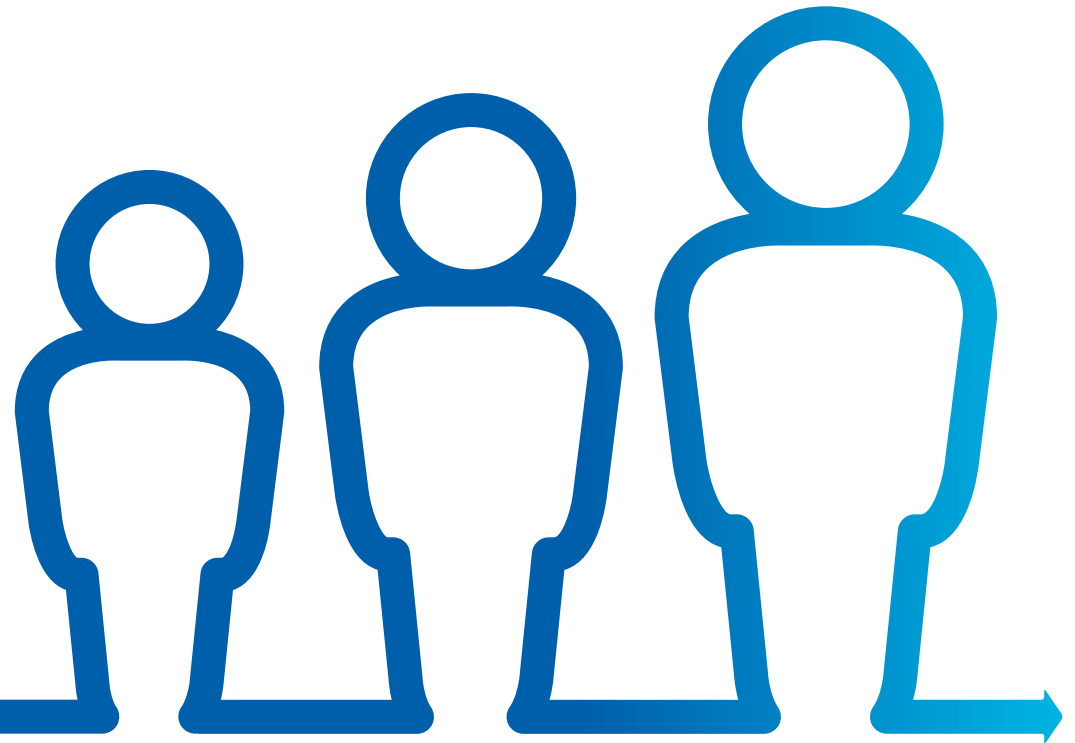


Uploading your employee data file

Employer Online Services guide

This guide is designed to help you upload an employee data file in your Online Services account. Some payroll providers will create an employee data file for you, although you can easily create this yourself.



Contents

	Manage account	
	Home	3
	Submitting your employee data	4
	Getting started	
	Submitting your employee data	5
	Your settings	6
	File upload	
	Submitting your employee data	9
	Initial error report	10
	Matching the columns in your file	11
	File validation	12
	Not your first file upload?	14
	Starters and leavers	15
	If we assess your file	16
	Final summary	18
	Manage payments	
	Make a payment	19

Home

Manage account

the people's pension

Home

Help & support

Accounts

Filter your accounts by action required: All accounts

Employer	Staging/duties start date	No. of accounts	
Help Guide	01/11/2019	1	Show accounts
Help Guide	01/10/2019	1	Show accounts !
Help Support	01/10/2019	1	Show accounts
Help Support	01/10/2019	1	Show accounts

Page 1 of 1

Show all

After you've signed up with The People's Pension, you'll be able to log in to your Online Services account. Once you've signed in you'll reach the home screen. Here you'll see all the accounts you have access to.



