

Automatic enrolment checklist

Visit our step-by-step guide regularly to make sure you're fully prepared to meet your automatic enrolment duties.
www.tpr.gov.uk/aeguide

Allow up to 12 months to prepare for automatic enrolment. Use this checklist to keep track of your progress. Please note that, if you don't have to automatically enrol any staff, you may not need to complete every step. However, you will still have tasks to complete.

What you need to do	Details	<input checked="" type="checkbox"/>
Know your staging date	Find out the date your automatic enrolment duties come into effect for you. This is known as your staging date.	<input type="checkbox"/>
Provide a point of contact	Tell us who we can contact with information about your automatic enrolment duties.	<input type="checkbox"/>
Check who you need to enrol	Check if you'll need to automatically enrol any of your staff. This will help you plan what you need to do next.	<input type="checkbox"/>
Create your action plan	Create a plan to help you make sure you meet your automatic enrolment duties in time.	<input type="checkbox"/>
Work out your costs	Work out how much your regular pension payments and setup costs are likely to be.	<input type="checkbox"/>
Check your records and payroll process	Check your records and choose the best way to keep track of these once your duties take effect. Ensure that your payroll process will work with automatic enrolment.	<input type="checkbox"/>
Choose a pension scheme (or check your existing one)	If you already offer your staff a pension scheme, make sure it can be used for automatic enrolment. If it can't, now is the time to find a different one.	<input type="checkbox"/>
Assess and enrol your staff	Enrol your staff into the pension scheme(s) you're providing for them.	<input type="checkbox"/>
Write to your staff	You must write to your staff to let them know how automatic enrolment applies to them within six weeks of your staging date.	<input type="checkbox"/>
Your ongoing automatic enrolment duties	Pay regular contributions, keep records of your automatic enrolment activities and monitor the ages and earnings of your staff (including new starters) and enrol them if they become eligible.	<input type="checkbox"/>
Complete your declaration of compliance	Let us know how you've met your automatic enrolment duties by completing your declaration of compliance. Even if you haven't had to automatically enrol anyone, you must still complete your declaration.	<input type="checkbox"/>

This checklist is designed to help you comply with your legal duties under the Pensions Act 2008 and Regulations. While we can offer guidance, this checklist should not be regarded as a substitute for, or definitive interpretation of, the law. So if you have any doubts about your legal duties then you should seek legal or other specialist advice.