Guidelines on registered administrator renewal process

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1. Introduction

Trustees of every scheme and trust RAC must appoint a registered administrator to carry out certain duties on their behalf. These duties are known as 'core administration functions. The 'core administration functions' are the preparation of annual reports and annual benefit statements for the trustees and the maintenance of sufficient and accurate records of members and their entitlements to discharge the above functions. In addition, registered administrators must submit scheme information to the Pensions Authority (the Authority) on an annual basis.

RAs must renew their registration annually with the Authority not later than 30 days before the anniversary of their initial registration or most recent renewal.
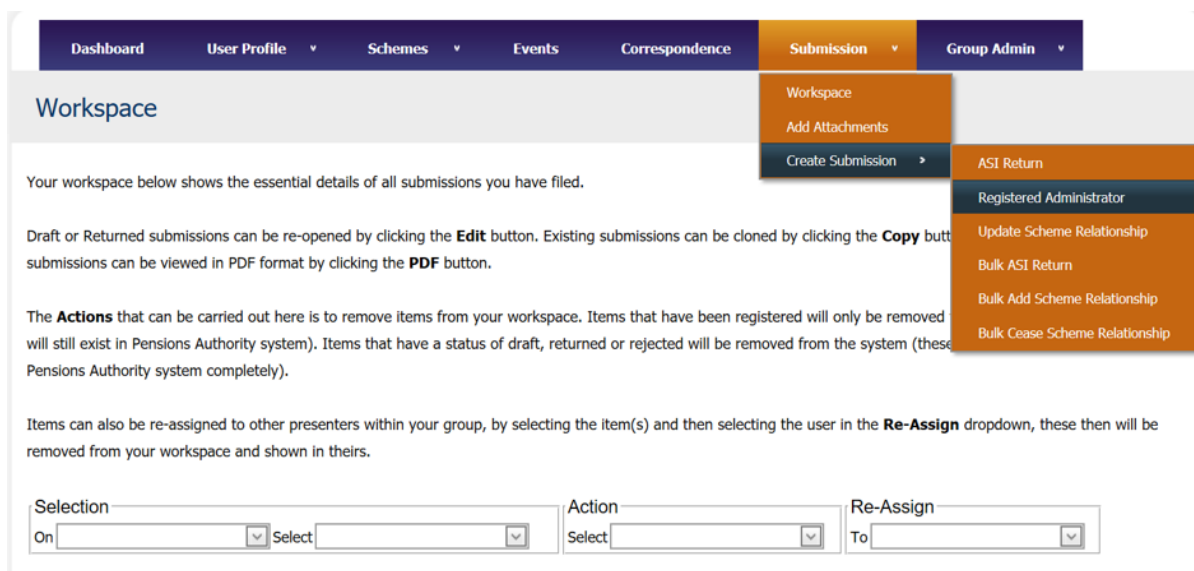
Applications for renewal of registration for RAs must be made online through the Authority's Pensions Data Register (PDR). Guidelines for submitting a renewal application are set out below.

2. Submitting a renewal application

Go to https://pdr.pensionsauthority.ie and login using your RA email and password.

Read the Terms and Conditions of the portal. Click **Agree.** You will be brought to your Dashboard. The Dashboard contains a summary of your activity as an RA on PDR.

To create a renewal application, hover your mouse over **Submission/Create Submission** and select **Registered Administrator**.

2.1 Start Page

You will then be brought to the **Start Page** which contains a User Guide. Read this guide, then scroll to the bottom of the page and click **Next**.

2.2 Registered Admin. (RA)

On the Registered Admin. (RA) page, enter your RA number and hit the return button. This will automatically populate the RA name and RA Renewal Date. Click **Next.**

