



WORKPLACE PENSIONS IN BLACK + WHITE



Re-enrolment

Third Anniversary Re-enrolment (Cyclical Re-enrolment)



Content

- [Summary](#)
- [The Re-enrolment Date](#)
- [Setting the Re-enrolment Date](#)
- [The Re-enrolment Assessment](#)
- [Re-declaration of Compliance](#)

Summary



Every 3 years employers are required to re-enrol certain staff that:

- have previously been a member of the qualifying pension scheme; and
- have chosen to Opt Out or Cease Membership more than 12 months before the Re-enrolment Date; and
- are assessed as an eligible jobholder on the chosen Re-enrolment Date.

Employers must:

- select a Re-enrolment Date; and
- Re-enrol staff meeting the above criteria on that date; and
- communicate Re-enrolment to those staff and confirm their Opt Out rights; and
- complete a Re-declaration of compliance; and
- continue their employer duties for other staff.

Additional detailed information is available on The Pensions Regulator website here:

<http://www.thepensionsregulator.gov.uk/en/employers/re-enrolment.aspx>

The Re-enrolment Date

An employer must choose a Re-enrolment Date during their re-enrolment window, the window is 6 months:

- starting 3 months before the third anniversary of the Staging Date; and
- ending 3 months after the third anniversary of the Staging Date
- Postponement cannot be applied at Re-enrolment

Have you completed Re-enrolment already? If you have, please provide the following information from the Re-declaration of Compliance to technicalsupport@salvustrust.com

Re-enrolment Date	Total Number of Employees	Number Auto Re-enrolled	Number already enrolled
-------------------	---------------------------	-------------------------	-------------------------

If you have not yet completed the Re-declaration of compliance, follow the link to complete it: <http://www.thepensionsregulator.gov.uk/en/employers/re-enrolment/complete-your-re-declaration-of-compliance.aspx>

If you are about to, or are due to, complete Re-enrolment, please continue.

Setting the Re-enrolment Date



If you are about to, or are due to, complete Re-enrolment:

- you will be prompted to confirm your Re-enrolment Date when logging in
- the prompts start 1 month before the window opens
- upon reaching the third anniversary (3 months into the 6 month window) the Re-enrolment Date must be confirmed before continuing to upload data
- employers have the choice to also include those meeting the criteria but having chosen to Opt Out/Cease Membership in the 12 months before the Re-enrolment Date – if no choice is indicated they will not be included in Re-enrolment

Important:

- The Re-enrolment Date cannot be back dated to a Pay Period that has already been assessed
- The date can be amended later if not conflicting with the above

Setting the Re-enrolment Date



RE-ENROLMENT

Here you can confirm your 3 Year Re-enrolment date. Once confirmed it can be amended until either:

- the date has been Assessed; or
- the Re-enrolment window has closed.

If you have any questions on Re-enrolment, you can view the Pensions Regulator guidance [here](#), 3 Year re-enrolment may be referred to as Cyclical Re-enrolment.

Every 3 years employers are required to re-enrol certain staff.

- All relevant staff will be Re-enrolled during the Pay Period that includes your chosen Re-enrolment Date
- The criteria for re-enrolling staff is below
- You can choose any day during the Re-enrolment window shown below, inclusive of the start and end days
- The date cannot be during a Pay Period that has already been assessed
- The date can be amended later if not conflicting with the above points

Employers must re-enrol staff that:

- have previously been a member of the qualifying pension scheme; and
- have chosen to Opt Out or cease membership more than 12 months before the Re-enrolment Date (Employers have the option to also re-enrol applicable staff who have Opted Out or ceased membership more recently, see below); and
- are not in the pension and are eligible on the chosen Re-enrolment Date

Important:

- A person who must be Re-enrolled cannot be postponed
- Employers have the choice whether to exclude certain staff from Re-enrolment, for example, but not limited to, the employee has given notice to leave or has tax protection on their pension savings

Your Re-enrolment window:

Starts	01/02/2017
Ends	31/07/2017

The Pensions Regulator's guidance for employers is available [here](#).

Set Re-Enrolment Date

Setting the Re-enrolment Date

RE-ENROLMENT

Here you can confirm your 3 Year Re-enrolment date. Once confirmed it can be amended until either:

- the date has been Assessed; or
- the Re-enrolment window has closed.

If you have any questions on Re-enrolment, you can view the Pensions Regulator guidance here, 3 Year re-enrolment may be referred to as Cyclical Re-enrolment.

Your Re-enrolment window:

Starts	01/02/2017
Ends	31/07/2017

Please select your Re-enrolment Date:

01/05/2017, which is the third anniversary

A specific date during the above window 

Do you want to re-enrol the appropriate staff if they have Opted Out or ceased membership in the last 12 months:

Yes, re-enrol the appropriate staff:

What happens next?

Continue to assess your staff in the normal way. When assessing the Pay Period that includes your chosen Re-enrolment Date, the system will notify you and check the above criteria providing prompts if any action is necessary.

Save

The Re-enrolment Assessment



What happens after the Re-enrolment Date has been set?

If using **Secure Upload**

- Continue to assess staff in the normal way (i.e. in the payroll / third party assessment tool)
- Ensure any staff being re-enrolled are written to, including issuing the Employer Factsheet
- Notify Salvus Master Trust they have been re-enrolled by adding their data to the Secure Upload files

If using **Assessment**

- Continue to assess staff in the normal way for all pay frequencies
- When assessing the Pay Period that includes your chosen Re-enrolment Date, the system will notify you
- If any staff need to be Re-enrolled, follow the on screen instructions
- Commence deductions* in payroll
 - * Due to the complexity of Re-enrolment it is possible that a deduction would not be required when being Re-enrolled, follow the on screen instructions. If no deduction is required, ensure deductions start from the next pay day.
- All relevant staff will be Re-enrolled, communicated to and receive Opt Out rights

Re-declaration of Compliance



Complete the Re-declaration of Compliance, follow the link to complete it:

<http://www.thepensionsregulator.gov.uk/en/employers/re-enrolment/complete-your-re-declaration-of-compliance.aspx>

Following Assessment the Re-declaration of Compliance table will update, ensure all pay frequencies are completed before completing the declaration

Re-declaration of Compliance

You have now **16** days to declare compliance with the Pensions Regulator, please click here.

Your chosen Re-enrolment Date	
Your deadline to Declare Compliance with the Pensions Regulator	01/10/2017
Type of pension scheme(s) used for automatic enrolment	Occupational
Employer pension scheme reference (EPSR)	AEREEN000005
Pension scheme registry number (PSR)	N/A
Total number of staff employed on your Re-enrolment date	
The number of staff you Re-enrolled on your Re-enrolment date	
The number of staff who were already members of a pension scheme on your Re-enrolment date	
The number of staff who do not fall into the above categories	

The Re-declaration of Compliance has been completed, do not show this message again.
The information can be viewed from the settings if required.



SALVUS
MASTER TRUST

WORKPLACE PENSIONS IN BLACK + WHITE



www.salvustrust.com

