

Sage 50 Payroll Pensions re-enrolment and re-declaration

Presented by Calvin & Duncan

Sage



Housekeeping

The image shows a mobile application interface for a 'Questions' feature. The interface is divided into a dark grey sidebar on the left and a light grey main content area on the right. The sidebar contains several icons: a microphone icon (muted), a question mark icon, a document icon, an information icon, and an 'Exit' button. The main content area has a title 'Questions' with a close button, a question mark icon, and a text prompt 'Want answers?' with a dashed arrow pointing to a text input field labeled 'Ask the staff a question'. A blue 'Send' button is at the bottom right. Four callout boxes with green borders and lines pointing to specific icons provide instructions: 'Your microphone is muted automatically' points to the microphone icon; 'Download a handout' points to the document icon; 'Send us your questions' points to the question mark icon; and 'Switch to full screen' points to the information icon.

Your microphone is muted automatically

Download a handout

Send us your questions

Want answers?

Ask the staff a question

Exit

Send

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What is re-enrolment?

What it is, when you need to do it and what steps are involved

Re-enrolment using the Pensions Module

Demo of how to complete your re-enrolment using the Pensions Module

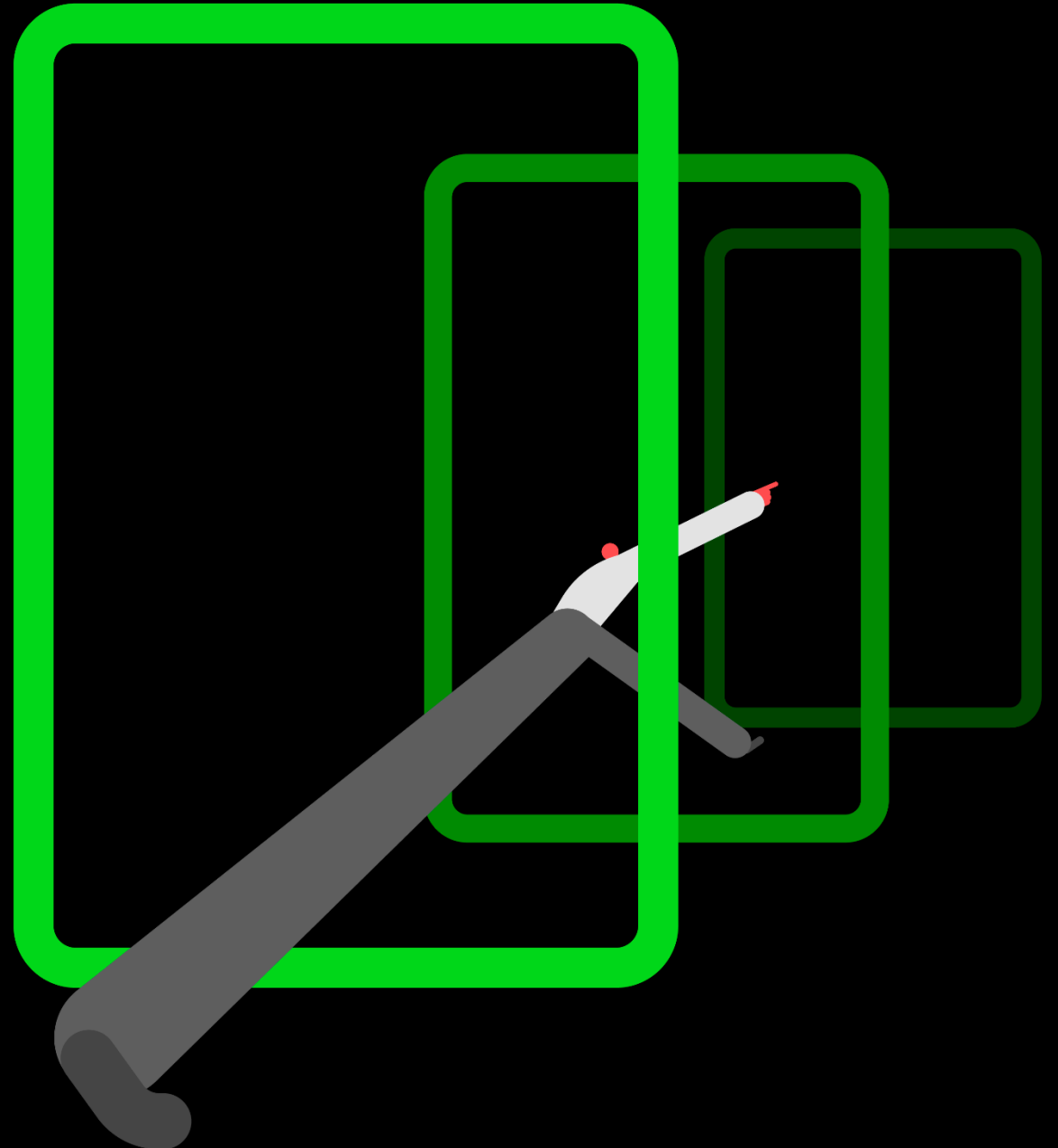
Re-declaration

Declare your compliance with The Pensions Regulator

Quiz

Further support and questions

What is re-enrolment?

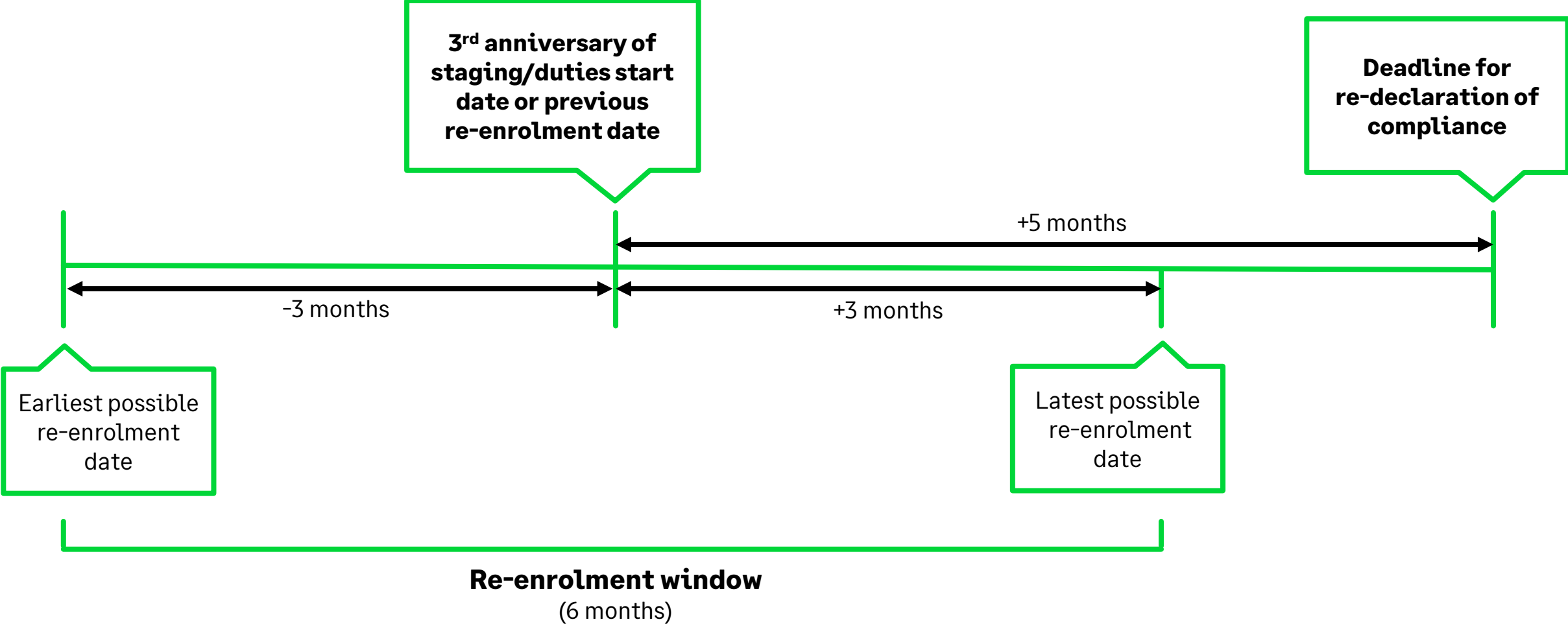


What is Re-enrolment?

