

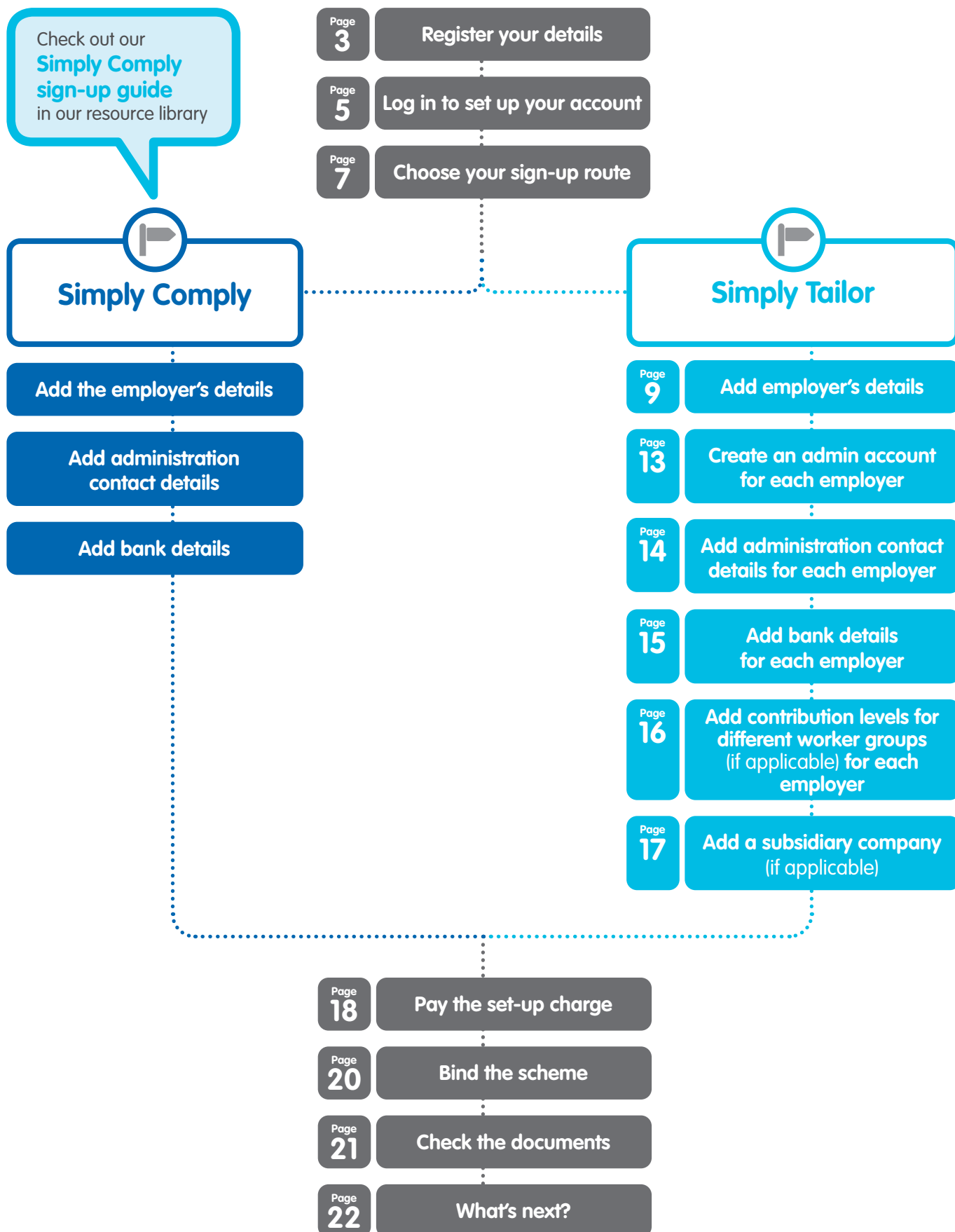
# Signing up with The People's Pension

## Simply Tailor sign-up route

This guide is designed to help you sign up with The People's Pension using our online sign-up service. We have two different sign-up routes – Simply Tailor and Simply Comply.

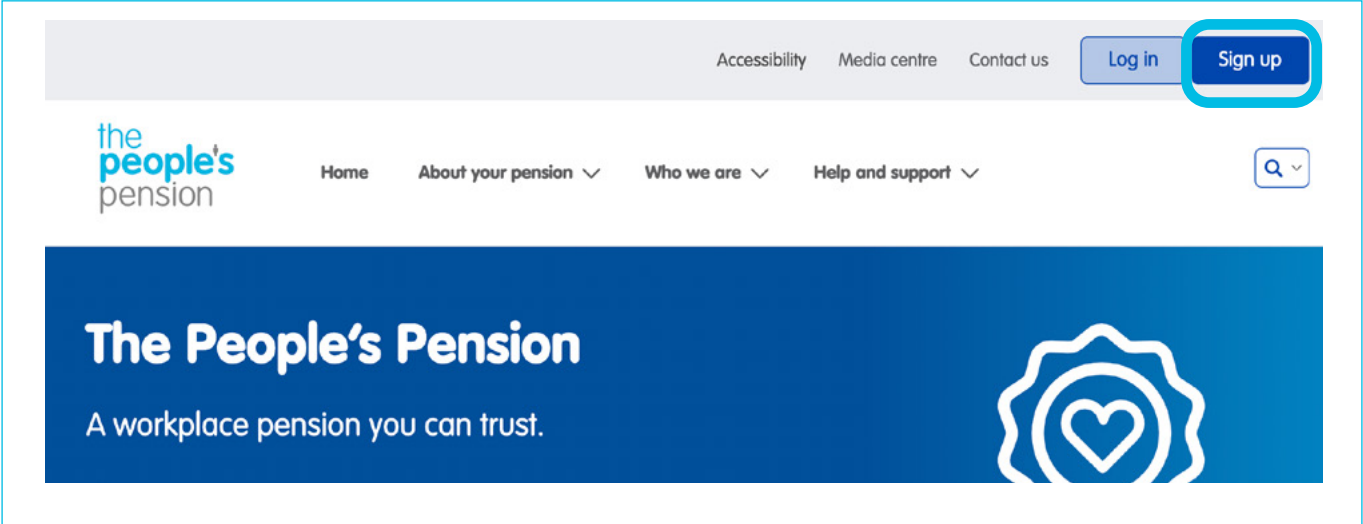
This guide will help you with our Simply Tailor route. Simply Tailor is our bespoke sign-up route designed to give the employer total control and flexibility. It may take a little longer to set up but allows different options that may best suit the employer's needs.






