



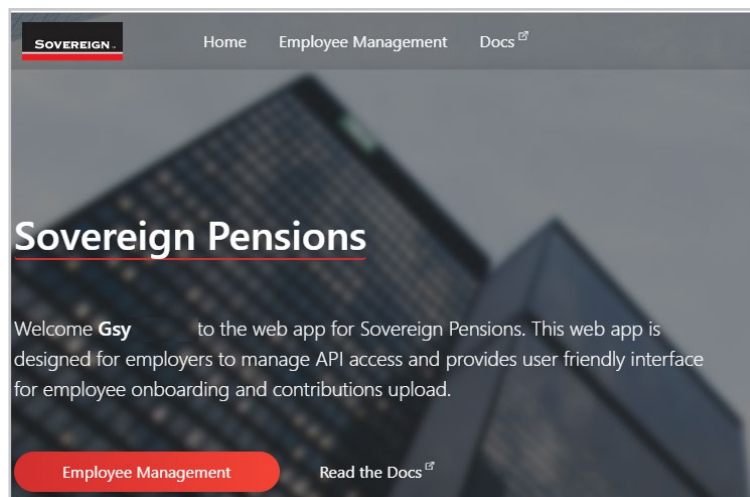
## How to make employee alterations

Your employees can change their residential address, beneficiaries and their investment options via their Member Self-Service Portal. They do not need you to do this for them. Please encourage your employees to do so. There are helpful guides on the [website](#) in the Knowledge Hub to support them.

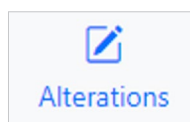
This guide shows you how to make alternations to employee data.

Please make sure your data input is **accurate** because this will be ingested into the Sovereign administration system.

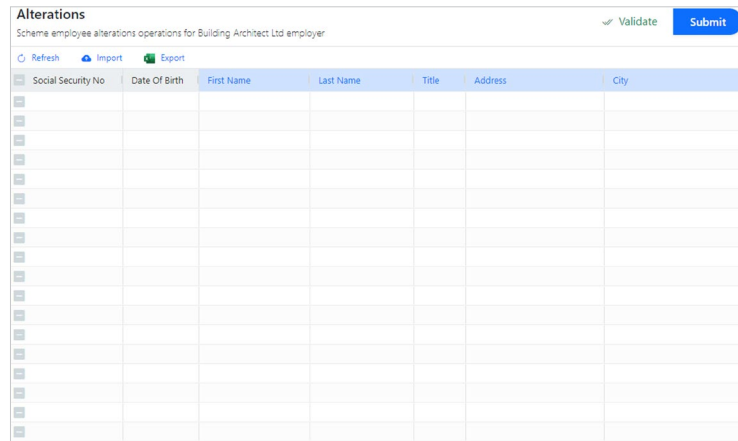
1. Once logged in, click on 'Employee Management'.



2. Once the portal opens, there will be five visible options down the side tab. For this function, navigate to 'Alterations'.



### 3. A spreadsheet-type structure will appear.



The screenshot shows a web interface titled 'Alterations' for 'Scheme employee alterations operations for Building Architect Ltd employer'. It features a 'Validate' link and a 'Submit' button. Below the header, there are 'Refresh', 'Import', and 'Export' buttons. The main area is a table with columns: Social Security No, Date Of Birth, First Name, Last Name, Title, Address, and City. The 'First Name', 'Last Name', 'Title', 'Address', and 'City' columns are highlighted in blue, indicating they are editable. The table contains several empty rows for data entry.

The categories you will need to identify which employee you are wanting to update are both the payroll number and Date of birth.

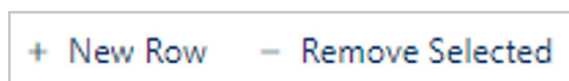
The categories you will be able to update on this sheet are displayed in blue:

- First name
- Last name
- Title
- Address
- City
- Postcode
- Country

### 4. There are **two** options to fill this data in:

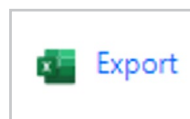
#### a. If you want to populate on the current screen:

- Fill in your updated data and populate all of the relevant fields.
- Click on the individual boxes to populate your data
- To add/remove a row for a new employee, you can click this button at the bottom of the screen.

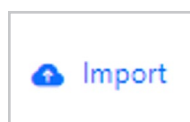


#### b. If you want to populate on an Excel document:

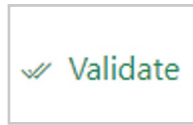
- Click the 'Export' button to download an Excel version of the displayed screen.



- Once downloaded, populate the Excel document with your updated data and populate all of the relevant fields (remember to save any progress you make on this document!).
- Once completed, keep the document saved to your PC. Then on the portal, click the 'Import' button on this 'Alterations' screen and select the completed Excel document.

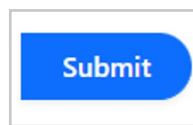


5. Once the data is populated on the portal, the data fields can still be edited in case some last-minute alterations are needed.
6. Once you are happy with the data you've entered, click the 'Validate' button in the top-right of your screen.



This will validate the data you've entered and the portal will let you know of any potential errors made when entering.

7. Once the validation is complete, you can click the 'Submit' button in the top-right of your screen.



8. Your updated data upload is now complete.

### **Additional Information**

If there is any information you wish to change that you can't do on this page, please contact your Sovereign team.

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