Every three years you must assess if employees need to go back onto a pension scheme.

Your re-enrolment duties vary depending on whether you have any employees who fall into a worker category that you must re-enrol.

Re-enrolment date



Re-enrolment

Steps:

1. Assess and re-enrol eligible employees
2. Write to employees you re-enrol
3. Complete your re-declaration of compliance

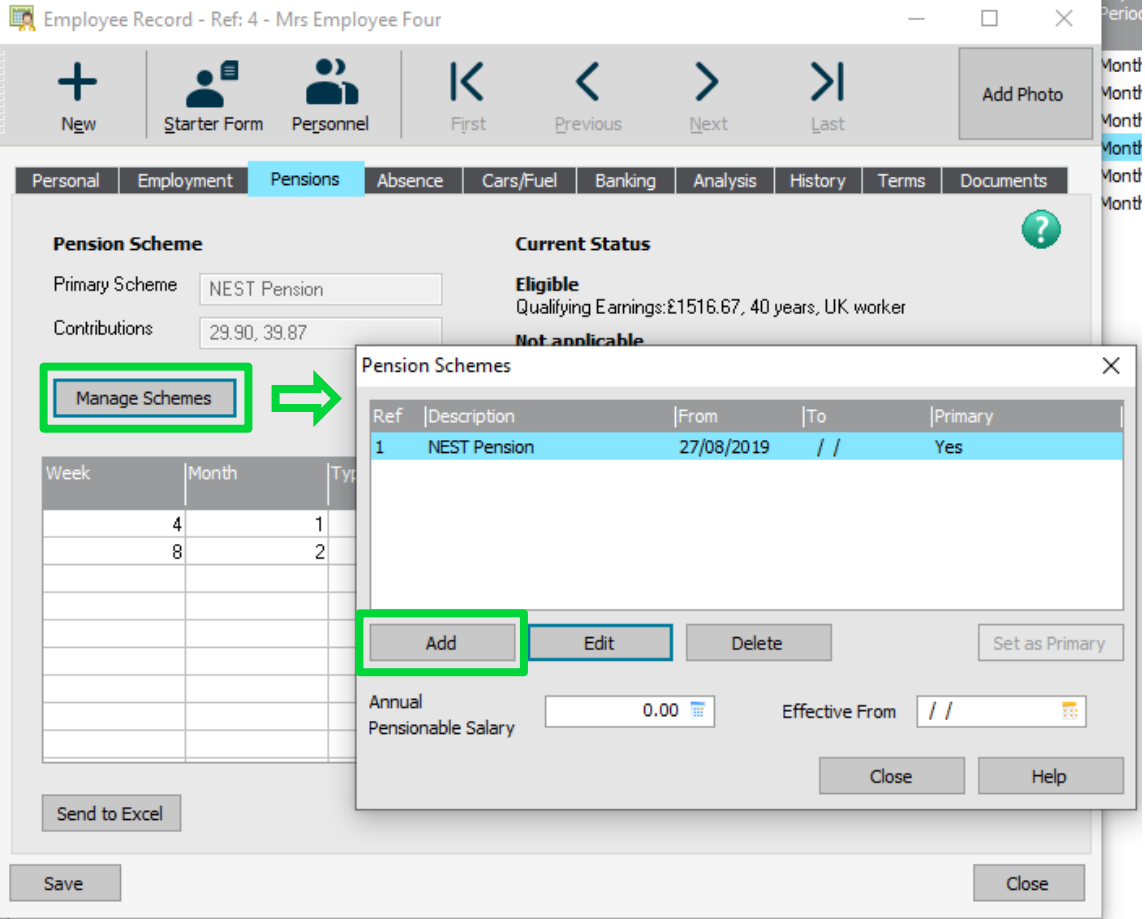


More info – <https://gb-kb.sage.com/portal/app/portlets/results/viewsolution.jsp?solutionid=200427112348150>

Re-enrolment

Manual process

- Manually assess your employees
- Assign pension scheme to any eligible employees who are not currently in a scheme
- Download email template to send to employees from TPR website