# Register your details


Visit our website [www.thepeoplespension.co.uk](http://www.thepeoplespension.co.uk) to sign up with us. Click 'Sign up' in the top right corner.



# Register your details continued

The first step is to register your email address with us. You'll then need to register your details.



 Help & support

## Register your details here

Please tell us the email address you would like to use for registration and future log in.


Email address:  \*


Confirm email address:  \*

**Need more info?**

Not sure whether you can register for The People's Pension online? [Click here](#) to see who can sign up and when.

**Next**



 Help & support

## Register your details here

Please complete the information below to complete your registration.

Your email address:

Are you an employer or are you a third party/adviser acting on behalf of an employer?


\*

Title:  \*

Forename:  \*


Surname:  \*

Telephone number:  \*

Postcode:  \*  **Find Address**

**Submit**

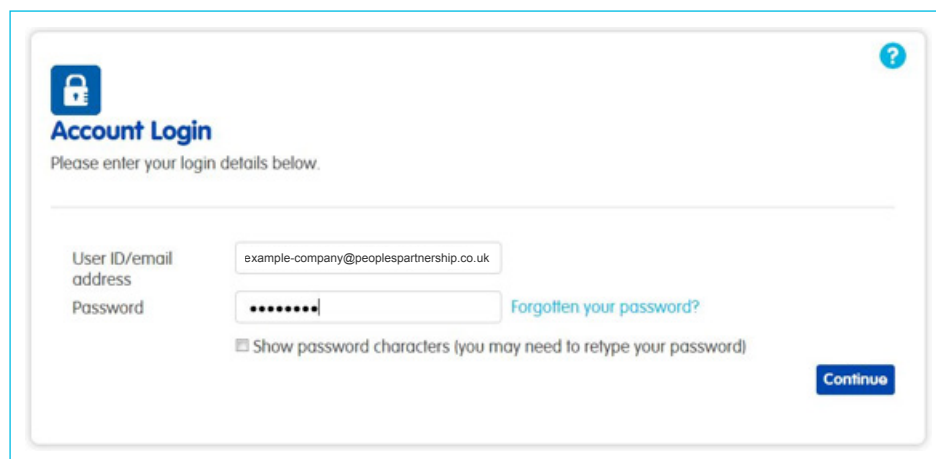
Select whether you're an employer (or an employee signing up on behalf of the owner), or a third party/adviser.

Click on the  icons for more information.

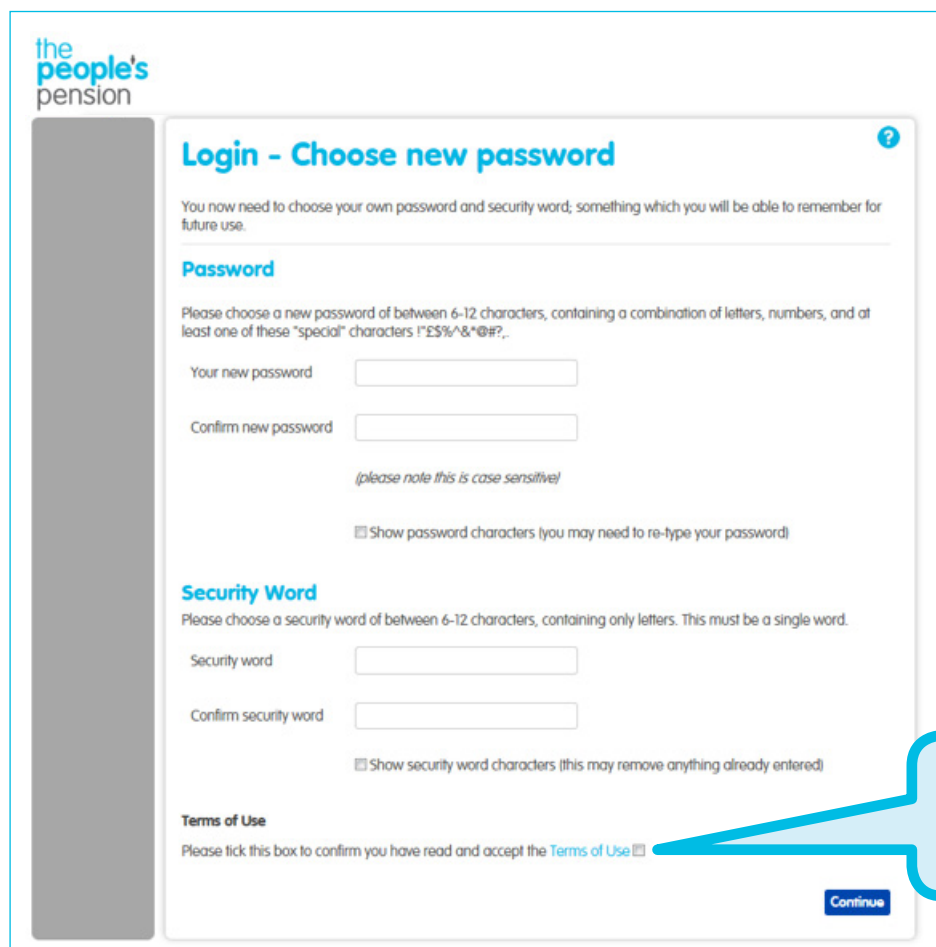
Once you've completed your details and submitted them to us, we'll send you an email with your login details. Then you can click the link in the email to set up an account with The People's Pension.

