Information you need to set up Nest

This form is designed to help you collect all the information you need to set up Nest before you actually sit down to do it. Once you've filled out the form you'll be able to complete our online set-up process in a single sitting without having to find different pieces of information.

If you're an employer setting up your own account don't forget to sign up and **create your employer login** before you start setting up Nest. Fields marked by an asterisk (*) are mandatory.

Task 1 - Accepting our terms and conditions

Before the scheme is activated and members can be enrolled, the employer will have to agree to our **terms and conditions**. Any delegate organisation setting up Nest for an employer will need to get the employer to accept the terms and conditions. When you set up Nest we'll ask you if you want to accept them at the time or later. It's a good idea to decide before you start the set-up process.

Task 2 – Enter your business information

About your organisation

What's the legal name of your organisation?*

What is your PAYE reference?

How many workers are there in your organisation?*

- [ ] 1-4
- [ ] 5-49
- [ ] 50-249
- [ ] 250-499
- [ ] 500-999
- [ ] 1,000-4,999
- [ ] 5,000 and above

Please enter your duty start date*[1]

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[1] The date you enter must be the first day of the month your duties start.

Primary contact's details

The primary contact is the main contact for Nest. This is the person in your organisation that makes decisions about the scheme. They don't necessarily have to be the person dealing with the day to day administration of Nest and they can't be a third party. The details you give for them should be work contact details.

Title of primary contact*

☐ Mr   ☐ Mrs   ☐ Miss   ☐ Dr   ☐ Ms

First name(s) of primary contact*

Middle name(s) of primary contact

Last name(s) of primary*

Email address of primary contact*

Job title

Phone number*

Address line 1*

Address line 2

City/Town

County/State

Postcode/Zip code*

Country*

Additional information

How would you categorise your type of organisation?

Is your organisation a member of a trade association or membership body?

Where did you hear about Nest?

☐ Independent financial adviser (IFA)

☐ Employee benefits consultant (EBC)

☐ Professional contact

☐ Trade association or membership body

☐ An employer using Nest

☐ Personal contact

☐ Not applicable

☐ Other

☐ The Pensions Regulator

Task 3 – Your delegates

As an employer, you can allow other people access to your Nest account to help you set up and manage your ongoing administration. We call these people 'delegates'. There are two types of delegates in Nest. A 'delegate organisation' is a third-party business you've authorised to help set up or manage Nest for you and has set up their own Nest Connect account. An 'individual delegate' is a person either inside your organisation or outside who's not part of a delegate organisation. Here we've given you space to record the details for two individual delegates and one delegate organisation but you can record more separately if you want to. There's no limit to the number of delegates you can have. The details you give for them should be their work contact details. If you set up a full access delegate, either organisation or individual, they can complete the rest of the set-up process from here on if you'd like them to.

Individual delegate 1 - Name and work contact details

Title*

☐ Mr   ☐ Mrs   ☐ Miss   ☐ Dr   ☐ Ms

First name *

Last name*

Email address*

Relationship to the organisation*

☐ Employee benefits consultant   ☐ External accountant   ☐ External payroll provider   ☐ Finance

☐ Financial adviser   ☐ Organisation's HR   ☐ Payroll   ☐ Other

Job title

Address line 1*

Address line 2

City/Town

County/State

Postcode/Zip code*

Country*

Phone number*

Mobile number*

Individual delegate 1 – Delegate role and access permissions

Please select a role

- [ ] Full Access delegate
- [ ] Enrolment delegate
- [ ] General delegate
- [ ] Schedule delegate
- [ ] Payments delegate
- [ ] Read-only delegate

⚠ More information on the types of access can be found in our help centre article **What are the different levels of access I can give to a delegate?**

Individual delegate 2 – Name and work contact details

Title*

- [ ] Mr
- [ ] Mrs
- [ ] Miss
- [ ] Dr
- [ ] Ms

First name *

Last name*

Email address*

Relationship to the organisation*

- [ ] Employee benefits consultant
- [ ] External accountant
- [ ] External payroll provider
- [ ] Finance
- [ ] Financial adviser
- [ ] Organisation's HR
- [ ] Payroll
- [ ] Other

Job title

Address line 1*

Address line 2

City/Town

County/State

Postcode/Zip code*

Country*

Phone number*

Mobile number*

Individual delegate 2 – Delegate role and access permissions

Please select a role

☐ Full access delegate   ☐ Enrolment delegate   ☐ General delegate   ☐ Schedule delegate
☐ Payments delegate   ☐ Read-only delegate

More information on the types of access can be found in our help centre article **What are the different levels of access I can give to a delegate?**

Delegate organisation – Name and ID

If you're a delegate organisation setting up an employer you'll automatically be linked to the employer as part of the setup process. If you're an employer you'll need to ask the third party for the name of their delegate organisation and their Nest ID so you can find them on our system.

Name of organisation*

Delegate organisation ID*

Delegate organisation – Delegate role and access permissions

Please select a role

☐ Full access delegate   ☐ Enrolment delegate   ☐ General delegate   ☐ Schedule delegate
☐ Payments delegate   ☐ Read-only delegate

Task 4 – How you'll pay Nest

In this step, you'll confirm your payment source details. The payment source tells us which bank account you'll use to pay Nest. Using Direct Debit with Nest means you can control the timing and agree the amount of your payments before we collect the money. It's not the kind of Direct Debit that goes out of your account automatically on an agreed date.