Re-enrolment using the Pensions Module



Re-enrolment settings

Sage Payroll Pensions Module

Settings

Duty Start Date
01/07/2019

TPR registration due by
2 December 2019

[Manage Cyclical Re-enrolment settings](#)

Sage Payroll Pensions Module

Manage cyclical re-enrolment settings

Cyclical re-enrolment date ?
Your company cyclical re-enrolment date:
01/07/2022

Your window to complete re-enrolment:
01/04/2022 - 30/09/2022

Re-enrolment exclusions ?
Employees who opted out or ceased membership of a qualifying pension scheme within the last 12 months of your cyclical re-enrolment date:
Include in assessment

Individual employee exclusion reasons (Optional) ?
Set an exclusion reason for an employee to exclude from assessment for automatic enrolment and cyclical re-enrolment.
[Manage Employee Exclusions](#)

[Save](#) [Cancel](#)

Check and amend your **Cyclical re-enrolment date** as required

Choose whether or not to re-enrol employees who opted out or left your qualifying pension scheme in the 12 months prior to your re-enrolment date

Re-enrolment

Employees must be assessed in the **same tax period** as your re-enrolment date.

If the re-enrolment date is **after** the assessment date, contributions will be deducted from the next pay period and the first contributions will include a **pro-rata** amount.

Example:

- Employees paid **monthly** on last day of month. Re-enrolment date **1 Dec**.
- Run Pension Assessment on **30 Nov** to re-enrol eligible jobholders who previously opted out or left your pension scheme.
- Pension contributions will be deducted from **31 Dec**, with first contribution including pro-rata amount for the period 1-5 Dec.

Tax Month 8 6 November – 5 December 2022

Week	Wed	Thu	Fri	Sat	Sun	Mon	Tues
31					6	7	8
32	9	10	11	12	13	14	15
33	16	17	18	19	20	21	22
34	23	24	25	26	27	28	29
35	30	1	2	3	4	5	

Re-enrolment

Sage Payroll Pensions Module

You have reached your cyclical re-enrolment date

You must confirm or change the settings below and continue to assessment within your cyclical re-enrolment window.

You can find out more from the Pension Centre.

Cyclical re-enrolment settings

Your company cyclical re-enrolment date: **01/07/2022**

Your window to complete re-enrolment: **01/04/2022 - 30/09/2022**

Employees who opted out or ceased membership of a qualifying pension scheme within the last 12 months: **Include in assessment**

I'm happy the settings are correct and am ready to proceed.

Proceed **Close**

Sage Payroll Pensions Module

Pension Assessment

15 employees
Process Date: 30 June

From the Pension assessment window, you can view your employees' automatic enrolment status and contributions. Any eligible employees are automatically enrolled for you and you can also postpone or opt in or out any employees with the relevant documentation.

Opt-in/join... Opt-out/leave... Postpone... View: **Changed this period (4)** Quick search...

	Name	N	NI	Time	Status	Scheme	Employee	Employer	Refunds	Total
<input checked="" type="checkbox"/>	• Eligible Jobholder cyclically re-enrolled this period									
<input checked="" type="checkbox"/>	Employee Twelve	12	NA021323A	Eligible	Auto-enrolled	My Pension Scheme	5% (£0.00)	3% (£0.00)	£0.00	£0.00
<input checked="" type="checkbox"/>	Employee Thirteen	13	NH763453A	Eligible	Auto-enrolled	My Pension Scheme	5% (£0.00)	3% (£0.00)	£0.00	£0.00
<input checked="" type="checkbox"/>	Employee Fourteen	14	NY564747B	Eligible	Auto-enrolled	My Pension Scheme	5% (£0.00)	3% (£0.00)	£0.00	£0.00

Swap Clear

Employees included: **4** Payment: **£0.00**

Close

Re-enrolment

Sage Payroll Pensions Module

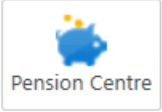
Cyclical re-enrolment

You have now assessed your employees for cyclical re-enrolment.

You must now:

- Complete your **re-declaration of compliance** on The Pensions Regulator website. You must do this before the deadline.
- Send new member enrolment files to your pension provider. To do this use **Send Pension Data**.
- Write to any employees that you re-enrol within six weeks of your re-enrolment date to inform them. To do this use **Send Pension Correspondence**.

