Report_153536_2016-07-08 (002) [Read-Only] - Excel

FILE HOME INSERT PAGE LAYOUT FORMULAS DATA REVIEW VIEW

Cut Copy Paste Format Painter

Calibri 11 B I U Font

Wrap Text Merge & Center Alignment

General % Number

Conditional Formatting Table

Normal Bad Check Cell Explanatory ... Styles

M7

	A	B	C	D	E	F	G	H	I
	Forename	Middlename	Surname	Date of Birth	NI Number	Unique ID	AE Date	Ceased Active Membership Date	Employment End Date
1	James		Adkins	05/10/1977	JP188072A	117	01/06/2013	01/03/2015	
2	Reuben		Smith	01/08/1988	NA235478B	222	01/06/2013	01/08/2014	
3	Alice		Jones	25/09/1983	AJ955016C	100	01/06/2013	01/07/2013	
4	Lucas		Atkinson	19/05/1977	AB678951A	89	01/06/2013	01/06/2013	
5	Robert		Bennett	01/06/1964	ST987858A	51	01/06/2013	01/08/2014	01/08/2014

Signing up with The People's Pension

Simply Comply sign up route 3

Choose a re-enrolment date

Now you know who you need to re-enrol it's time to pick a date. Don't forget, your re-enrolment date is just one date per employer. So if you have a range of different payrolls, try to pick a date that aligns to all of them.

Once you're set on a date, let us know. You can tell us using step 4 of the checklist in your Online Services account.

You need to tell us your re-enrolment date at least two months before your three year staging date anniversary. Our system won't allow you to add employee data after this date until you've told us your re-enrolment date.

4.  Confirm your automatic re-enrolment date
Please note that the date cannot be changed once confirmed.



Remember, you won't be able to select a date prior to 3 months before or more than 3 months after the 3 year anniversary of your original staging date.

It's a good idea to let your employees know you're re-enrolling them (although you don't have to). You'll find a template letter you can use in our resource library www.thepeoplespension.co.uk/re-enrolment-template-letter.

Next steps

Do you use The People's Pension to assess your employees?

What you need to do

- 1 Use the re-enrolment report to work out which employees you need to re-enrol.
- 2 Add the letters 'RE' in the 'New starter/leaver' column on your normal file for the pay period that your selected re-enrolment date falls within. (You only need to add this if we're assessing your employees.)
- 3 Remove the 'RE' indicator for your next file.

What we'll do

- We'll assess your employees (including the re-enrolled ones) and suggest automatic enrolment statuses and contribution amounts. You'll then need to update your own payroll as normal.

Do you use a payroll provider to assess your employees?

What you need to do

- 1 Contact your payroll provider and let them know the re-enrolment date you've chosen. They may be able to manage the re-enrolment process for you. Don't forget to let them know you have a re-enrolment report from us.
- 2 If your payroll provider can manage the process, you need to let them know if you plan to re-enrol any employees that are exempt from re-enrolment.

Your payroll provider will need to:

- assess which of your employees need to be put into your pension scheme automatically and calculate contribution amounts
- supply new automatic enrolment dates (for re-enrolled employees) on your employee data file.

If your payroll provider can't help you with re-enrolment, don't worry – we can help or you can do it yourself.

Do you assess your employees yourself?

What you need to do

- Check your employee data is up-to-date and contains everyone who should be re-enrolled – either in your file or directly on our system (if you manually enter data).

What we'll do next

We'll write to any re-enrolled employees with joiner information. This will include all they need to know about their pension savings with us. We also include details about how they can opt out again if they want to.

This joiner information is the same one we send a brand new employee.

What you need to do

The last step is to re-declare your compliance with The Pensions Regulator. You can do this on their website at www.autoenrol.tpr.gov.uk.

You'll need to tell them:

- that your pension is an occupational pension scheme
- the name of the pension scheme is The People's Pension
- your employer pension scheme reference (EPSR), which is your five or six digit account number with us
- the pension scheme registry (PSR) number is 12005993
- the pension scheme address is The People's Pension, Manor Royal, Crawley, RH10 9QP.

You need to complete your re-declaration of compliance within 5 months of the 3 year anniversary of your staging date, even if you don't have any employees to re-enrol.

March 2013							March 2016							July 2016						
MO	TU	WE	TH	FR	SA	SU	MO	TU	WE	TH	FR	SA	SU	MO	TU	WE	TH	FR	SA	SU
25	26	27	28	1	2	3	29	1	2	3	4	5	6	27	28	29	30	1	2	3
4	5	6	7	8	9	10	7	8	9	10	11	12	13	4	5	6	7	8	9	10
11	12	13	14	15	16	17	14	15	16	17	18	19	20	11	12	13	14	15	16	17
18	19	20	21	22	23	24	21	22	23	24	25	26	27	18	19	20	21	22	23	24
25	26	27	28	29	30	31	28	29	30	31				25	26	27	28	29	30	31

Original staging date

Three year anniversary of staging date

Deadline for completing re-declaration of compliance

Checklist

Lastly you should revisit the re-enrolment checklist in your Online Services account. Tick each box to let us know you've completed your re-enrolment responsibilities.


Automatic re-enrolment

You need to re-enrol within 30 days.
Every three years you have to check whether any of your employees need to be re-enrolled in your workplace pension, and then re-enrol anyone that does.

Please note, if you haven't provided us with an automatic re-enrolment date two months before the three year anniversary of your staging date, you may be unable to send us your employee data.

Generate your re-enrolment report
[Generate report](#) [Report guide \(pdf\)](#)

Your Automatic re-enrolment checklist 0 of 5 tasks completed

Task	Complete
<p>1. Learn about your re-enrolment obligations You need to re-enrol certain employees who were previously automatically enrolled and may have ceased active membership or chosen to reduce their pension contributions to below the minimum level.</p> <p>Download our re-enrolment guide (pdf) Visit our website</p>	<input type="checkbox"/>
<p>2. Generate your automatic re-enrolment report This is a snapshot of those you may need to re-enrol as of today. You may want to run the report closer to your re-enrolment date.</p> <p>Generate report Report guide (pdf)</p>	<input type="checkbox"/>
<p>3. Do you use us for assessment? Please confirm this below so we can ensure the right employees are re-enrolled into The People's Pension.</p> <p><input type="radio"/> YES <input type="radio"/> NO</p>	<input type="checkbox"/>
<p>4. Confirm your automatic re-enrolment date Please note that the date cannot be changed once confirmed.</p> <p><input type="text"/> </p>	<input type="checkbox"/>
<p>5. Inform the regulator Usually this has to be done within five months of your chosen re-enrolment date. If you don't have any employees to re-enrol, you'll still need to re-declare your compliance.</p> <p>The Pensions Regulator</p>	<input type="checkbox"/>

Useful information

→ What if I don't have any employees to re-enrol?

You still need to provide us with a re-enrolment date and declare your compliance with The Pensions Regulator. You won't need to make any changes to the employee data you submit to us though.

→ What if the employees I need to re-enrol don't want to join the pension scheme?

You still need to re-enrol them to comply with the law. Once they've received their joiner information they'll be able to opt out again.

You'll need to re-enrol again in 3 years' time – don't worry, we'll remind you.



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