Payroll and Pensions Checklist

Payroll and Pensions Checklist

Please find below a list of the documents that EPM require.

|  |  |  |  |
| --- | --- | --- | --- |
| Task | Guidance  | Date Required by: | Completed |
| Complete school transfer spreadsheet | If you are coming for us for payroll services and haven’t already completed this, please complete the spreadsheet and send to your payroll contact  | ASAP |[ ]
| Complete the new PAYE reference request start up spreadsheet |  | By date of transfer  |[ ]
| Confirmation of pension information | Please provide a list of employees who are non-eligible for auto-enrolment and need to be monitored by EPM on a monthly basis | By date of transfer |[ ]
| Request the following from existing payroll providers: | Copy payslips | By date of transfer  |[ ]
|  | P45’s (only required if new HMRC reference number being issued on transfer to EPM) | By date of transfer |[ ]
|  | Details of existing overpayments and recovery agreements | By date of transfer |[ ]
|  | Age Exception certificates | By date of transfer |[ ]
|  | Court Orders | By date of transfer |[ ]
|  | Third party deductions (Unison, GMB, salary sacrifice)These must all be received by the date that the contract commences with EPM | By date of transfer |[ ]
| Details of payment schedules for employees who are on maternity and sick leave. |  | By date of transfer  |[ ]

**Please send me all information listed above as soon as possible so that we can ensure the set-up is fully complete in advance of the commencement of the contract with EPM.**

If you have any questions in regards to completing these documents or providing the information, please do not hesitate to get in touch with your payroll contact who will be happy to assist you.