



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 asterix(*) 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 \(PDF\)](#). 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.

- Accept our terms and conditions when you set up NEST
- Accept our terms and conditions later

Task 2 - 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 staging date*

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?

Who recommended NEST to you?

- | | | | |
|--|---|---|---|
| <input type="checkbox"/> Independent financial adviser (IFA) | <input type="checkbox"/> Employee benefits consultant (EBC) | <input type="checkbox"/> Professional contact | <input type="checkbox"/> Trade association or membership body |
| <input type="checkbox"/> An employer using NEST | <input type="checkbox"/> Personal contact | <input type="checkbox"/> Not applicable | <input type="checkbox"/> Other |

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 give us details on the way you intend to pay your contributions. We call this is a 'Payment source'. We recommend using Direct Debit as it's the easiest way to pay contributions to us. 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. You can set up multiple payment sources to pay different groups of workers if you need to. It's best though to have as few payment sources as possible as each additional one creates extra administration for you. Here we've given you space to record the details for one payment source but you can record more separately if you want to.

Pensions contributions and fees

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?*

 You could also use alternative methods such as debit card or direct credit. For more information on different payment methods see our help centre articles on [Choosing a payment source](#).

Refunds

Sometimes we might need to refund money to you, for example if you accidentally pay too much or one of your workers opts out of NEST.

Which bank account would you like us to send any refunds to?

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, to cover each calendar month, or weekly, from Monday to Sunday. Before you complete this section you might want to get help from someone who has a good understanding of payroll timelines, such as your payroll provider.

How often do you pay your workers?*

- Monthly
 Weekly
 Fortnightly
 Four weekly
- Tax weekly
 Tax monthly
 A different time frame

When does this period start and end?*Start End **When did your current period start?***

For example, if you pay your workers weekly it could be Monday to Sunday. Or if you pay your workers calendar monthly and align the dates to tax periods it would be the 6th of the month to the 5th of the following month.

When do you pay your workers in this period?***Setting a deadline for contribution payments**

For guidance on setting a payment deadline see our help centre article [How do I set a deadline for contribution payments?](#)

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**How much are you going to contribute for people in this pay period?**

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. Before you complete this section you might want to get help from someone, such as your finance team.

What contribution rates will you use?*

For guidance on setting a payment deadline see our help centre article [What payment deadline should I set?](#)

- Pay the current minimum contribution rates that increase automatically as the legal minimums go up.
- Pay the 2018 minimum contribution rates straight away so there'll be no increase. These are higher than the current minimum contribution rates.
- Choose your own contribution rates.

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

For more information on certification see our help centre article [What is certification?](#)

- Qualifying earnings
- Custom
- Certification - set/tier 1
- Certification - set/tier 2
- Certification - set/tier 3

If you're not using one of the pre-set contribution rates, what will your own contribution rates be?

The worker contribution rates you enter in should include any tax relief the workers may be due. For example, if the total contribution including tax relief is 1 per cent you should enter 1 per cent here. When you come to make your contributions you'll need to pay 0.80 per cent.

Contribution rates	Your contribution	Worker's contribution*
Before 1 October 2017	%	%
From 1 October 2017	%	%
From 1 October 2018	%	%

Setting an upper contributions limit

Would you like the flexibility to pay more on behalf of your workers? This will give you more choice over the worker and employer contributions you pay to NEST.

Would you like to set maximum contribution rates?


Yes No

Maximum contribution rates that you'll pay:

Maximum employer contribution: % Maximum worker contribution: %

For example if you normally pay a 1 per cent worker contribution, but you want to allow them to increase this to 2 per cent, you should enter 2 per cent in the maximum worker contribution box.

What do you want to call this group?

 If you have different contribution rates for workers in the same pay period you can set up another group.

Group 2

Your pay period

How often do you pay your workers?*

Monthly Weekly Fortnightly Four weekly
 Tax weekly Tax monthly A different time frame

When does this period start and end?*

Start End

When did your current period start?*

For example, if you pay your workers weekly it could be Monday to Sunday. Or if you pay your workers calendar monthly and align the dates to tax periods it would be the 6th of the month to the 5th of the following month.

When do you pay your workers in this period?*

Setting a deadline for contribution payments

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- Custom
- Certification - set/tier 1
- Certification - set/tier 2
- Certification - set/tier 3

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Yes No

Maximum contribution rates that you'll pay:

Maximum employer contribution: % Maximum work contribution: %

For example if you normally pay a 1 per cent worker contribution, but you want to allow them to increase this to 2 per cent. You should enter 2 per cent in the Maximum worker contribution box.

What do you want to call this group?

All done?

Once you've filled out this form you're ready to [set up NEST](#).