You can find more information about completing your cyclical re-enrolment duties from the Pension Centre.

 Pension Centre

[Close](#)

Sage Payroll Pensions Module

Send pension correspondence

29 correspondence items
Process Date: 30 June

From this window you can view letters which are due to be sent to employees for automatic enrolment and the date by which they're due. You can either print the letters or send them direct to your employees via email.

To view letters that have already been sent, click one of the historic tabs.

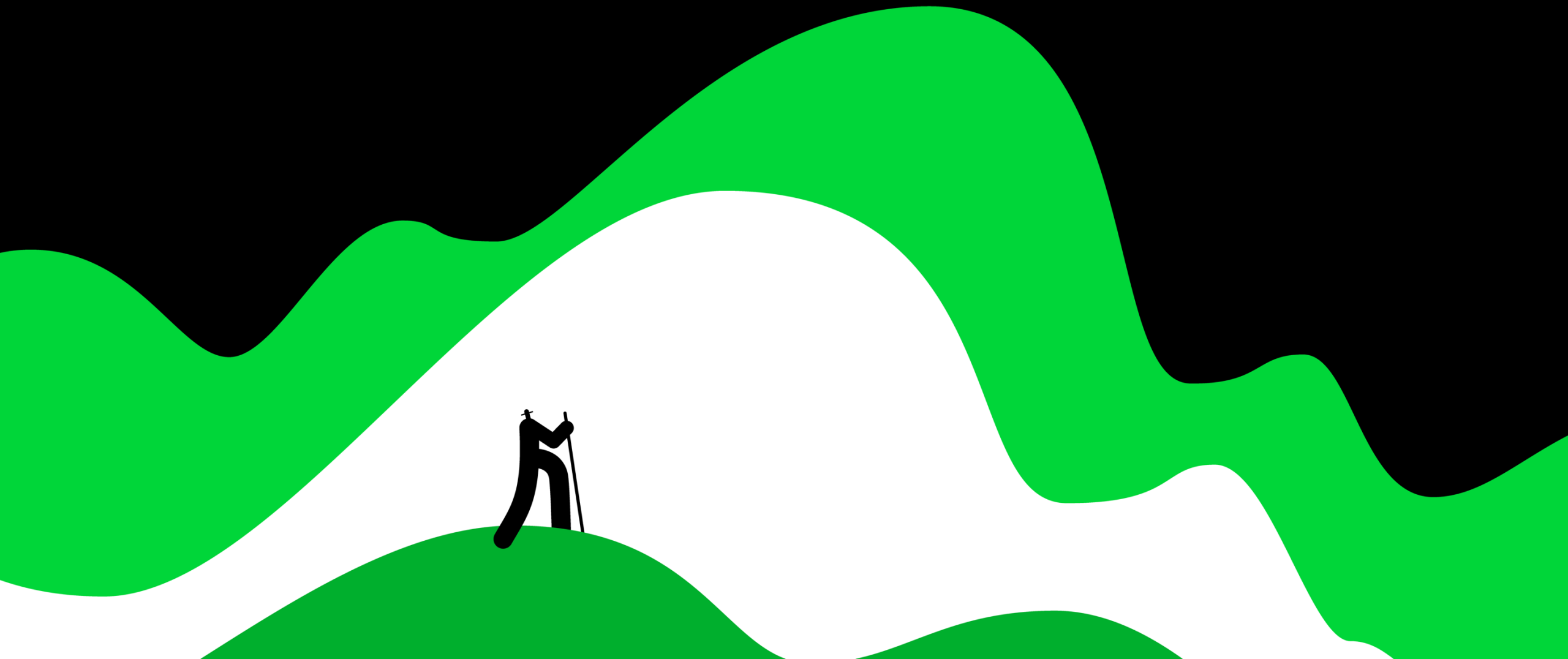
View: All (4)

