File requirements guide

Most payroll providers can give you an employee data file. If you're creating your own, use this guide to make sure your file contains all the information we need.

When you're uploading an employee data file we offer 3 different upload options:

1) Upload and submit a full file

 A full file contains all your employee details, autoenrolment statuses and contribution amounts.

2) Add a file for assessment only

– You provide us with a file containing your employee data. This can include the auto-enrolment (AE) date and contributions. You will be given a choice to use your data or our assessment data. We'll work this out for you and will provide you with a fully-assessed file at the end. Please note, we don't need to assess your maintenance file.

3) Upload a file for assessment and submit

– You provide us with a file containing your employee details. You won't need to include auto-enrolment (AE) dates, statuses or contribution amounts. We'll work this out for you and make suggestions (which you can accept or reject). You can download a fully-assessed copy of your file for your records and submit this straight to us. Please note, we don't need to assess your maintenance file.



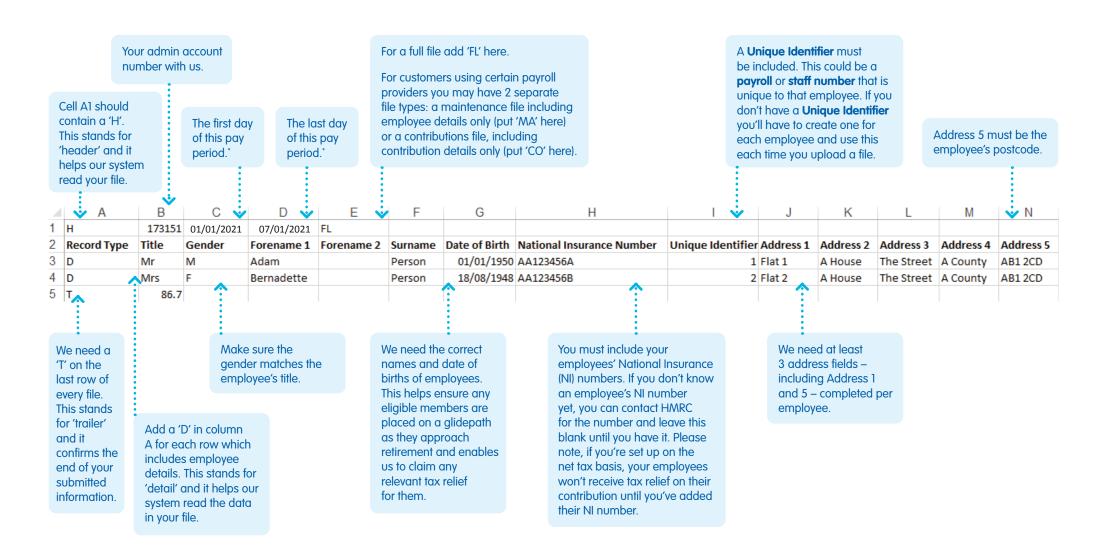


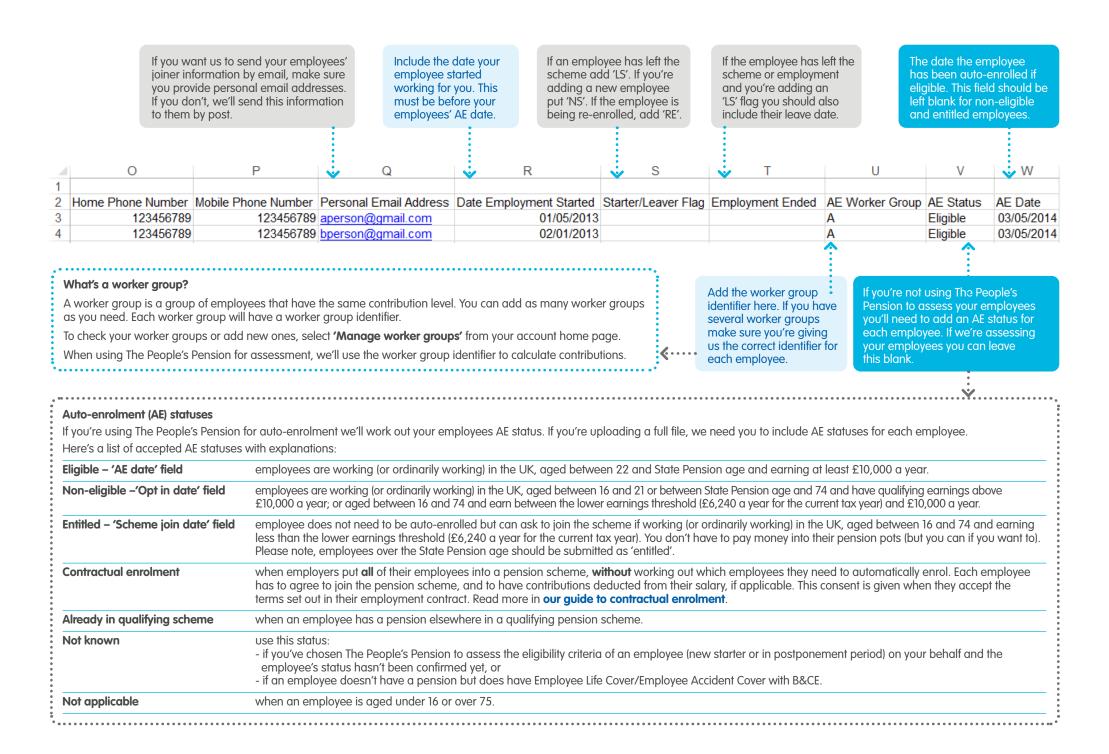
This guide will show you what you need to include for each upload option.