Choose the account you'd like to add employee data to by selecting 'Show accounts' and then clicking on the cog that appears beside the admin account name. If you have access to lots of accounts, use the search box at the top of your screen to find the one you need quickly.



If you see an exclamation mark beside the select button, this means you have an 'Action required' on the account you see this against.

Just the one account with us?

Your home screen will look a little different. You'll be able to click 'Submit employee data' from the on-screen options.

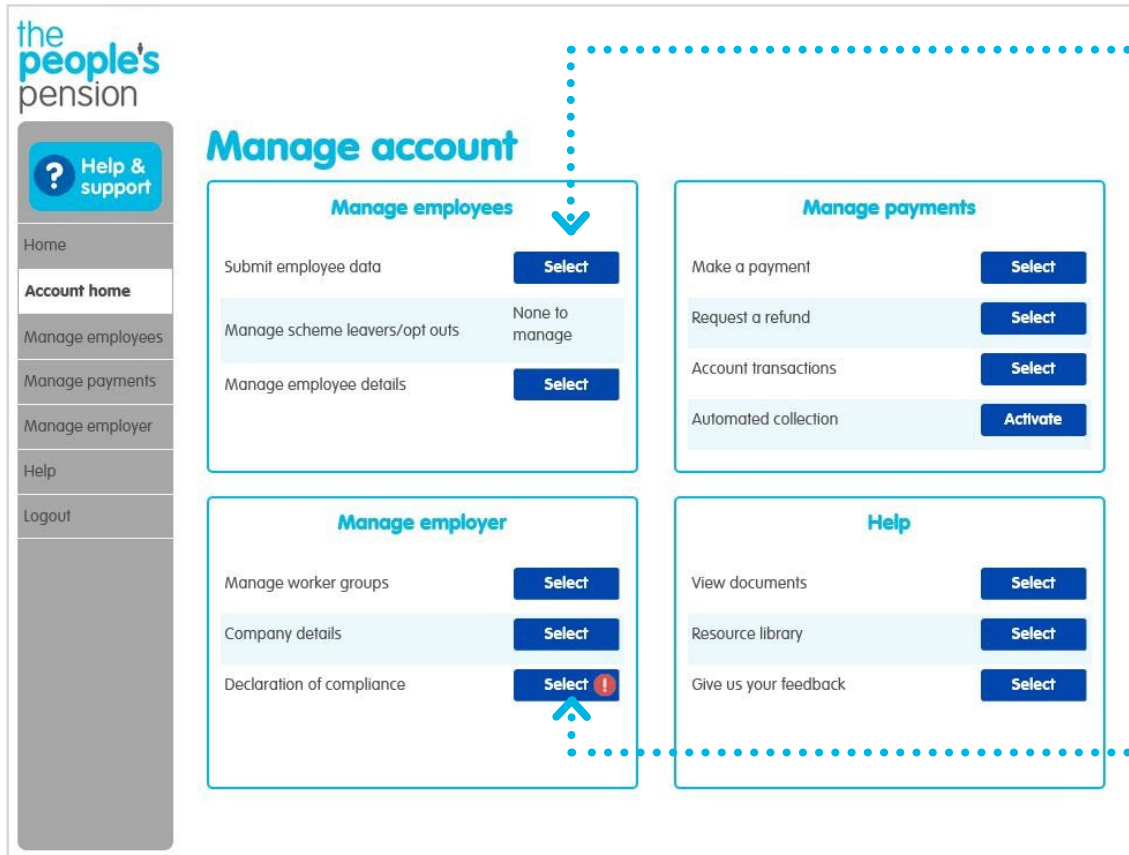
Account

123516 - Userguide.com Monthly

Open account	Select
Submit employee data	Select !
Make a payment	Select !
Manage scheme leavers/opt outs	Select
View documents	Select

Submitting your employee data

Manage account



You'll reach the 'Manage account' screen for the admin account you selected. In the 'Manage employees' section select 'Submit employee data'.

You'll be able to view our quick guide and choose your account settings if this is the first time you've submitted your employee data.

