

**WPD EMPLOYER REGISTRATION DATA CAPTURE FORM – For Employer Use**

Use this form to collect the information required to enquire about WPD services or alternatively if you have everything you need and fees have been agreed, you can enter the information online at [www.workplacepensionsdirect.co.uk/employer](http://www.workplacepensionsdirect.co.uk/employer)

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| --- | --- |
| **Full Company Name:** |  |
| **Full Company Address and Postcode :** |  |
| **Best Point Of Contact and Status In Company:**  (e.g. are we dealing with Director / Payroll Administrator) : |  |
| **Employer Contact Email Address:** |  |
| **Best Contact Number and Best Time To Call** (e.g. AM/PM or ANYTIME): |  |
| **PAYE Reference No. (if known) :**  (Looks like **123/AB12345** and can be found on most letters from the Pensions Regulator, WPD can acquire this if you only have the staging date): |  |
| **Letter Code (if known):**  **OR Accounts Office Reference Number:**  (Looks like **1234567890** and can be found on most letters from the Pensions Regulator): |  |
| **Number of Workers Employed:** |  |
| **IF NEW BUSINESS:**  **Date First Eligible Worker Employed:** |  |
| **Who Deals With Payroll?:**  (if outsourced): accountants name and contact point, e-mail address, phone number)**:** |  |
| **What Fee Has Been Agreed?:**  If in doubt call 0113 457 4574 or e-mail [support@wpd.email](mailto:support@wpd.email). |  |
| **Any special notes / requirements:**  (e.g. has client already chosen postponement, selected pension scheme etc.) |  |

**FOR OFFICE USE ONLY :**

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| --- | --- |
| **Name of Individual That Completed Online Registration of New Client :**  (if introducer – state their name): |  |
| **Date of New Registration :** |  |
| **Has PAYE Reference Number been verified on Salesforce:** | **YES / NO** |
| **Do We Have The Letter Code:**  (if introducer has sold the case, this can be chased as part of post sales process) : | **YES / NO** |
| **If case passed their staging date, have the relevant adjustments been made to Salesforce?** (see Onboarding process) : | **YES / NO / N/A** |
| **Has “Signatory” field been changed to point of contact at the company?:** | **YES / NO** |
| **If case is more than 5 months passed staging date, has it been added to the Wallboard – “Urgent Cases”:**  (if fees have been discounted due to partner agreement or “on the cusp”) : | **YES / NO / N/A** |
| **Are agreed fees showing as correct on the Opportunities tab:**  (if fees have been discounted due to partner agreement or “on the cusp”) : | **YES / NO** |
| **Is introducer referral percentages showing correctly on Opportunities tab:** | **YES / NO** |
| **Any special notes added to Salesforce :** | **YES / NO / N/A** |