AE Automatic Enrolment Overview

Pension and Automatic Enrolment (AE) · https://paiyroll.com/kb/ae-automatic-enrolment-overview/

Please follow this guide to understand how to *automated* automatic enrolment works.

New starter Automation

paiyroll® has been designed to automate all the steps for automatic enrolment. This means that after a scheme is setup, when you add a new starter with an AE Pay Item referencing the scheme, no additional AE Pay Item values or manual steps are required.

There are 2 modes for AE Auto-enrolment:

Automatic	**Manual**
The usual approach for *no-touch* starters	Only for import, or for correcting a prior incorrect AE status
When neither a **Migrated Status** or **Date(s)** are provided, Workers will be enrolled according to the scheme settings.	The automated importers generate the **Migrated Status** and **Date(s)**; there is no automation, as the status is forced (completed beforehand). The only exception is where a Migrated Status of **Deferred** is set, which will trigger automation on the deferral date.
Letters will be generated and sent	**No** letters are sent (except for Deferral)
New Enrolments appear in member files	**No** enrolments are generated (except for Deferral)

In day-to-day use, leave the **Migrated** AE input fields blank so the software operates automatically after the Pension scheme settings have been configured.

In both cases:

- Deductions can be percentages or absolute values.
- The relevant contributions appear in the contribution file

Migrated Status

Exceptionally, if you need to force a particular migrated status, then follow the table below. This will occasionally occur on import if the migration status was not determined correctly, or in other situations, for example, TUPE, where you need to continue the existing AE status:

AE Pay Item input	Worker was Enrolled	Worker was Opted-out	Worker was Opted-in	Worker in Deferral	Worker Not Enrolled after deferral
Migrated Status	Auto-enrolled	Opted-out	Opted-in	Deferred	Not Enrolled
Migrated Date	Date auto-enrolled	Date auto-enrolled	Date opted-in	Date of deferral	Date of deferral
Opt-out date		Date opted-out			
Opt-in date			Date opted-in		