You'll need to complete your declaration of compliance when:

- your duties start date has passed
- you've submitted your first employee data.

You'll need to complete this with The Pensions Regulator to show you're meeting your duties as an employer. Don't forget, you'll need to complete your declaration of compliance again at your re-enrolment date every 3 years.

Submitting your employee data

Getting started

Getting started - submitting your employee data

Back to my account

Intro Setup Useful Info Ready

Familiar with our system?

You can turn off our getting started pages for this account now that you are familiar with the procedure. You can turn them back on again from the guides & settings tab.

Getting started pages Turn off

Making sense of it all

Hello Luke, the first thing to know about submitting your employee data is that it isn't scary! The following few pages will introduce you to the process so you are fully prepared.

Step 1

Choose your settings and preferences



Skip the tour

From here, we'll take you through a quick guide to submitting your employee data – you can turn this off after you've submitted your employee data for the first time or if you've changed the upload process by clicking here.

It's useful take the tour to find out more about using your account, but you can skip this if you want.

You'll also see the account settings page after completing the tour.

Your settings

Getting started

Getting started - submitting your employee data [Back to my account](#)

Intro **Setup** Useful info Ready

Choose your options

There are a number of ways to customise the way you submit your data to us. And you can change these at any time using the guides & settings tab.

1. How do you want to submit your employee data?

I want to submit a file [What's this?](#)

- Ideal if your payroll software creates a file for you
- Ideal if you have lots of employees or just a few
- Ideal if you plan to use postponement (to delay putting employees into the pension scheme)

Select

I want to enter my details manually

- Ideal if you have just a few employees
- Ideal if you don't have payroll software

Selected

Confirm choice

2. If you're sending your data to us through file upload, would you like to be alerted if your contribution levels change?

☒ You would like to be alerted at +/- 25% [Edit](#)

3. Understand your tax basis?

☒ Acknowledged by x x, x has confirmed tax setting as net. [Show](#)

4. Terms and conditions

☒ You have accepted [Show](#)

Continue

There are several different ways to give us your employee data:

- you can arrange with your payroll provider to send us your employee data directly (not all providers can offer this service):
- you can upload a file yourself
- you can manually enter your employee data. We'll remember what you've selected for next time, but you can change this at any time by going to the 'Account settings' tab.

You can ask us to alert you if your contributions have changed from the previous time you sent us your employee data through any submission.

To make sure we handle your contributions correctly, we'll ask you to confirm your tax basis. To learn more on this visit [our website](#).

The 'Terms and conditions' should be read before making the first submission. This should be confirmed as read by the individual submitting the data only and not on behalf of someone else.

Clicking on 'Continue' will take you to the next step where you can send us your data file if you've reached your staging/duties start date. Please note the continue button will only appear once all the steps have been completed.

Your settings

Getting started

Getting started - submitting your employee data[Back to my account](#)

Intro

Setup

Useful info

Ready

Helping you along the way

We've created a handy guides & settings tab for you, which will follow you through the site. Familiarise yourself with the info below. You can find this anytime when you're submitting a file to us by clicking this icon (it'll be at the top of your screen).

Guides & settings

Your account info

Here are some of your basic account details. You can edit or add worker groups by clicking 'Manage worker groups' from your account homepage.

Account number

Worker group IDs

EPSR number

Tax basis

Employer contribution: 3%, Employee contribution: 4%

For help understanding your tax basis – click on: [Helping you with tax relief.](#)

You can access your account information at any time. You'll need this for when you complete your declaration of compliance and when you set up your payroll software, if you're using one.

If you need to change some of the settings you selected on the previous screen, you can do this from the 'Account settings' tab.

