SARGENT-DISC CORPORATE START UP FORM
PAYROLL, CREWSTART™ & PENSION AUTO ENROLMENT

Please complete the compulsory documentation denoted below in order to set up your production with Sargent-Disc Payroll, CrewStart™ and Auto Enrolment.

* denotes **mandatory** fields

CREWSTART PRIVACY POLICY

As part the CrewStart setup your project will display the default privacy policy detailed in Appendix 1.

I **do** wish to make use of the default CrewStart™ privacy policy/retention period ☐

Please note: if you do not tick this box you will need to supply your privacy notice along with the completed forms below

DOCUMENT CHECKLIST

DOCUMENT		COMPULSORY	NOTES
Start Up Form	**Section 1 & 2**	✓	Company & Account Information
	Section 3	✓	CrewStart™ Setup
	Section 4	✓	Pension Auto-Enrolment
	Section 5	✓	Authorised Signatories
	Appendix 1		For your reference
SD Online User Request Form		✓	One per Production, per company, per person. To be signed by user **and** authorised account signatory
SD Production Card			For your reference - please request set up paperwork if required
Payroll Charges			For your reference
SD Barclays Bank details			For your reference
Anti-Money Laundering & HMRC Details Form		✓	Compulsory if the company has not processed payroll via SD before
Apprentice Levy Registration		✓	

**For support with completing any of the above documentation
please contact marketing@sargent-disc.com or +44 (0)1753 630300.
Office hours: 09.30 – 18.00, Mon-Fri (UK)**

Sargent-Disc is committed to service excellence

CrewStart™   Payroll   Purchase Order   Auto Enrolment   Production Card   Production Services   Production Accounting   Training & Academia

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SECTION 1: COMPANY INFORMATION

Company Name*			
Company Registered Address*			
Company Registered Number*		**VAT No.**	
Payroll Contact Name*			
Telephone Number*		**Email***	
PAYE Reference*		**Tax Collector's Ref***	

Payroll Frequency *	Weekly ☐	Fortnightly ☐	Four-Weekly ☐	Monthly ☐

SECTION 2: ACCOUNT INFORMATION

Salaries Control	
PAYE Control	
NI Control	
Holiday Credit Control	
VAT Control	
Employer's NI Cost	
Currency	

SECTION 3: CREWSTART START UP

Project Title* This will be the project name displayed on CrewStart	
Project Administrator* Person responsible for setup of the project and assigning of security roles	
Job Title*	
Department*	
Mobile Number* SMS message with registration code will be sent to Project Admin	
Email address* This will be linked to your CrewStart project and can be either a business or personal email	
Do you want to use SD standard start forms?*	Y / N
Do you want to use CrewStart for sending contracts?*	Y / N
Do you want to use CrewStart for Timesheets?*	Y / N

IMPORTANT: Once your CrewStart information has been received, our dedicated CrewStart team (CrewStart@sargent-disc.com) will reach out to the Project Admin with further details and requirements.

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SECTION 4: PENSION AUTO ENROLMENT START UP

All employers with UK workers have to automatically enrol their eligible staff in a qualifying pension scheme. They also have a legal duty to send statutory pension notices within 6 weeks of an employee's start date. Sargent-Disc's Standard Solution is to set up an Auto Enrolment scheme with NEST (National Employment Saving Trust, set up by the government specifically for Auto Enrolment), apply 3 months postponement (and subsequent postponement) whenever possible and calculate minimum statutory contributions based on qualifying earnings. Other pension scheme providers, postponement rules and pensionable earnings basis can also be used, but an additional administration charge might apply.

If Auto Enrolment does not apply to any of your employees please select at least one of these reasons:

☐ All the employees are not considered workers
☐ All the employees are mainly working outside the UK
☐ Other (please specify) _____

If Auto Enrolment applies to your employees please complete the following:

☐ Use Sargent-Disc's standard Auto Enrolment set up with NEST
☐ Use different pension provider (please specify) _____

NEST (or other Pension Scheme) Contact: will be an employer delegate with NEST and/or sent any pension related queries*

Title (Mr/Mrs/Ms..)*	
Full Name*	
Address* (if different from registered address)	
Email*	**Telephone***

Invoice Contact (if different from NEST Contact): recipient of the invoices for any Auto Enrolment charges

Full Name	
Telephone	**Telephone**

Statutory Notices Contact (if different from NEST Contact): will be the employer contact on the notices sent to the employees

Full Name	
Address	
Email	**Telephone**

Declaration of Compliance to The Pensions Regulator: to be submitted within 5 months of your 1st employee start date - additional forms will be sent to the NEST Contact for signature

Will you use the Equity Pension Scheme as a qualifying pension scheme (instead of NEST) for some of your employees?*	Y/N
Do you want Sargent-Disc to complete your Declaration of Compliance with The Pensions Regulator?* NOTE: Service only available if all employees are paid through Sargent-Disc	Y/N

Additional Pension Information: Specific postponement rules, contributions rates, etc:

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SECTION 5: AUTHORISED SIGNATORIES

In order to ensure the security of your data, please detail your authorised account signatories below and indicate the areas they have authority over.

