

# SimplyEnrol Auto Enrolment Planner



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As an employer, there's a lot you need to do to get your business ready for auto enrolment in time for your staging date. Working with Workplace Pensions Gateway Limited and using the SimplyEnrol Auto Enrolment Planner makes that job a lot easier.

This planning tool is suitable for employers with more than 3 months to go before their staging date.

If you have less than 3 months until your staging date please use our 'Essentials' service to ensure urgent plans are put in place so you avoid a fine and stage successfully - you've almost run out of time!

## How does it work?

### Tells you what to do and when

The planner creates a task list of the actions and decisions you'll need to take to get ready in time for your staging date, based on a plan customised by Workplace Pensions Gateway Limited, making it easier for you to meet your targets and stay on track.



### Keeps you informed

The planner provides relevant information in a clear and user-friendly format, and points you towards useful resources, when needed, to help you complete each task efficiently.

### Keeps you on schedule

You will receive automated email updates each week that remind you of upcoming tasks and flag any that need your urgent attention.

## Tailored to your business

You can add, remove or customise any of the tasks you need to complete. The timescales of your plan will be tailored, based on how long you have to go until staging.

## Easy to share

Share the plan with the people in your business you need to help you stage successfully.

## Task overview

The Simplyenrol Auto Enrolment Planner has been customised by Workplace Pensions Gateway Limited offering 14 phases with tasks to be completed in each phase and tips to help support you through the process of preparing for your staging date.

The phases included in the plan are as follows;

- Free Tasks
- Your staging date
- Initial workforce assessment
- Review pensions arrangements
- Agree proposed pension strategy
- Initial employee communications
- Implement process and system changes
- Prepare process and system changes
- Prepare pension arrangements
- Employee Communications
- Enrol employees
- Declaration of Compliance
- Ongoing actions
- Record keeping