

Module Factsheet: Auto Enrolment



Cascade's Auto Enrolment module makes the complex and labour-intensive process of Auto Enrolment simple and straightforward for HR administrators and employees alike.

The solution provides clarity in terms of what HR and payroll professionals are expected to do, and when. It also allows each department to retain control over their own tasks, whilst at the same time ensuring that complete legislative compliance is achieved.

In addition to this, the module has been designed to assist employers with efficient analysis, communication and enrolment of individuals.

The Auto Enrolment module will continually monitor and assess employees to determine their Auto Enrolment status as either an Entitled Worker, an Eligible Jobholder or a Non-Eligible Jobholder.

Key Benefits

- **Automatic identification of employees**

The module automatically identifies employees for auto-enrolment based on certain eligibility criteria. This eligibility will be continuously monitored and assessed, and Cascade's intelligent software triggers will pinpoint when new starters or current employees need to be automatically enrolled.

- **Automatic and efficient communication**

The system will inform eligible job holders that they have been automatically enrolled, using Cascade's mail-merge facility.

- **Eye-catching timeline feature**

The module stores historical opt-in and opt-out records via an easy to use, visual timeline feature.

- **Pension deductions**

It will automatically deduct pension contribution rates (via Cascade's payroll module).

- **Continuous assessment**

It continually identifies eligible job holders who are not enrolled onto a qualifying pension scheme.

- **Detailed analysis**

The module provides detailed or summarised reports outlining the organisation's Auto Enrolment status.

- **Stress-free**

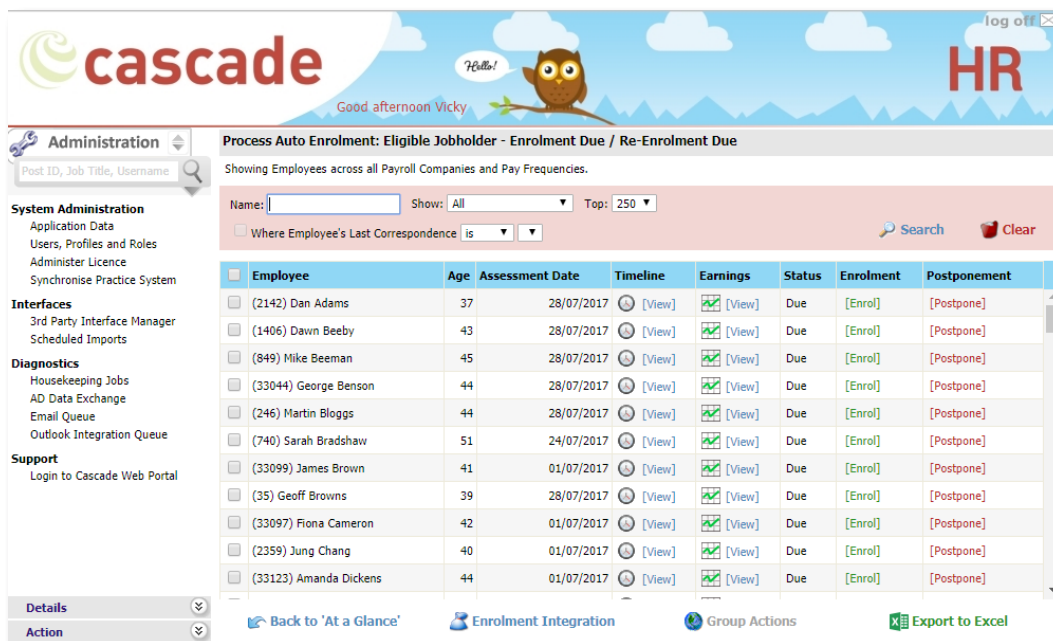
The Auto Enrolment module streamlines the whole process from start to finish.

Take a Closer Look...

Assessing Eligibility

Each Pay Reference Period, 'Qualifying Earnings' information from Cascade Payroll is used to assess employees, based on their level of earnings and age information.

If you do not use Cascade Payroll, an export from a 3rd party system can be imported to provide earnings information.