2.3 RA Main Details Page

On the RA Main Details page, enter the Registered Administrator name, address for notices and legal proceedings, Authorising Officer, and any other relevant information/addresses.
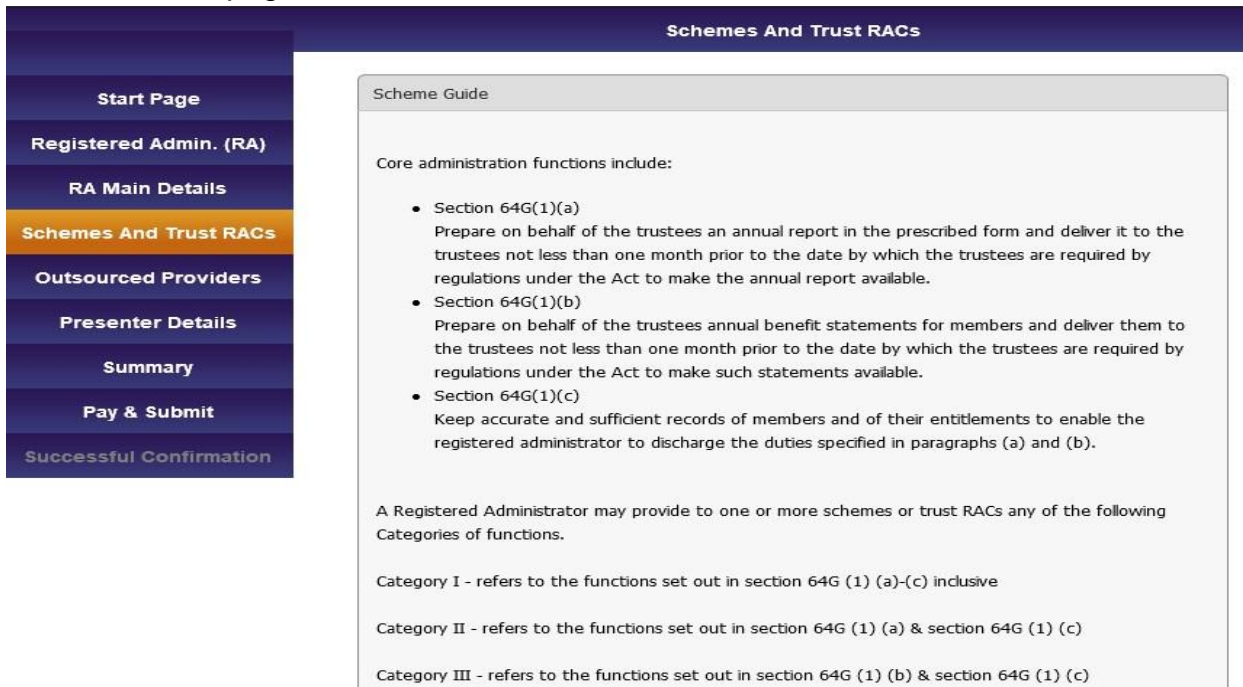
If entering data in the Other Addresses or Trustee(s) fields, remember to click **Add** after entering each address/trustee.

Note: Clicking the **Save** button at the bottom of your screen allows you to save inputted data and move between screens without losing your work. You can also partially complete the form, logout and return to finish your application at another time. Your saved draft will be available to edit at your Dashboard under Submission/Workspace.

When you have finished entering all RA details, scroll to the bottom of the page and click **Next**.

2.4   Schemes and Trust RACs Page

You are now on the Schemes and Trust RACs page. Read the information on the Scheme Guide page.

Scroll down the page to start adding details of the individual schemes for which you provide core administration functions. Make sure to click **Add** after entering the details of each scheme.

Alternatively, if many schemes/trust RACs are to be entered, these can be uploaded electronically using a csv format. For this option, tick the box '**Click here if you wish to upload the contents of a csv file'.**

The **RA Renewal Bulk Scheme CSV Template** can be downloaded from the 'Help' section of the customer portal. File specifications can be found in Appendix I below.

Once you have finished entering your scheme details, uploaded a csv file click **Next**.

2.5   Outsourced Providers

If you indicated that you have, or intend to enter an outsourcing arrangement, you will now need to provide the name and details of the Outsourced Provider.

If the Outsourced Provider is a body Corporate, you must provide their Registered Office details. Make sure to click **Add** when you finish entering the Outsourced Provider's details.

2.6   Presenter Details

You are now on the Presenter Details page. Enter a reference for your submission. Remember to keep a record of your reference.

Click **Next.**

2.7   Summary

You can now view a summary of your application.

Review the summary carefully and if you are happy with the content, tick the box to confirm that the particulars furnished in the form are correct and that you request that the details provided be entered in the register. Click **Next**.

2.8 Pay and Submit

You will then be brought to a **Pay and Submit** page. Please ignore this page as there are no fees associated with a RA renewal submission.

Click **Finish.**

2.9 Successful confirmation

If your submission is successful, you will receive a submission reference number. Keep a record of this unique reference number. View and print the generated pdf form. Once your application has been submitted online, you must print, sign, and send a copy of the pdf form by email to rarenewal@pensionsauthority.ie or, by post to; Supervision and Enforcement, The Pensions Authority, Verschoyle House, 28-30 Lower Mount Street,

Dublin 2, D02 KX27. Your renewal of registration cannot be completed until a signed copy of the generated pdf is received by the Authority.

Form Validation

Please Note. You are required to print, sign and send a copy of the electronic form to the Pensions Authority. Once the submission has been successfully submitted please print out a copy of the generated pdf.

Ok

3. Queries

If you have any questions about accessing PDR or any RA related issues, please email rarenewal@pensionsauthority.ie allowing sufficient time to complete your renewal application. Please note that a request for assistance does not extend the deadline for submission.

Further guidance on the RA renewal process along with FAQs for RAs is available on the Authority's here.

Appendix I

A 'RA Renewal Bulk Scheme CSV Template' file is available from the Help section of the PDR Portal. Below is a description of each of the fields from this CSV file.

Column Letter	Field name	Type	Description
A	Record Number*	Integer	A unique incrementing number for the record – used for error/warning feedback information
B	PB No*	Integer	The number of the scheme, e.g. 123456. Must be numeric only, no alphas or PB
C	Scheme Name*	String	The name of the scheme in alpha numeric and characters
D	Scheme Type*	String	The value can be either DB, DC or RAC
E	Scheme Year End*	String	Must be in the format DD/MM (if opening in excel make sure column is in Text format)
F	Functions*	String	The value can be either I, II or III.
G	Outsourcing*	String	Enter Y or N
H	Multiple RAs*	String	Enter Y or N