Please use the **existing** authorised studio signatories list ☐ Specify _____

Company Name*	

Authorised Signatory

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Signatory for*	Payroll ☐ CrewStart ☐ Auto Enrolment ☐		

Authorised Signatory

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Signatory for*	Payroll ☐ CrewStart ☐ Auto Enrolment ☐		

Authorised Signatory

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Signatory for*	Payroll ☐ CrewStart ☐ Auto Enrolment ☐		

Authorised Signatory

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Signatory for*	Payroll ☐ CrewStart ☐ Auto Enrolment ☐		

Authorised Signatory

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Signatory for*	Payroll ☐ CrewStart ☐ Auto Enrolment ☐		

IMPORTANT: Authorisation must be by an officer/director of the company or an authorised signatory. Any changes to the signatories above <u>will need to be authorised by the individual below</u>*

Name*		Signature*	
Job Title*			
Mobile/Cell*			
Email*			
Date*			

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APPENDIX 1: PRIVACY NOTICE (SARGENT-DISC STANDARD TEMPLATE)

We at {Company Name} are committed to protecting your privacy and information. This policy explains what personal information we collect from you, how we use it, the conditions under which we may share the data with a third party and how long we retain the information.

If you have any questions regarding this policy and our privacy practices they should be addressed to: {Enter Company Name's Infosec details here} as an example …infosec@sargent-disc.com or in writing to The Chief Information Security Officer, Sargent-Disc Ltd, 5-7 Baring Road, Beaconsfield, BUCKS, HP9 2NB

Who is {Company Name}?

How do we collect information about you?
The information you supply will be collected via the CrewStart online onboarding application.

What information do we hold?
The information that is collected is detailed below.

Data	Purpose for Collecting	Retention Period
Name	To fulfil contractual obligations	Seven years from the end of production
Date of Birth		
Gender		
Physical Address		
Job Title		
Department		
Passport No.		
Passport Expiry Date		
Country of Residence		
Country of Citizenship		
Employment Status		
Phone Number	Contact details and invitation to join CrewStart application	
Email Address		
Next of Kin	Contractual Information	
Next of Kin Relationship		
Next of Kin Tel. No.		
Car Registration		
Car Make/Model		
Bank Details	Required for payments to bank account	
Salary/Compensation	To determine total remuneration	
NI Number / SSN	Identification for HMRC processing	
Schedule D Number	Identification for accounts and reporting	
VAT Number		
Time & Attendance	For calculation of remuneration	Seven years from the end of production
Student / Postgraduate Loan information		
Employment / Pension Status		
Tax Code		
Proof of Eligibility to Work		
IP Address	Recorded as part of the electronic signature	
Account Username/Password	Security access to the system	Until Consent withdrawal
Cookie IDs	To identify the user during their logged in session	Logged in session

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Why is this necessary?
The information is required to enable you to contract with {Company Name}.

What happens to my data?
Your data is stored within the CrewStart application within the UK. As CrewStart is a globally accessible piece of software your information is available from anywhere in the world. We will strive to keep your data secure to the best of our abilities whilst adhering to GDPR standards.

How long do we keep this data?
Your contractual information is kept for the periods as detailed in the 'What information do we hold' table. Certain information is subject to retention periods that are governed by statutory requirements. Where these are longer than the retention period shown in the table above, the statutory period will be adhered to.
As your CrewStart user grants you access to multiple employments / productions certain information will be retained whilst your user account is active.

This user information is detailed below:
- Title
- Name
- Email Address
- Mobile Telephone Number

Can I ask for my data to be removed?
Yes, you can request removal of your personal data from {Company Name} and this removal will be carried out within 28 days. Only information that is legally required for statutory purposes will be retained and this will be removed at the end of the statutory period.

What are my rights?
Your rights are as those as detailed in the General Data Protection Regulations (GDPR). These state that you:
- Have the right to request copies of any personal information held on our systems.
- Have the right to request removal of said personal information where it is legally allowable.
- Have the right to request the cessation of processing of your data.

Any requests for removal / copies of data will be dealt with within one month of the date of request.

Is this information used for any other purpose / shared with a third party?
{Company Name} also shares the collected data with {Parent Company} for the purpose of facilitating future employment. The information collected as detailed in the 'What information do we hold' section is shared with Sargent-Disc Ltd for the purpose of processing payroll .

Data Submitted to Third Party Payroll Application:

Data	Purpose for Collecting	Retention Period
Name	Identification for payroll processing	Seven years (statutory requirement)
Date of Birth	Determine tax/pay eligibility	
Gender	Required by HMRC for pension and other benefits	
Physical Address	Contact details provide to HMRC	
Salary/Compensation	Required to determine remuneration	
NI Number	Identification for HMRC	
VAT Number	Identification for accounts and reporting	
Schedule D Number		

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Data	Purpose for Collecting	Retention Period
Country of Citizenship	Required to determine tax status	
Country of Residence	Required to determine tax status	Seven years (statutory requirement)
Passport No.		
Passport Expiry Date		
Employment Status		
Job Title/Department	Required for reporting	
Phone Number	Contact details	
Next of Kin Name		
Next of Kin Telephone		
Next of Kin Relationship		
Vehicle Details		
Email Address	Contact details and invitation to join Payslips/Payroll applications.	
Bank Details	Required for payments to bank account	
Student / Postgraduate Loan Information	Required by HMRC	
Tax Code / Coding Information	Required for Correct tax coding	
Eligibility to work information	Required by HMRC	

Sargent-Disc also has a legal obligation to share some of this data with the pension provider as chosen by {Production Name}. This information is listed below.

Data Submitted to Third Party Pension Providers:

Data	Purpose for Collecting	Retention Period
Name	Legitimate Interest: Information required by the Pension Provider under Auto Enrolment regulations	Seven years (statutory requirement)
Date of Birth		
Gender		
Physical Address		
Salary/Compensation		
NI Number		
Phone Number		
Email Address		
Employee ID		
Start date		
Leaving Date		

Your right to complain
Should you wish to lodge a complaint about how your data collected or used by any of the parties listed above you can contact the Information Commissioners Office. Their details can be found at ico.org.uk along with the procedures for making a complaint.