# Set up your account

The link in your email will take you to our login page. Enter your email address and the temporary password we sent you and click 'Continue'.



The 'Account Login' form features a blue padlock icon and a title 'Account Login'. Below the title is the instruction 'Please enter your login details below.' The form contains two input fields: 'User ID/email address' with the placeholder 'example-company@peoplespartnership.co.uk' and 'Password' with masked characters. A 'Forgotten your password?' link is positioned to the right of the password field. A checkbox labeled 'Show password characters (you may need to retype your password)' is located below the password field. A blue 'Continue' button is at the bottom right. A help icon (?) is in the top right corner.



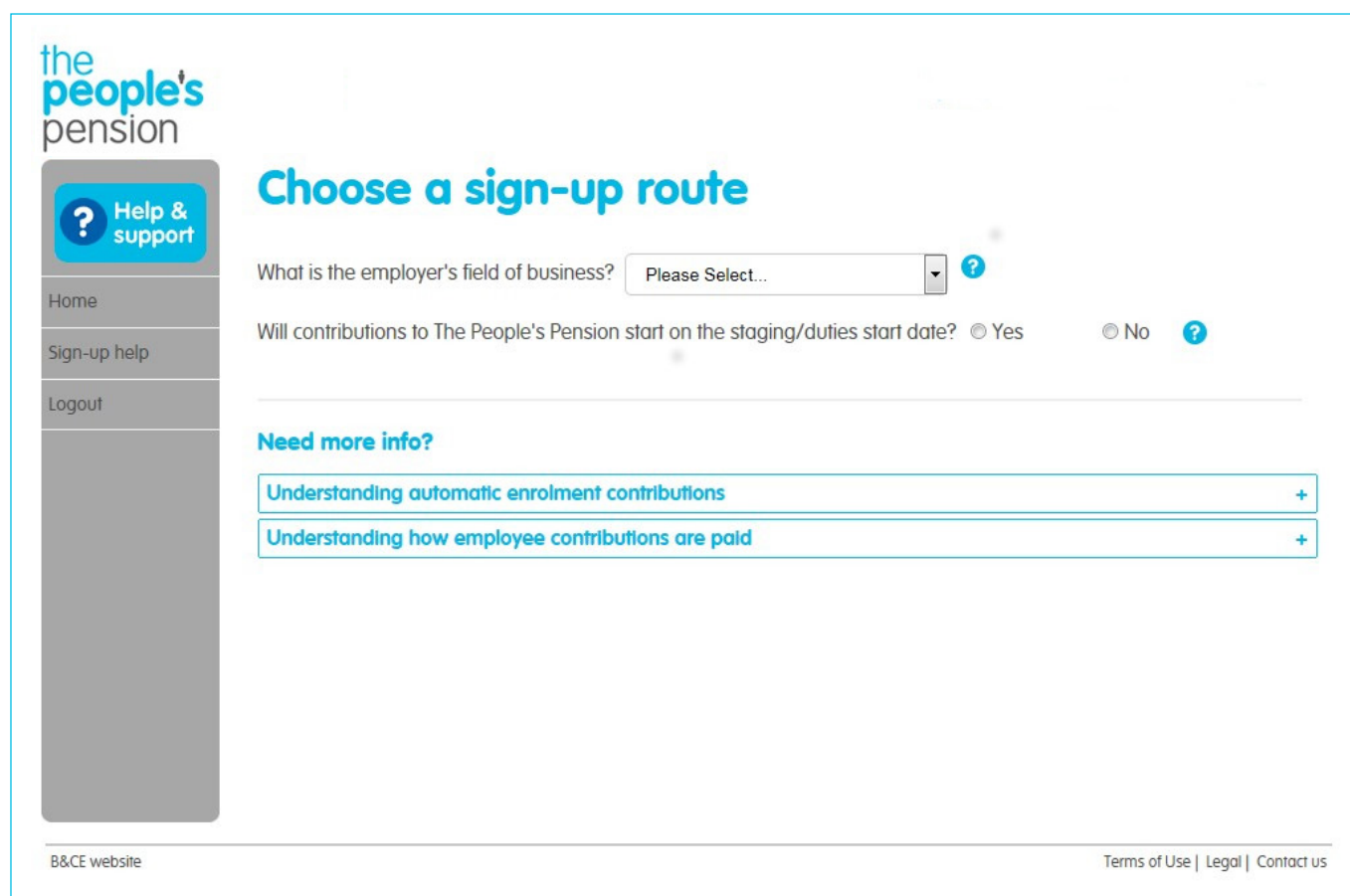
The 'Login - Choose new password' form is part of 'the people's pension' system. It includes a sidebar with the company logo. The form title is 'Login - Choose new password'. The instructions state: 'You now need to choose your own password and security word; something which you will be able to remember for future use.' The 'Password' section requires a new password of 6-12 characters with specific requirements, followed by a confirmation field. A note '(please note this is case sensitive)' and a checkbox 'Show password characters (you may need to re-type your password)' are present. The 'Security Word' section requires a 6-12 character word containing only letters, followed by a confirmation field. A note 'Show security word characters (this may remove anything already entered)' is included. At the bottom, the 'Terms of Use' section asks the user to tick a box to confirm they have read and accept the 'Terms of Use'. A blue 'Continue' button is at the bottom right. A help icon (?) is in the top right corner.

