3c

April 2020

Detailed guidance for employers

Appendix C: Assessing a worker

This document accompanies:

Detailed guidance no. 3c – Having completed the assessment

If you decide to print it out it's best viewed at A3 size, so you'll need to ensure that the A3 paper tray is selected on your printer. If your printer doesn't have an A3 tray, the document **will** print on A4 but you may find the text size too small to read comfortably.

automatic enrolment

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Appendix C – Assessing a worker

(Opt in or joining)

A flowchart showing the next steps following the first assessment of a worker aged between 16 and 74 where the first assessment is because the worker has asked to become a member of a pension scheme during a postponement period.

If the first assessment date for the worker is the deferral date see **Appendix B**.

For the other first assessment dates see **Appendix A**.

* This amount is for the 2019-2020 tax year. These figures are reviewed annually by the Department for Work and Pensions (DWP). Where there is a change, the figures for the next tax year after they have been announced by the DWP, as well as the historic and current amounts can be found on our website at: **www.tpr.gov.uk/earnings-thresholds**

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Appendix C: Assessing a worker (opt in or joining)

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