Letters to be sent - (4)	Ref	Employee	NI	Item	Format	Due by
<input type="checkbox"/>	2	Employee Two	JE875764C	Automatic Enrolment Re-enrolment Notice	Print	12/08/2022
<input type="checkbox"/>	12	Employee Twelve	NA021323A	Automatic Enrolment Re-enrolment Notice	Print	12/08/2022
<input type="checkbox"/>	13	Employee Thirteen	NH763453A	Automatic Enrolment Re-enrolment Notice	Print	12/08/2022
<input type="checkbox"/>	14	Employee Fourteen	NY564747B	Automatic Enrolment Re-enrolment Notice	Print	12/08/2022

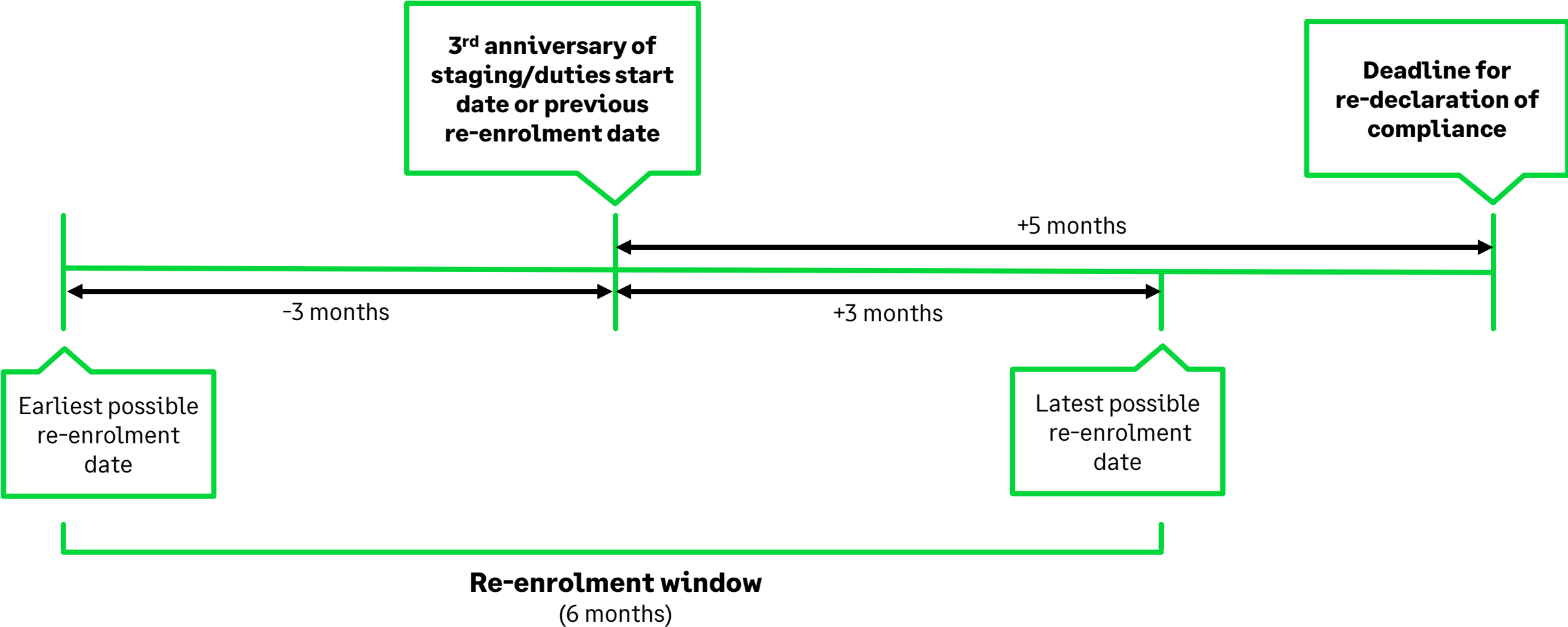
View historical by date

View historical by employee

Re-declaration



Re-declaration



Re-declaration

You must complete and submit your re-declaration of compliance within five months of the third anniversary of your automatic enrolment duties start date or staging date.

This is done via TPR website.

Complete your re-declaration of compliance by your deadline

You must complete and submit your re-declaration of compliance within five months of the third anniversary of your automatic enrolment duties start date or staging date. Your re-declaration deadline doesn't change if you chose a different date to assess your staff.

Your re-declaration of compliance is an online form for you to tell us how you have met your legal duties.