Your account info & help guides

Account settings

Your account info

Account number

Worker group IDs

EPSR number

Tax basis

Employer contribution: 3%, Employee contribution: 4%

For help understanding your tax basis – click on: [Helping you with tax relief.](#)

Guides and templates

[File upload guide](#)

[Full file template](#)

[Manually enter data guide](#)

[Error guide](#)

[Employer Online Services guide](#)

Your account info & help guides

Account settings

Settings

Submitting your data

Contribution change alerts

File upload

Manual entry

On

Off

+/-

25

%

Submitting your employee data

File upload

the people's pension

test@test.com
GARC 2 06 42451, 52, 53 8:54 - 371750

Guides & settings

Submit your data - file upload

Exit file upload

Upload file Error check Starters & leavers Review & submit Make a payment Complete

Let's get going.

Your employee data file's ready, so let's begin adding your employee details to our system. Simply follow the steps below, and remember help's at hand in our 'guides and settings' tab.

1 - Check the dates on your file

Your pay frequency is set to **weekly**

We're expecting your pay period to be:
10/07/2020 - 16/07/2020

Good to know:
These dates follow on from your last file.

More help

Assessed as Entitled or Non Eligible

Before you get started, make sure any employees you're enrolling with a Non Eligible or Entitled auto-enrolment status have sent you a written opt-in/joining notice asking you to enrol them in the pension scheme. Visit our website for more information.

2 - Choose file

Now choose your file to upload:

Browse for file

We only accept the following files:

- ☒ .xls
- ☒ .xlsx
- ☒ .csv

Need to know:
If you're using a payroll provider the software they use may be able to create a file for you.
You can also create the file yourself. Download one of our handy templates to use as a starting point.
You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

This example shows a full file (FL). If you're using maintenance (MA) and contribution (CO) files you'll have the option to select which file you'd like to upload. A maintenance file holds employees' personal details and should only be used with new starters, scheme leavers or if a member has changed their personal information. These don't need to be submitted every pay period. A contribution file holds employees' pay period salary and contributions. This needs to be uploaded every pay period.

To upload your file click 'Browse for file' and then select your file from your computer.

You can download our template from [our website](#), if you're not using payroll software to output your file. We're compatible with most payroll providers, but occasionally you'll need to edit your file to match our requirements.

2 - Choose file

☒ You are uploading Full File Version 1.csv [Change file](#)

Tell us about your file

Does this file contain column headings? ☒ Yes ☐ No

Please select the date format being used in your file

Good to know:
All the dates in your file must be written in the same way.

Confirm

We'll check the way your file is laid out here. If your file has column headings they'll look something like this:

H		01/12/2019	30/12/2019	FL
Record Type	Title	Gender	Forename 1	Forename 2

Submitting your employee data

File upload

3 - Choose upload method

Has your file already been assessed, with automatic enrolment statuses and contribution amounts added?

Yes, my file's complete – please upload.

☐ **Just upload**

No, please assess my file and suggest automatic enrolment statuses and contributions for my employees – then upload my file to your system.

☐ **Assess & upload**

No, please assess my file and suggest automatic enrolment statuses and contributions for my employees – but don't upload my file to your system just yet.

☐ **Assess only**

Next, we'll ask you to choose an upload method. If you've not already worked out your employee's pension contributions, we'll do it for you here. You can do this by selecting 'Assess and upload' or 'Assess only'. If you're uploading a maintenance file this doesn't need to be assessed. If you're using payroll software to work out your contributions, you should select 'Just upload'.

Once you've chosen your upload method, you'll be able to submit your data for assessment by clicking 'Upload file'.

Or if you prefer, you'll be able to choose to run in training mode at this point. Go for this option if it's the first time you're uploading your file, or you just want to practice before actually submitting your data to us.

Submit my data

You're ready to start submitting data to us. We recommend a little practice in training mode first but there's still plenty of help along the way.

Full File Version 2.csv

Upload file

Run in training mode

Training mode is great if you're new to this and fancy a little practice. You can check out the whole process without actually sending us any data. And you can do it as many times as you like, you'll be an expert in no time!