Must-haves

Good to have

Different if The People's Pension is assessing your employees Don't forget – all the dates in your file must be in the same format.





If your employee's AE Add a date if a non-Total employee contribution If the employee is also signed Usually we send joiner Total employer status is 'Entitled' or eligible employee or an contribution amount. You amount. You should put a up to our Employee Life or information to your 'Contractual enrolment', employee who previously should put a '0.00' here if '0.00' here if you're using The Employee Accident Cover, employees so you don't please include the date opted out of the scheme you're using The People's People's Pension to assess include the premium amount need to add a date. they asked to join the wants to ioin. Your Pension to assess your vour employees. Please here. The premium amount Only add a date here scheme. Your employee employee will have a note, this should match the can be found within your employees. if you're sending will have a 'Scheme join 'Scheme join date', an 'Opt deducted amount in your worker group settings in your joiner information to in date' or an 'AE date'. date', an 'Opt in date' or employee's payslip. Online Services account. employees. an 'AE date'. Z 🐝 Scheme Join Date Opt Out Date Opt In Date Total Earnings Per PRP Pensionable Earnings Per PRP Employer Pension Contribution Employee Pension Contribution Missing/Partial Pension Code EAC/ELC Premium Date AE Information Received Deferral Date 600.00 18.00 16.50 22.00 0.00 550.00 550.00 Add your employee's You would not normally need Add your employee's Missing/Partial Pension Code must be provided where pension contributions If you're using to add an 'Opt out date'. total earnings (before earnings for this pay are not as expected (but only if one of the following scenarios occurs). postponement tax and National period on which add the date '1' - Employee has left the company. Where this is provided but no leaving If your employee has opted Insurance is deducted) pension contributions postponement date is added, the employee will be treated as leaving on the last day of out and isn't signed up to for this pay period. are calculated. will end. the pay period our Employee Life Cover or Employee Accident Cover, '2' - Employee is temporarily absent you'll need to remove them '3' - Employee is on family leave from the file. If they have Employee Life Cover or '4' – Employee has chosen to cease contributions **Employee Accident Cover with** '5' – No pension-related earnings for the employee (or earnings below the us, you must keep them on threshold) file, but add their opt-out date. '8' – Employee has transferred to this account (from a different account) What is 'opt out'? What are pensionable earnings? What is postponement? If an employee is eligible for auto-An employee's pensionable earnings are the elements of their pay that are enrolment but doesn't want to join used to work out pension contributions. It should include basic pay as a It's possible to delay the scheme they still need to be minimum. You would've set this up when you set up your worker group. There enrolling employees into auto-enrolled. We'll contact them are 4 main definitions: Qualifying earnings, Set 1: pensionable earnings, Set 2: the scheme. For more pensionable earnings and Set 3: total pay. When using our assessment tool, information on this visit with joiner information which includes details about how they can opt out we calculate contributions based on the definition you've selected. For more help and support. of the scheme. information on this visit help and support.