Pensions contributions

Bank details – only if paying by Direct Debit

Account holder name*

Account number*

Sort code*

Roll number (some building societies assign account holders a roll number to identify their account)

What name would you like to give this payment source?*

Task 5 - When you'll pay us, what you'll pay us

Here you'll make important decisions about when and what you'll pay Nest. We'll then use this information to create worker groups. Groups are designed to save you time. Each worker you enrol into Nest will go into a group. This tells us what you'll pay and when, so you won't have to enter this information each time you enrol a worker. Here we've given you space to record the details for two groups but you can record more separately if you want to. There's no limit to the number of groups you can have but a lot of employers will only need one.

Once you've added your pay periods you'll need to tell us how much you'll pay in contributions for your workers. You'll need to add at least one set of contribution rates for each pay period you've set up.

Group 1

Your pay period

First you'll tell us when and how often you pay your workers their wages. We call this a 'pay period'. For example, you might pay your workers monthly or weekly.

How often do you pay your workers?*

☐ Monthly   ☐ Weekly   ☐ Fortnightly

☐ Four weekly   ☐ Tax weekly   ☐ Tax monthly

If you pay calendar monthly please tick here   ☐

If you pay monthly and it's not tax monthly or calendar monthly please tell us the day in the month the period starts from and ends on (e.g. 15th to the 14th of each month).

Start   End

If you pay weekly (other than tax weekly), fortnightly or four weekly please tell us the day of the week each period starts and ends on (e.g. Monday to Sunday etc).

Start   End

Please tell us the start date of the current pay period*

(NB we need this for whatever pay period option you have
selected other than for tax weekly and tax monthly)

When do you pay your workers in this period?*

When you'll pay us by?

For guidance on letting us know when you'll pay us see our help centre article **How do I select a payment due date?**

Your deadline for contribution payments will be:*

A fixed number of days after the pay period ends:
(This must be between 1 and 22 days after)

_____ days after

The same day of the month after the pay period ends:
(This must be between the 1st and the 22nd of the month)

_____ of the month

What contribution rate are the workers going to pay and what contribution rate will you pay for the workers in this Group?

Once you've added your pay periods you'll need to tell us how much you'll pay in contributions for your workers.
You'll need to add at least one set of contribution rates for each pay period you've set up.

What contribution rates will you use?*

☐   Pay the current minimum contribution rates.

☐   Choose your own contribution rates.

What part of your workers' pay will you use?*

☐ Qualifying earnings   ☐ Custom

If you're not using the current minimum contribution rates, what will your own contribution rates be?

Contribution rates	Your contribution	Worker's contribution*
From 6 April 2019	%	%

* Please enter the gross employee contribution. For example, if the total contribution including tax relief is
  5 per cent you should enter that figure.

Setting an upper contributions limit

If your payroll calculates contributions there's no need to set a maximum contribution rate in which case select no.

Would you like to set maximum contribution rates?

☐ Yes   ☐ No

Maximum contribution rates that you'll pay:

Maximum employer contribution: [＿＿＿＿] %   Maximum worker contribution: [＿＿＿＿] %

What do you want to call this group?

[＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿＿]

If you use other pay periods (e.g. different frequencies or different pay periods) and/or if you'll be paying different levels of contributions for some workers then you can set up additional group(s) to cover this.

Group 2

Your pay period

First you'll tell us when and how often you pay your workers their wages. We call this a 'pay period'. For example, you might pay your workers monthly or weekly.

How often do you pay your workers?*

☐ Monthly   ☐ Weekly   ☐ Fortnightly

☐ Four weekly   ☐ Tax weekly   ☐ Tax monthly

If you pay calendar monthly please tick here   ☐

If you pay monthly and it's not tax monthly or calendar monthly please tell us the day in the month the period starts from and ends on (e.g. 15th to the 14th of each month).

Start [＿＿＿＿＿＿]   End [＿＿＿＿＿＿]

If you pay weekly (other than tax weekly), fortnightly or four weekly please tell us the day of the week each period starts and ends on (e.g. Monday to Sunday etc).

Start [＿＿＿＿＿＿]   End [＿＿＿＿＿＿]

Please tell us the start date of the current pay period*

[＿＿＿＿＿＿＿＿＿＿＿＿＿＿]

(NB we need this for whatever pay period option you have selected other than for tax weekly and tax monthly)

When do you pay your workers in this period?*

[＿＿＿＿＿＿＿＿＿＿＿＿＿＿]

When you'll pay us by?

For guidance on letting us know when you'll pay us see our help centre article **How do I select a payment due date?**

Your deadline for contribution payments will be:*

A fixed number of days after the pay period ends:
(This must be between 1 and 22 days after)

[＿＿＿＿＿＿] days after

The same day of the month after the pay period ends:
(This must be between the 1st and the 22nd of the month)

[＿＿＿＿＿＿] of the month

What contribution rate are the workers going to pay and what contribution rate will you pay for the workers in this Group?

Once you've added your pay periods you'll need to tell us how much you'll pay in contributions for your workers. You'll need to add at least one set of contribution rates for each pay period you've set up.

What contribution rates will you use?*

☐ Pay the current minimum contribution rates.

☐   Choose your own contribution rates.

What part of your workers' pay will you use?*

☐ Qualifying earnings   ☐ Custom

If you're not using the current minimum contribution rates, what will your own contribution rates be?

Contribution rates	Your contribution	Worker's contribution*
From 6 April 2019	%	%

* Please enter the gross employee contribution. For example, if the total contribution including tax relief is
  5 per cent you should enter that figure.

Setting an upper contributions limit

If your payroll calculates contributions there's no need to set a maximum contribution rate in which case select no.

Would you like to set maximum contribution rates?

☐ Yes   ☐ No

Maximum contribution rates that you'll pay:

Maximum employer contribution: [   ] %   Maximum worker contribution: [   ] %

What do you want to call this group?

[   ]

All done?

Once you've filled out this form you're ready to **set up Nest**.