Make sure you've read the Terms of Use before ticking this box.

# Set up your account continued

After you've entered your new password and security details and read our Terms of Use, click 'Continue'.

We'll ask you some questions about the employer to help us determine if our simplified sign-up route would be an option for you.



The screenshot shows the 'the people's pension' website's sign-up interface. On the left is a sidebar with a 'Help & support' button (marked with a question mark) and links for 'Home', 'Sign-up help', and 'Logout'. The main content area is titled 'Choose a sign-up route'. It contains two questions: 'What is the employer's field of business?' with a dropdown menu currently showing 'Please Select...' and a help icon; and 'Will contributions to The People's Pension start on the staging/duties start date?' with radio buttons for 'Yes' and 'No', and a help icon. Below these questions is a section titled 'Need more info?' containing two expandable links: 'Understanding automatic enrolment contributions' and 'Understanding how employee contributions are paid', each with a plus sign icon. At the bottom of the page, there is a footer with 'B&CE website' on the left and 'Terms of Use | Legal | Contact us' on the right.

If the employer's field of business is in the construction industry, we'll ask if they follow the CIJC (Construction Industry Joint Council) Working Rule Agreement. To find out more, please take a look at our guide to operating the Working Rule Agreement at <http://thepeoplespension.co.uk/wp-content/uploads/2016/06/CIJC-Automatic-enrolment.pdf> alongside auto-enrolment.

If the employer follows this agreement, our Simply Comply sign-up route won't be an option, so we'll direct you straight to our Simply Tailor route.

# Choose a sign-up route

Our Simply Tailor sign-up route is designed to give the employer total control and flexibility. It may take a little longer to set up but allows different options that best suit the employer's needs.

## Comparison of features

Features	Simply Comply	Simply Tailor
	<p>We complete as much of the account set-up as possible for you to make it easier to sign up and get started. The account will be set up to comply with the minimum automatic enrolment duties.</p> <p>What we will do for you:</p> <ul style="list-style-type: none"> <li>✓ Set up the appropriate employer and employee contribution amounts to meet the legal duties.</li> <li>✓ Reduce the information we require to set up the account to the absolute minimum.</li> <li>✓ Email joining information to employees - be prepared to have email addresses for every employee after the staging date.</li> </ul> <p>What we cannot do for you:</p> <ul style="list-style-type: none"> <li>✗ Delay working out which staff to put into the scheme - this is known as postponement.</li> <li>✗ Set up a salary sacrifice arrangement, operate a fortnightly, four weekly, lunar or 4-4-5 payroll frequency.</li> <li>✗ Allow a choice of paying different contribution amounts.</li> </ul>	<p>We let you set the account up with a full choice of options, allowing for a tailored solution specific to the employer's requirements.</p> <p>What will I be choosing:</p> <ul style="list-style-type: none"> <li>✓ How much will be paid in by the employer and employee.</li> <li>✓ The basis on which payments are made into a people's pension pot - qualifying earnings, pensionable earnings, total earnings or something else.</li> <li>✓ Whether to delay working out which staff to put into the pension scheme - this is known as postponement.</li> <li>✓ As many payrolls and payroll frequencies as required.</li> <li>✓ Varying amounts of contributions for different employees.</li> <li>✓ Whether to start contributing before the staging date.</li> </ul>
Offers postponement	No	You choose
How much will be paid into the pension scheme	Legal minimums	You choose
How often are employees paid	Weekly/monthly	You choose
Can include subsidiaries	No	Yes
One-off set-up charge	£500.00 plus VAT (Reduced charge of £300.00 plus VAT when signing up via a financial or business adviser with a reduced charge code.)	
What support do I get?	<ul style="list-style-type: none"> <li>✓ UK-based call centre open 8.30am - 5.30pm Monday to Friday(only).</li> <li>✓ ASK - online help facility</li> <li>✓ Resource library on our website full of useful information, downloadable guides, and help videos</li> <li>✓ Training mode to practice data uploads - available on the employer account once registered</li> </ul>	
Choose your route	<div>Start Simply Comply »</div> <div>£500 plus VAT*</div>	<div>Start Simply Tailor »</div> <div>£500 plus VAT*</div>

\* One-off set-up charge. Reduced charge of £300 plus VAT when signing up via a financial or business adviser with a reduced charge code.