Full File Version 2.csv

Upload file in training mode

Submitted employee data history

Previous submissions will be stored here. You can download these to keep track of the information you have provided us with. [Hide history](#)

Upload date: 12 Dec 2019	Pay period start date: 01 Nov 2019	Pay period end date: 30 Nov 2019
Uploaded file name: Full File Version 1.csv		
Employee contributions: £61.66	Employer contributions: £37.00	Download processed file

You'll be able to view and download your previous submissions here. Or you can view them by going to 'Account home' and then 'Account transactions'. These can be downloaded in excel format.

Initial error report

File upload

There's a problem with your file

[Switch to manual entry](#)

But don't worry - it's easily fixed.
We've had a quick look at your file and there are details that don't match what we were expecting. We've added more info about this below.

 **Account number is incorrect**

The account number on your file doesn't match this account with The People's Pension. This is always in the top right hand corner of Online Services once you've logged into the account.

 **File start and end dates are different to your account settings**

[More help](#)

Your pay frequency is set to **monthly**
We're expecting your pay period to be:
01/12/2019 - 31/12/2019

Submit your corrected file - what next?

1. Open your payroll software or data file.
2. Check through the errors we've highlighted.
3. Correct the errors and save your file again. (If you're making corrections using your payroll software you may need to generate a new file.)
4. Then click the button below. We'll return you to the start so you can submit your corrected file.

[Upload my corrected file](#)

Want to try something different?

You can change the way you submit your data to us. Instead of uploading a file, you can add the data manually directly into our system.

[Switch to manual entry](#)

Our system will carry out some initial checks on your file to make sure it can read the information you've provided. It will also check that none of the mandatory details we need are missing.

If you don't receive any errors, you'll be able to move straight to matching the columns in your file – there's more about this on the next page.

This screen shows some example error messages, this is just a guide and not a full list of those you might receive.

You may need to contact us in order to correct some of these. Our [troubleshooting error guide](#) will help you.

If you've only got a few employees or aren't already using payroll software, you might find our manual entry method more convenient. You can switch to this at any time. This can also be changed in the 'Account settings' at the top of the screen.

You should open up your own file and move through the errors, correcting or updating each one as you go.

You'll need to open your file and make any changes needed. When you're ready, click 'Upload my corrected file' to re-submit. Our system will perform the same validation checks again.

Matching the columns in your file

File upload

Column matching 5

Here are the columns we've struggled to match. Let us know which column we can find the information in by selecting the matching column.

[Column matching help](#)

Our field	Select your field
Date of Birth	-- select your field --
National Insurance Number	-- select your field --
Personal Email Address	-- select your field --
Mobile Phone Number <i>Optional</i>	-- select your field --
Starter/Leaver Flag <i>Optional</i>	-- select your field --

Matched columns 25

These are the fields we've successfully matched.

[Reset mappings](#)

Our field	Your field
Title	Title
Gender	Gender
Forename 1	Forename 1
Surname	Surname

[View all](#)

[Cancel](#) [Continue](#)

Do you want to see this page again?

Now all your columns are matched. You won't usually need to see this page again – unless you change your column headings. We'll hide this for you, unless you select 'Every time', then you'll see this each time you upload a file.

[Show column matching](#) [Every time](#) [When needed](#)

When you upload a file our system tries to figure out what information you've got in each column. This allows our system to read your file and enter the correct information about your employees into our system.

It's best to use the column headings we suggest in our file requirements – then you won't need to map your file at all.

Once you've uploaded your file, we'll try to match the columns to our requirements. This means that we'll identify the employee data in each column and ensure your headings reflect ours.

If any mandatory details are missed, we'll highlight these to you in a separate box. This will need to be corrected before you can continue.

After you've finished matching your field, you'll be able to preview your file. If the matched columns are incorrect you can click 'Reset mappings' and start again.

Once all the columns have been matched, click 'Continue'.

Our system's reading the information you've uploaded

Sometimes we'll need your help matching the columns on your file to what we're expecting. If you have 'Unmatched columns' you may need to change this. (If you can't, please click 'Continue').