Even if someone else (a member of staff, or a business adviser) has helped you with your duties, and may even be completing the re-declaration for you, it is your legal duty as the employer to make sure that the re-declaration is completed on time and the information entered is correct. If not, you may be subject to fines.

If you have all the relevant information to hand it can take as little as 15 minutes to complete your re-declaration.

Once you have completed your re-declaration of compliance you still have [ongoing duties](#) towards your staff.

Start your re-declaration now

Although you have five months to complete your re-declaration, we recommend that you do this as soon as possible after the third anniversary of your duties start date or staging date. You will need your PAYE reference and either your lettercode or your accounts office reference number to get started.

[Start your re-declaration](#)

Example of re-declaration deadline

Duties start date or staging date	1 June 2016
Third anniversary of your duties start date or staging date	1 June 2019
Re-declaration deadline	31 October 2019

Supporting resource

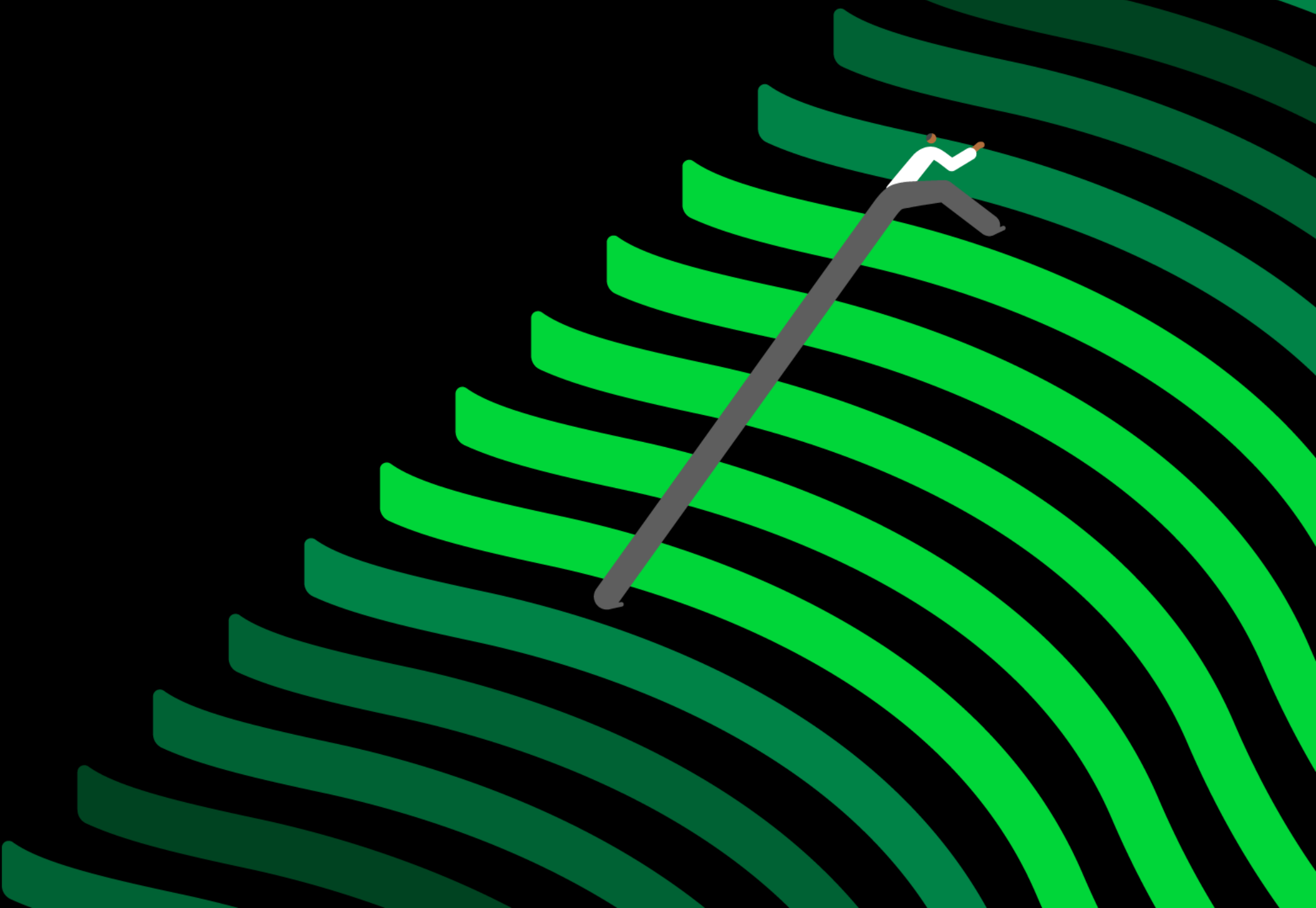
[automatic-enrolment-online-reregistration-checklist](#)

