

Running your workplace pension hints and tips

We've pulled together some hints and tips so you know what to look out for when running your scheme, and to help you comply with your employer duties.

Add new workers as soon as they join

You'll need to add new workers as soon as they join the company. You can do this using the **Add Workers** area on the online service dashboard.

There's a regulatory requirement that statutory communications must be received by the worker within 6 weeks of joining. We'll produce and issue these communications on your behalf, once you've added the new workers to our system.

If this isn't received by the worker in time, you won't be able to use a postponement period for them.

Review the Assess area of your online service dashboard every pay period

Check the **Assess** area for each pay period relevant to your payroll(s). You should put in the gross qualifying earnings figures in the relevant pay period for all workers that need to be assessed. This includes salary, wages, overtime, bonuses and commission, statutory sick, adoption, maternity, ordinary or additional paternity pay.

Review your Update Payroll area before running your payroll

The **Update Payroll** area of your online service dashboard shows if there are any actions required. For example, worker enrolments, opt ins and opt outs.

It's important to keep this area up to date by marking each payroll update as 'done' as soon as your payroll has been updated. You can download your payroll updates into a file by clicking the 'Export Data' button.

Complete each of your tasks as they appear in your online service

The **Tasks** area of your online service dashboard is there to keep you right. It'll make you aware of opt ins, opt outs, missing details and certain governance tasks. And it'll remind you to review the **Assess** and **Update Payroll** areas too.

You should mark your tasks as 'done' as soon as you've completed them.

Submit your monthly contribution amounts and make your payments

You should submit your contribution amounts once a month, once you've completed your payrolls. Once you submit your contribution amounts, we'll collect the contributions using your direct debit.

We need to have received your contributions by the 22nd of the month, following the month in which the contributions have been processed via payroll.

Tell us about leavers and workers who stop contributions

If any of your workers leave or stop contributing to their plan, don't forget to tell us. You should let us know after their final contribution has been received and allocated.

You can highlight any leavers by updating each worker's information in the **Workforce** area of your online service dashboard.

Tell us about changes to worker information

You might want to make changes to your worker's details, such as:

- Name
- Title
- Address
- Email address
- Salary
- National insurance number

You can update these details by uploading an 'updating workers' csv file in the **Workforce** area of your online service dashboard.



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