You'll be given the option of our 'Simply Comply' or 'Simply Tailor' sign-up routes and we've outlined the benefits of each route to help you decide.

# Choose a sign-up route continued

To begin entering the employer's details, click 'Add'.

The screenshot shows the 'the people's pension' sign-up interface. The top left features the logo and a 'Help & support' button. The top right displays the email 'userguide@peoplespartnership.co.uk'. A progress bar at the top indicates '0% complete'. On the left, a sidebar contains links for 'Home', 'Sign-up help', and 'Logout'. The main content area is divided into two sections: 'Employer details' and 'Payroll 1'. Under 'Employer details', there is a green 'Add' button. A blue dotted arrow points from a callout box on the right to this 'Add' button. The 'Payroll 1' section contains a list of tasks: 'Create admin account', 'Create contact details', 'Enter bank details', and 'Enter contributions'.

the people's pension

userguide@peoplespartnership.co.uk

Help & support

Home

Sign-up help

Logout

0% complete

Employer details

Add

Payroll 1

- Create admin account
- Create contact details
- Enter bank details
- Enter contributions

Click 'Add' beneath Employer details



# What we need

We'll ask you for more information about the organisation and its owners to comply with anti-money laundering regulations. The details we request will depend on the company type selected.

## → Public or private limited companies

- Employer name and postcode
- Company registration number

A limited company is registered with Companies House and has a company registration number. They have to submit annual accounts and returns to Companies House.

## → Sole trader

- Employer name and postcode
- Proprietor's name, date of birth and address (including how long they've lived at that address)

A sole trader is a person who owns and controls 100% of a business. There is no distinct separation between the sole trader and the business – the sole trader is personally liable for the debts of the business.

## → Partnership or Limited Liability Partnership

- Employer name and postcode
- Company registration number
- Number of partners
- Whether a partnership agreement exists
- For each partner, their name, date of birth, and address (including how long they've been at the address - we'll need a previous address if this is less than 1 year).
- Number of beneficial owners (that own or control at least a 25% share in the business. If no partnership agreement is in place all partners are seen as equal beneficial owners) and their ownership share.
- Name, address and date of birth for each beneficial owner

A partnership is owned by 2 or more people. If a partnership agreement is in place this will set out the proportion of the business that each partner owns. If no agreement is in place all partners are deemed to have an equal proportion. The partners are personally liable for the debts of the partnership.

A Limited Liability Partnership is registered with Companies House and is required to file annual accounts and returns with them. The members (usually called partners) are separate from the LLP – they're not personally liable for the debts of the LLP.

## → Registered charity

- Employer name
- Charity commission registration
- Charity registration number

An organisation which is registered as a charity with the Charity Commission in the UK.

## → Overseas company

- Country
- Business name
- Registered number
- Registered address

A business that's incorporated and registered outside of the UK but employs staff who are working or ordinarily working within the UK.

## → Government or public body

- Employer name
- Registration number
- Employer's email address

This could be a small local parish council or as big as a political party.

## → College or educational establishment

- Employer name and postcode
  - Registration number
- An educational establishment could also fall under one of the other company types.

## → Individual

- Individual employer's name
- Employer's address and date of birth

An individual may employ a person or several people, usually to perform a service such as a carer or housekeeper. Such an individual would have registered as an organisation with HMRC and would be deducting tax and National Insurance contributions.

## → Unincorporated association

- Employer name and postcode
- Registration number

An unincorporated association is an organisation set up through an agreement between a group of people who come together for a reason other than to make a profit. For example a voluntary group or a sports club. Individual members are personally liable for debts of the organisation.

## → Church body/Place of worship

- Employer name
- Registration number
- Business postcode

# What we need continued

## → Trust Company

- Employer name
- Company registration number
- Business postcode

A legal entity that acts as a fiduciary, agent, or trustee on behalf of a person or business for a trust.

## → Community Interest Company (CIC)

- Employer name
- Company registration number
- Business postcode
- Number of partners
- Whether a partnership agreement exists

A special type of limited company which exists to benefit the community rather than private shareholders.

A limited partnership (LP) exists when two or more partners go into business together, but the limited partners are only liable up to the amount of their investment. An LP is defined as having limited partners and a general partner, which has unlimited liability.

**If you're unsure what company type to select you should check with your accountant or business adviser.**

## What we need continued

### Tell us about your company

We need to know some details about your company so that we can satisfy Anti-Money Laundering Regulations.

If the employer is registered with Companies House, select the same employer type as recorded on the [Companies House website](#). If the employer is not a registered company but is registering because they employ a worker (for example a carer, gardener, cleaner, nanny or support worker), select employer type 'Individual'.

Employer type:  ▼

Employer name:

Company registration number:  ?

Business postcode:

Can be left blank if company registration number provided

Cancel

Save and continue

To comply with Anti-Money Laundering Regulations we need to confirm the identity of employers wanting to join The People's Pension – this includes the employer's beneficial owners and directors. To do this we may use electronic verification through [SmartSearch](#), which reviews publicly available information on companies and individuals. If our checks fail to adequately confirm the employer's identity and beneficial ownership, we may write to the employer to ask for more information.

If you're not sure what your 'Employer Type' is, see pages 9 and 10 of this guide.

Once you've checked the details you've provided, select 'Save and continue'.

## What we need continued

For certain company types we'll carry out a search to find the business and will ask you to confirm we've found the right one.