You'll need to map your file the first time you use this service, we'll save your settings. So as long as you use the same file format next time you upload a file, you won't need to map it again.

File Validation

File upload

We've found 2 error(s)

Follow the steps below to fix the errors, then you can resubmit your file.

1 - Review the errors

We've found errors with the following employee(s)

[Download error guide](#)

Error no	Employee	Row	Data with error	Hints
1	Adam Sample	3		Incorrect gender for the title
2	Adam Sample	3		Incorrect title for the gender

Download your error report

Good to know:

You can download a copy of your file with any errors highlighted.

[Error report - xls](#)

[Print the errors - pdf](#)

2 - Fix the errors

Let's begin fixing those errors. We think it's easiest if you open up your payroll software or your own data file, then work through the list, correcting them one-by-one.

If you need help along the way, take a look at our error guide where we explain what might be the problem. If you get really stuck, contact us at support@peoplespartnership.co.uk

[Download error guide](#)

Want to try something different?

You can change the way you submit your data to us. Instead of uploading a file, you can add the data manually directly into our system.

You can change the way you do this by clicking the Open settings button below, which will open up the Guides & settings tab in the right place for you.

[Open setting](#)

3 - Submit your corrected file - what next?

1. Open your payroll software or data file.
2. Check through the errors we've highlighted.
3. Correct the errors and save your file again. (If you're making corrections using your payroll software you may need to generate a new file.)
4. Then click the button below. We'll return you to the start so you can submit your corrected file.

[Upload my corrected file](#)

Each time you upload a file we'll check the data you've supplied. If we find any errors or inconsistencies within the file you'll receive an error report.

This screen shows some example error messages, this is just a guide and not a full list of those you might receive.

You may need to contact us to correct some of these. Our [troubleshooting error guide](#) will help you.

If you've only got a few employees, or aren't already using a payroll software, you might find our manual entry method more convenient. You can switch to this at any time from the 'Account settings' tab.

Click download error guide as either a pdf or excel report, (depending on your own computer settings you might need to click 'Enable editing' so that you can see the error comments).

You'll need to open your file and make any changes needed. When you're ready, click 'Upload my corrected file' to re-submit. Our system will perform the same validation checks again.

File Validation

File upload

	A	B	C	D	E	F	G
1	ERROR REPORT						
2	1. Locate your error(s) - highlighted in red.						
3	2. Hover your mouse over the error.						
4	3. Open your own file and amend the incorrect information.						
5	4. Save and close your amended file.						
6	5. Upload your amended file.						
7	Source Row	RecordType	Title	Gender	Forename 1	Forename 2	Surname
8	3		Mr	F	Ac		Sample
9							
10							
11							
12							
13							
14							

If you download your report in excel we'll highlight any issues in red. Hover your cursor over these for an explanation. You'll need to click 'Enable editing' before the error message will appear.

Check out our [troubleshooting error guide](#) for a full list of errors and explanations.

You should open up your own file and move through the errors, correcting or updating each one as you go.

If you're making changes to your employee details, don't forget to update your own systems and payroll software (if you use any).

Not your first file upload?

File upload

Time to check your scheme leavers

We've compared your file to the information you gave us last time. We've found members that were on your last file but aren't on this one.

Potential scheme leavers

What's this?

Unique ID	NI Number	Forename	Surname	Actions
2		Michelle	Sample	☐ Set all as scheme leavers ☐ Set all as ignore this time ☐ Scheme leaver ☐ Ignore this time
3		Sandra	Sample	☐ Scheme leaver ☐ Ignore this time

Cancel

Continue

Employees missing from your file

If an employee is not on this file but was on your last file, we'll ask you to check and confirm why they're missing. It could be that they've left your business or the scheme, or because they've no contributions for this pay period. Please confirm why they're missing by selecting either 'Scheme leaver' or 'Ignore this time'.