Employee	Age	Assessment Date	Timeline	Earnings	Status	Enrolment	Postponement
(2142) Dan Adams	37	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(1406) Dawn Beeby	43	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(849) Mike Beeman	45	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(33044) George Benson	44	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(246) Martin Bloggs	44	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(740) Sarah Bradshaw	51	24/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(33099) James Brown	41	01/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(35) Geoff Browns	39	28/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(33097) Fiona Cameron	42	01/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(2359) Jung Chang	40	01/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]
(33123) Amanda Dickens	44	01/07/2017	[View]	[View]	Due	[Enrol]	[Postpone]

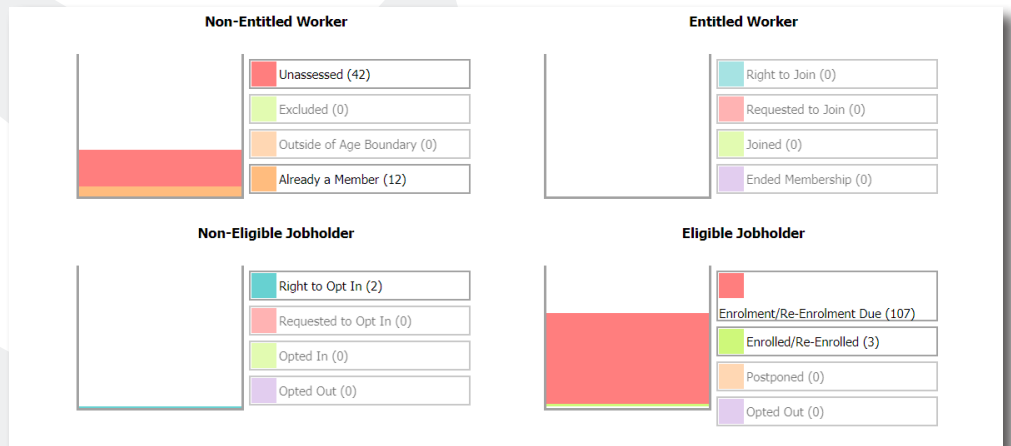


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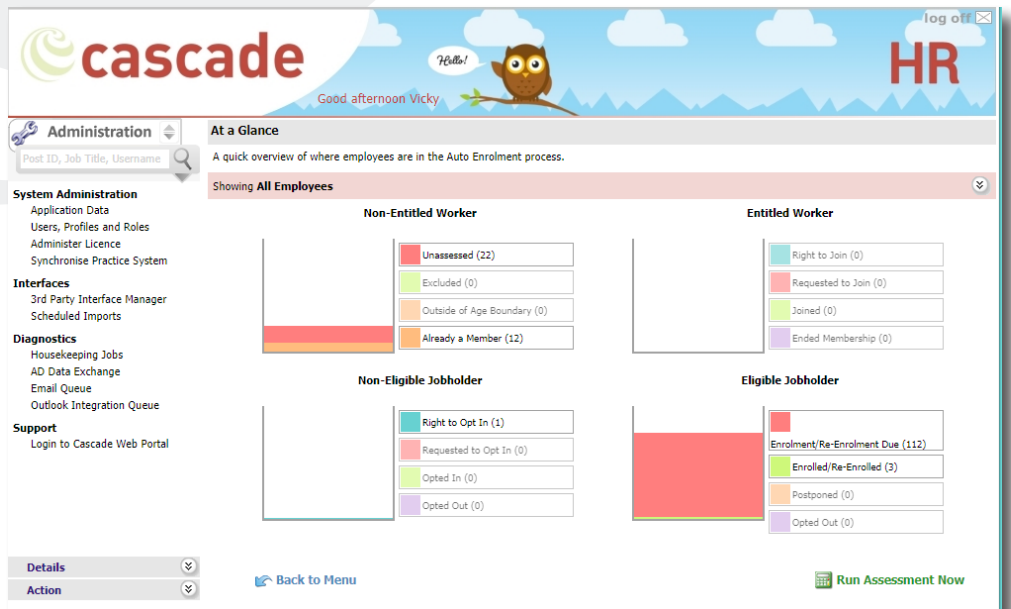
Employee Categories

Once employees are assessed, the 'At a Glance' screen provides a graphic illustration of which category your employees fall into in regards to their Auto Enrolment status.



Using the 'At a Glance' Screen

Clicking on the categories takes you to the intelligent process screen, where group actions are used to process the appropriate Auto Enrolment action e.g. 'Postponement,' 'Enrolment,' 'Opt in,' 'Join scheme' etc.



The screenshot shows the 'At a Glance' screen for 'All Employees'. It features a navigation menu on the left with categories like Administration, Interfaces, Diagnostics, and Support. The main content area displays the same employee category breakdown charts as shown in the previous figure, but with updated counts: Non-Entitled Worker (Unassessed: 22, Already a Member: 12), Entitled Worker (Right to Join: 0, Requested to Join: 0, Joined: 0, Ended Membership: 0), Non-Eligible Jobholder (Right to Opt In: 1, Requested to Opt In: 0, Opted In: 0, Opted Out: 0), and Eligible Jobholder (Enrolment/Re-Enrolment Due: 112, Enrolled/Re-Enrolled: 3, Postponed: 0, Opted Out: 0). A 'Run Assessment Now' button is visible at the bottom right.

Timeline Feature

The eye-catching timeline feature allows an employee to view all events and communications relating to their Auto Enrolment status.