### Principal employer details

To begin setting up the account, please enter the details for the Principal Employer. This employer will have the legally binding agreement with The People's Pension.

Have more than one employer? [Find out more](#)

Employer name:

Employer type:

Company registration number:  ?

Date of incorporation:  + ?

Postcode:  + [Find address](#)

▼

Address 1:  \*

Address 2:

Town:  +

County:

Telephone number:

Do you have a Staging date or Duties start date? ☐ Staging date ? ☒ Duties start date ?

Duties start date:  ▼  ▼  ▼ \*

Total number of employees:  \* ?

Approximate number of employees to be enrolled:  \* ?

Are there any pension schemes being administered other than those with B&CE?  ▼ \* ?

How tax relief works:  ?

[Cancel](#) [Save and continue](#)

You'll need to include information about employees and how they're paid.

Once you're happy with the details provided select 'Save and continue'.

# Creating an admin account

We'll ask you to create an admin account.

You should set up an admin account for each payroll. For example, if the employer has a weekly and a monthly payroll, you'll need to set up 2 admin accounts.

the people's pension

userguide@peoplespartnership.co.uk

20% complete

**Employer details 1 of 1 (Principal account)**

Employer name	Test
Address	People's Partnership Limited, Manor Royal, CRAWLEY, West Sussex RH10 9QP
Company registration number	12345678
Duties start date	01/01/2019
Tax basis	Net

**Payroll 1**

- Create admin account
- Create contact details
- Enter bank details
- Enter contribution details

**Create admin account**

Please tell us about your payroll. Payrolls will be known as Admin Accounts and there will be one Admin Account for each payroll you have.

Name of your Admin Account:

How often are employees paid?

In which pay period will the first deduction of pension contributions be taken? Start Date:  End Date:

Joiner Pack Delivery:

Employer name to be displayed on joiner packs:

Payroll package:

**Create admin account**

**Add**

**Amend employer**

**Delete entire payroll**

**Cancel**

**Save and continue**

If you have subsidiary employers to set up you'll be able to add these after you've added the first (principal) employer.

If the employer's payroll provider is not helping to work out who needs to be enrolled and how much the contributions should be, we can help. Just select 'The People's Pension'.

For each admin account we'll ask you about how often employees are paid, when the first contribution will be made and information about the payroll software provider. We work with most payroll providers and if the employer doesn't have one they can still use The People's Pension.

# Adding an administration contact

Once you've entered these details and clicked 'Save and continue', the first stage of setting up the account is complete. We'll then need you to add contact details for the person who will be administering this account – often somebody that works for the employer.

**the people's pension** userguide@peoplespartnership.co.uk

**Help & support**

Home  
Sign-up help  
Logout

30% complete

**Employer details 1 of 1 (Principal account)**

**Add subsidiary**  
**Amend employer**

Employer name: Test  
Address: People's Partnership Limited, Manor Royal, CRAWLEY, West Sussex RH10 9QP  
Company registration number: 12345678  
Duties start date: 01/01/2019  
Tax basis: Net

**Payroll 1**

**Admin account details**

Name	Pay frequency	Start date	Joiner pack delivery	Employer name on joiner pack	Payroll package	Assessment
Test Test	Monthly	01/01/2019	Via Email	Test	Test	Payroll/HR Provider

**Amend**

**Create contact details**

**Add**

Enter bank details  
Enter contribution details

**Delete entire payroll**

**Create contact details**

Please tell us about the person who will be administering this account, including uploading employee data files.

Select existing contact to use: **Please select**

Title: **Please select**

Forename:

Surname:

Postcode:  **Find address**

Address 1:

Address 2:

Town:

County:

Job title:

Telephone:

Mobile:

Email:

Third party adviser?: ☐ Please tick if this contact is an intermediary

\* Denotes mandatory field

**Cancel** **Save and continue**

If you've already provided us with contact details, you'll have the option to select the existing contact.

This person will receive access to the account as well as emails and notifications about the pension scheme.


When you're ready, click 'Save and continue'.

# Adding bank account details

Once you've added contact details we'll ask for some bank details. These details will be used for the payment of contributions to employees' pension pots. The administration contact will have the option to select when they would like to make a payment once the account has been set up.

Instruction to your bank or building society to pay by Direct Debit

Tell us about the bank account to be used for the payment of pension contributions.

 / queries contact our Helpdesk No: 0800 612 8080  
It need your account details, which can be found for example on your bank statement, to complete the Direct Debit Instruction.

\* Denotes mandatory field

Bank details

Description:  \*

Sort code:  -  -  \*

Account number:  \*

Account name:  \*

Signatory details

Title: 

Please select ---

 \*

Forename:  \*

Surname:  \*

You can read the Direct Debit Guarantee by clicking here

Cancel

Save and continue

We'll fill in the bank's name and address based on the sort code you provide. Don't worry – this may not be your local branch.

If you're not the only signatory required to authorise a Direct Debit please select 'No'. You can still input bank details but you'll need to print this out for signing later. This can then be emailed back to us.

If you're happy with the details you've entered, click 'Save and continue'.

# Contribution details – add worker groups

Lastly, we need you to add contribution details.

● Enter contribution

**Add**

You can add as many different contribution levels as required for different sections of employees.  
Once completed, additional payrolls can be added.

Contribution details

Tell us about the pension contribution levels that will be made for each group of employees. Each group will be known as a worker group.

Worker group ID:  + ?

Description:  + ?

Earnings basis:  + ?

