Detailed guidance for employers

Appendix B: Assessing a worker at the deferral date

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.
Appendix B – Assessing a worker at the deferral date

An flowchart showing the next steps following the first assessment of a worker aged between 16 and 74 where the assessment date is the deferral date (if postponement used at the staging date or first day of employment).

If the first assessment is because the worker has asked to join the scheme during a postponement period see Appendix C.

For the other first assessment dates see Appendix A.