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Change to the Opt out process

The opt out process will be changing from 4 February. From this date, the effective date of the opt out will be based on when you receive a notification that an online opt out application requires your input, or the date from when you receive the paper-based application form from an employee. This is a change from being based upon the date the completed opt out is received by us.

If you receive an online notification or paper opt out application form within the first three months of the date of contractual enrolment, automatic enrolment or automatic re-enrolment, the opt out will be effective from the date of the contractual enrolment, automatic enrolment or automatic re-enrolment. You can arrange for future pension contributions from payroll to be stopped and arrange for a refund via payroll of any contributions already deducted as a result of this recent enrolment or re-enrolment.

- For example, Mr White started in a new post on 1 January 2019, and is contractually enrolled. He completes an online application to opt out on 31 March 2019, and a notification that an item requires your attention is issued to you. As 31 March is a Sunday, you don't look at and complete your section of Mr White's application until the following day, 1 April 2019. But as the online application / notification to you was made within three months of Mr White's contractual enrolment, the effective date of the opt out is 1 January 2019. You can arrange for future deductions from payroll to cease with effect from 1 April and for the deductions from January, February and March to be refunded via the usual payroll process.

If you receive an online notification or paper opt out application form more than three months after contractual enrolment, automatic enrolment or automatic re-enrolment, the opt out will be effective from the first day of the month after the month you received the notification / paper opt out application form. You can arrange for future pension contributions from payroll to be stopped in accordance with this effective date.

- For example, Mrs White was automatically re-enrolled on 1 December 2018. You receive Mrs White's paper-based opt out application form on 1 March 2019 (although she signed it on 28 February). As this is more than three months after Mrs White's automatic re-enrolment date, the effective date of the opt out will be the first day of the month after the month you received it; in this case 1 April 2019. You must arrange for pension contributions from payroll to cease with effect from 1 April.

We'll still issue a confirmation of the effective date, both to yourselves and to the member, but it'll be **based on when you receive the notification** of an online election or paper opt out application form, **not when a completed application is received by us**. This should mean that you've sufficient time to process opt outs before the appropriate payroll change cut-off date.

We'll also be communicating this change to members of the Scheme, as well as updating the application forms (online and paper) as well as other Scheme literature.

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