Employer contribution (%):  + ?

Employee contribution (%):  + ?

If employee contributions will be paid **net** of basic rate tax, the **gross** equivalent must be entered here.

**Need more info?**

[Understanding automatic enrolment contributions »](#)

[Understanding how employee contributions are paid »](#)

[Using salary sacrifice / salary exchange? »](#)

## Worker groups

A worker group is a group of employees who have the same contribution level. The worker group ID is needed when employee data is submitted.

With our Simply Tailor route you can set up as many worker groups as you like. For example, the employer may have a group of employees contributing 5% of their salary and another group contributing 7%, so they'll need 2 worker groups.

## Earnings basis

This describes the basis of the employee's earnings being used to calculate pension contributions. There are 4 main definitions: Qualifying earnings, Set 1: pensionable earnings, Set 2: pensionable earnings and Set 3: total earnings. Click on the ? icon for more information about this.



# Contribution details – add more worker groups, payrolls and subsidiary employers

 **Contribution details**

Worker group id	Description	Earnings basis	Employer contribution	Employee contribution
Directors	Tier 1	Qualifying Earnings	15.00%	10.00%

Add

Amend

If you'd like to add more Worker groups click 'Add'.

If you're signing up on behalf of a group of employers you can add other employers by selecting 'Add subsidiary'.

**Employer details 1 of 1 (Principal account)**

Employer name	Mrs A B
Address	Manor Royal, CRAWLEY, W Sussex, RH10 9QP
Company registration number	
Staging date	01/10/2016
Tax basis	Net

Add subsidiary

Amend employer

For each subsidiary employer you can add:

- an admin account (for each payroll)
- admin contact
- bank details
- contribution details.

We'll save you some time by giving you the option to select the details you've entered for the first employer (the principal employer account).

You can add as many subsidiary employers as you need – scroll through the employers you've added using the buttons.

← Previous

Next →

## Does the business run more than one payroll? Perhaps a weekly and a monthly payroll?

For each payroll – create an admin account and add an administration contact, bank details and contribution details. We'll give you the option to select the details you've previously entered for other payrolls to save you time.

You'll be able to look between the payrolls you've set up using the tabs along the top.

Payroll 1

Payroll 2

# Set-up charge

70% complete

## Set-up charge

One-off sign up charge

### Reduced charge code

[What's this?](#)

If you received a reduced charge code from your adviser, please enter it below.

[Apply code](#)

Contains 7 characters including numbers and letters  
e.g. ANI-7G29

**Don't have a code?**

[Continue without code](#)

You will not get another opportunity to enter a code once you have made payment.

B&CE website [Terms of Use](#) [Legal](#) [Contact us](#)

We'll ask for payment of the one-off set-up charge. This is £500 + VAT, or if you have a reduced charge code you can enter it here.

If you're a financial adviser, federation or business adviser (such as an accountant or bookkeeper):

1. log in to the Adviser Centre
2. get your reduced charge code
3. share it with your clients.

70% complete

## Set-up charge

One-off sign up charge

### Reduced charge code

[Add a code](#)

### Summary

Set up charge	£500.00
Discount <a href="#">Add reduced charge code</a>	N/A
You will not be able to enter a code once you've paid.	
Sub total	£500.00
VAT	£100.00
<b>Total to pay</b>	<b>£600.00</b>

[Pay by Direct Debit](#) [Pay by card](#)

Please note: if you choose to pay by card, this will be processed by Global Payments. Take a look at their [website](#) for more information on how they handle your data.

If you choose to pay by Direct Debit, we'll give you the option to select the account details (for the employer's bank account) you've already given us. Payment will be taken on the 12th working day after we've activated the Direct Debit.

You can get a copy of the VAT invoice receipt in the 'Account transactions' section of the Online Account. We'll email a copy to you (and the admin contact you added to the account).

# Set-up charge

If you choose to pay by card, we'll ask you for some information on who the card is registered to.

Once payment has been authorised, you'll see a message confirming payment has been successful.

The screenshot shows a web form titled "Enter your billing information" with a progress bar indicating "80% complete". The form is part of a payment setup process. On the left, there is a sidebar with a "Help & support" button and links for "Home", "Sign-up help", and "Logout". The main content area contains the following fields and instructions:

- A dropdown menu for "Use your existing details?" with the option "Please select".
- A text input field for "Cardholder's email address\*".
- A note: "Please fill out at least one contact number below that is registered to the card\*".
- Text input fields for "Cardholder's home number", "Cardholder's mobile number", and "Cardholder's work number".
- Text input fields for "Cardholder's billing address line 1\*", "Cardholder's billing address line 2", and "Cardholder's billing address line 3".
- A text input field for "Cardholder's billing city\*".
- A text input field for "Cardholder's billing postcode\*".
- A dropdown menu for "Cardholder's billing country\*" with the option "Please select".
- A note: "\*Mandatory fields".
- At the bottom, there are two buttons: "Back" and "Continue to payment".

The footer of the page includes "B&CC website" on the left and "Terms of Use | Legal | Contact us" on the right.

# Agree to bind the scheme


After payment has been authorised you'll need to read our terms and conditions. We'll ask you to 'bind' the employer to the scheme. This means that you agree to enter into a legal and binding contract with People's Partnership (provider of The People's Pension).