Starters and leavers

File upload

the people's pension

Guides & settings

Submit your data - file upload

Exit file upload

Upload file

Error check

Starters & leavers

Review & submit

Make a payment

Complete

Time to check your new starters

We've compared your file to the information you gave us last time and have found members that might be new.

You have new members on your file with possible matches that require action [What's this?](#)

Unique ID	NI Number	Forename	Surname	Action
5439			Smith	☐ Select all matched ☐ Match - Smith, 01/11/1990 ☐ New scheme member ☐ Remove

Cancel

Continue

B&CE website

[Terms of use](#) | [Legal](#) | [Contact us](#)

Are these existing members?

We'll check your file and compare it to your previous submission to see if any of your employees have changed their details. If you've changed one of your employee's unique identifiers, you might see this screen. We need you to check if these are:

- An existing member
Select 'Match employee'. We'll add any contributions for this person to the existing matched member.
- A new employee
Select 'New scheme member'. We'll add this person as a new member. They'll receive new joiner information.
- Added in error
Select 'Remove'. We'll ignore this person on your file and won't create a new membership record for them.

If we assess your file

File upload

Review and download

We have now assessed your file based on our understanding of current auto-enrolment legislation. The data from the assessment summary can be uploaded into your payroll system, copied into your file or you can confirm the amendments using the next steps.

We will confirm if the information you have provided matches our expectations or if it does not. If it does not you will either need to correct the information on your file or you can make these corrections using the next steps.

We have also validated the personal details supplied within your file. If there were any issues with the information supplied, we will remove the data and you will need to update this under Action's Required once your file has been submitted.

3 employees assessed

Assessment summary	Meets expectations	Doesn't meet expectations
Auto enrolment status	2	1
Employer contributions	3	0
Employee contributions	3	0

You can now download your assessment summary and continue uploading your file

[Download CSV assessment summary](#)[Download Excel assessment summary](#)[Cancel](#)[Continue](#)

If you've asked us to assess your file we'll show you an assessment summary. We break this down into 'Meets expectations' or 'Doesn't meet expectations' based on the auto-enrolment statuses and contributions. If your employee joins or leaves the scheme part way through a pay period, you may want to work out their pro-rata contributions – our assessment tool can't do this for you.

We'll suggest the employee's auto-enrolment status. Scroll across your assessment summary to see suggested auto-enrolment date and contribution amounts for each employee.

If you selected 'Assess my file only' click 'Finish'. You could use our assessment suggestions to update your payroll and produce a full file (with auto-enrolment statuses and contribution amounts added) ready to upload to us.

If you're uploading your file to our system now (you selected 'Assess and upload my file') review our suggestions and click 'Continue'.

Click to download an assessment summary. Use the red and green indicators to identify employees where we've suggested a change in contributions. The suggestions we make are based on the minimum contribution amounts set by your worker group.

If we assess your file

File upload

Submit your data - file upload

Exit file upload

Upload file

Error check

Starters & leavers

Review & submit

Make a payment

Complete

Automatic enrolment statuses

Here are our suggested statuses for your employees. We've worked this out based on the age and salary you've given us. Have a look through and accept or ignore our suggestions for each employee.

What's this?

☐ Keep all supplied statuses ☐ Accept all suggested statuses

	Unique ID: 1	Name: Adam Sample	Date of birth: 01/01/1950
Total earnings:	£1000.00	☐ Keep the supplied status of Eligible	
Pensionable earnings:	£1000.00	☒ Accept the suggested status of Non Eligible	

Download CSV assessment summary

Download Excel assessment summary

Cancel

Continue

We'll give you the option to accept our suggestion of auto-enrolment status for each employee (or you can choose 'Accept all suggested statuses'). This'll be based on their age and earnings.

We'll then give you the option to accept our suggested contribution amounts for each employee (or you can choose 'Accept all suggested values'). These amounts are based on the worker group settings selected when you set up your worker groups.