PDF 141KB



More info – [The Pensions Regulator website](#)

Quiz



Further support



Help Centre

www.sage.co.uk/help

- Search our knowledgebase
- Support guides
- Webinars
- Videos
- Get in touch

The screenshot shows the Sage Help Centre website. At the top, there is a navigation bar with the Sage logo and links for 'Help Centre', 'Products', 'Integrated Apps', 'Sage University', and 'Useful links'. Below this is a secondary navigation bar with 'Sage 50cloud Payroll', 'Hot topics', 'Manage your account', 'Free training', 'Sage City', and 'Webinars'. The main header area features the text 'You need help. We have answers.' and a search bar with the placeholder text 'Search for answers...'. To the right of the search bar is an illustration of a desk with a computer monitor, keyboard, and a person's head. Below the header, there is a section titled 'What do you need help with today?' which contains six cards, each with an icon and a title: 'Pensions', 'Online Services', 'Processing your payroll', 'Correcting mistakes in payroll', 'Payroll year end 2022', and 'Statutory payments and holidays'. Each card includes a brief description and a right-pointing arrow.

It takes **more than software and solutions** to make a business work.

That's why we created **Sage Membership**, so you can grow and learn, from a community of real business experts.

What is Sage Membership ?

Sage University – [Sageu.com](https://www.sageu.com)

Sage City – [Sagecity.com](https://www.sagecity.com)

Sage Masterclass

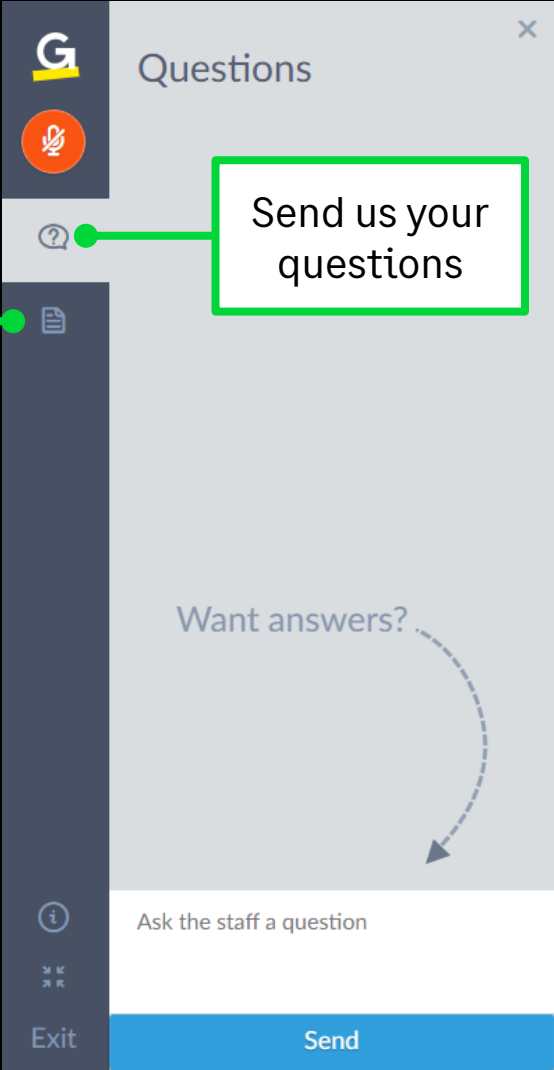
Visit [sage.com/uk/masterclass](https://www.sage.com/uk/masterclass) to find out more


Questions

Submit your questions in the Q&A now!

Download a handout

Send us your questions



 This part of the webinar has no sound.



Thank you!