You'll need to ensure you have the appropriate authority to do this before proceeding. We provide some guidance notes on this but if you're still unsure if you have the appropriate authority you should select 'No' from the drop-down list. The person with the appropriate authority will need to bind the scheme before set-up is complete. We'll request this person's details on the next screen and will email them to request that they bind the scheme.

90% complete

✔ Payment authorised

Please now complete the agreement below.



**Confirmation (Terms and Conditions)**

Please read the statements below and follow the instructions to fill in the necessary information.

The Principal Employer wishes to be admitted to participation in The People's Pension (the 'Scheme'). It is also desired that those of the subsidiaries and associated companies of the Principal Employer that have employees who are from time to time eligible to join the Scheme should be admitted to participation in the Scheme. The Principal Employer on its own behalf and on behalf of each of any of its subsidiaries or associated companies to be so admitted therefore agrees that it and all such companies will be bound by and comply with the provisions of the Scheme Rules in force from time to time ([click here to view a copy of the current Scheme Rules](#) - opens in new window).

**Who has authority to bind?**

Any person who is authorised to enter into contracts on behalf of the Principal Employer either:


- directly by means of an authority vested in them by the company's articles of association, partnership agreement or other constituting document (as appropriate), or
- by delegation under a power contained in that constituting document, or
- a person within that organisation who otherwise has authority to enter into contracts on behalf of the organisation.

**You must ensure you have the necessary authority before proceeding. An agreement to bind can only be signed by a person who is authorised to enter into contracts on behalf of the Principal Employer. If you do not have the authority to enter into a contract on behalf of the Principal Employer you must answer 'no' to the question below.**

If you answer 'no' to the question below:

- you will be asked to supply the details for a person with authority to bind
- the authorised person will then receive an email outlining the process to allow them to authorise the binding of the Principal Employer to the Scheme.

Do you have the authority to bind the Principal Employer?

Please select 


If you're a financial adviser, federation or business adviser (such as an accountant or bookkeeper), you're unlikely to have this authority.


If you do have the authority to bind the employer please select 'Yes' then read the terms carefully before entering your name at the bottom and selecting 'I agree to bind the employer'.


# Review the documents

After a few moments we'll produce some documents that you'll need to download. These are also available in the 'Documents' section in your Online Services account. You should click 'Continue' once you've downloaded all documents.


100% complete

 **Documents**


 **Set-up complete**  
You have now set up an account with The People's Pension.



**Letter of Agreement**  
This is a summary of information supplied.



**Direct Debit Mandate**  
This is a copy of the Direct Debit instruction to the bank that has been designated for payment of pension contributions. **This needs to be printed, signed and returned by post.**



**Scheme Rules**  
These are the rules governing The People's Pension Scheme.

You can access these documents under the 'Completed accounts' section from your home page.

Continue

**Need more info?**  
[Visit our resource library »>](#)  
This is where you will find information such as how/when to communicate with employees and how to use Online Services.

Signing up with The People's Pension

Simply Tailor sign up route 21

# What's next?

Help & support

Home

Sign-up help

Logout

## What you need to do next

100% complete

1

Email bank evidence and the Direct Debit Mandate

To comply with anti-money laundering regulations, we need evidence of the bank account that will be used to pay contributions. You can email a void cheque (marked as cancelled), paying-in slip or bank statement (from within the last three months) to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk)

As soon as the Direct Debit mandate has been signed you can also email that to [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk). This needs to be in place to pay for pension contributions. We'll confirm we've received and arranged to set up your Direct Debit within three working days (of receiving the mandate). If you've selected to pay the sign up charge by Direct Debit we'll take payment after 12 working days.

2

Log in to Online Services

Take a look around your **Online Services account**.

It's a good idea to familiarise yourself with all the features available as you'll need to use those regularly when managing your account with us. Please note that until we've completed 'Know Your Customer' and 'Source of Funds' checks, you won't be able to do the following within your account:

- Make a payment
- Submit employee data
- Manage employee data

We need you to enter further details so that your Online Services account complies with anti-money laundering regulations. You won't be able to 'Submit employee data' until you've done this.

3

Set up a payroll provider

If a payroll provider has not been set up now is the time. Having a payroll provider isn't essential but it may be handy if there are lots of employees.

To set one up you'll need some information from us, which you'll find in the 'documents' section.

4

Tell employees what's happening

The Pensions Regulator requires every employer to tell their staff certain information about the pension that's been set up. This should be done as soon as possible either before or just after your automatic enrolment duties start.

We provide you with some templates in our [resource library](#).

Back to documents

Finish

You can find generic templates to tell your employees what's happening in our resource library.

In the finance industry, we're required to find out information about the companies we're doing business with in order to comply with anti-money laundering regulations. This is known in the finance industry as 'know your customer' and includes finding out about the source of a company's funds.

During the final stage of set-up, we'll request evidence of the bank account details being used to pay pension contributions. The bank account name needs to match the name of the organisation that's signed up to The People's Pension. This could be a void cheque marked as cancelled, paying-in slip or a bank statement dated within the last 3 months. Please email this to us at [kyc@peoplespartnership.co.uk](mailto:kyc@peoplespartnership.co.uk). Though please note that this isn't a secure way to send documents. You can also post them to **The People's Pension, Manor Royal, Crawley, RH10 9QP**.

Once you've finished setting up the pension scheme, it's a good idea to arrange for the admin contact to login and familiarise themselves with the employer's Online Services account. They'll need to use this to submit employee details and make payments.

If you were unable to bind the scheme, this will need to be completed before the account is fully activated.