To refresh your memory on what you chose for your worker groups, select the guides and settings icon on the top right of the page.

Final summary

File upload



Guides & settings

Submit your data - file upload

Exit file upload

Upload file

Error check

Starters & leavers

Review & submit

Make a payment

Complete

You're almost there!

Your data is nearly ready for submission. Just check over the summary and if you're happy hit the submit button. We'll process the info overnight and you'll see it on this account tomorrow.

!

Assessed as Entitled or Non Eligible

It looks like you've a new member to the pension scheme with a Non Eligible or Entitled auto-enrolment status. Please check you've received a written opt-in/opting notice asking you to enrol them in the pension scheme. They shouldn't be enrolled automatically. By submitting your file, you confirm you've received the correct written notice.

If you think this isn't right, please check the employee's date of birth and earnings are right. Or correct your data file and payroll software (if you use it) to remove the employee until the written notice has been received, before re-submitting. [Visit our website](#) to read more about this.

Review and submit



	This file	Last file	Difference
Employer contributions	£800.00	£557.84	+£242.16
Employee contributions	£480.00	£743.79	-£263.79
EAC / ELC contributions *	£0.00	£4.47	-£4.47
Total due	£1280.00	£1306.10	-£26.10

* Refers to any EAC/ELC or ELC only contributions.

File details

We'll summarise the details in your file, broken down into an employee summary and a contribution summary.

If you've realised there is an error in your file and you'd like to return and start the file upload process again, you can click 'Cancel'.

If you're happy with the information you've provided please click 'Submit'. You won't be able to edit or delete your data after you've submitted it.

Our systems will process your file within 30 minutes and you'll be able to see it in your Online Services account the following day. You'll also need to sign a declaration stating that to the best of your knowledge, this meets your requirements.

Make a payment

Manage payments

 **Thanks!**
We've got your data. You'll see this on your account when you log in tomorrow.

Time to make a payment

You've submitted your data, the last step is to make a payment for these contributions. Check the payment details and select from the payment options below.

Payments awaiting collection

View recent transactions

Collection date	Amount (£)
27/12/2019	600.00

Did you know your payments can be taken automatically each month?

Simply tick the automated collection box to activate and choose a date between the 1st and 19th. For more information click [help and support](#). If the date you submit your employee data is less than 5 days before your collection date, we'll collect the money for this the following month.

If you don't want to set up automated collection and you know the amount you want to pay – just key this amount into the payment box.

Payment needed

Payment details	
Account name	
Sort code	
Account number	
Total pension contributions	£98.66
Payment amount	£ 98.66
Automated collection	☐ tick to activate
Payment date	02 January 2020

Do not authorise payment

Authorise payment

Once your file has been submitted, we'll ask you to make a payment. We can collect your payments automatically on a day of your choosing. You'll just need to tick the box to activate and select the day you want us to collect any amount due. Schedules need to be uploaded 6 working days before the collection date to ensure they are collected on time. If you prefer, you can choose to make a payment every time you submit employee contribution data to us by leaving this box unticked. You'll need to enter the amount you want to pay and then select 'Authorise payment'.

Please make sure you have the authority to authorise a payment on behalf of the company – if you don't, select 'Do not authorise payment'. You can then ask the person with the appropriate authority to log in to their own Online Services account and select 'Make a payment' from the account home screen.

Payments are due before the 22nd day of the month following your pay period. You can find out more about making a payment on our [help and support page](#).

If you already have a Direct Debit set up with us it's really easy to make a payment. We can collect this automatically – simply tick the box to activate and select a day of your choosing each month. Or if you'd prefer, you can just enter the amount you'd like to pay and click 'Make a payment' – you'll need to do this each time you send us contributions.

Please note, if a file was uploaded previously, without a payment being made, the total contribution amount from that file will also be included on the 'Payment amount' along with the value of your new file. The 'Tick to activate' is for automated collection only. This won't authorise the payment.

