

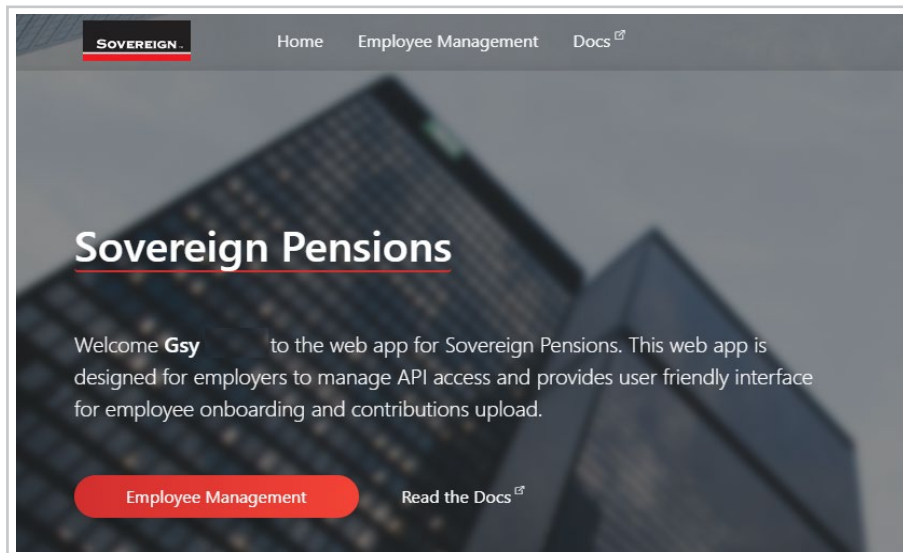


## How to upload any leavers/opt outs

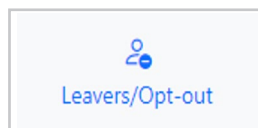
This guide shows you how to process any leavers or opt outs via the Sovereign Upload Portal.

The Sovereign Upload Portal is the “doing” portal. It is to be used for data input and it also provides an “Application Programming Interface” (API) for quick and easy administration. If you are not working with a payroll provider who will do this for you, please follow this guide to upload any employees that are opting out or leaving your employment. Please make sure your data input is **accurate** because this will be ingested into the Sovereign administration system.

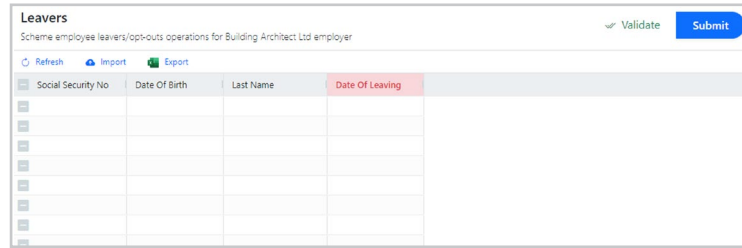
1. Once logged in, click on ‘Employee Management’



2. Once the portal opens, there will be five visible options down the side tab. For this function, navigate to ‘Leavers/Opt-out’.



3. A spreadsheet-type structure will appear on the screen.



The categories on this sheet are:

- Payroll number
- Date of birth
- Last name
- Leaving date

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

**a. If you want to populate on current screen:**

- Fill in your leavers 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:**

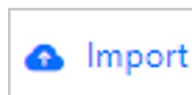
- Click the 'Export' button to download an Excel version of the displayed screen.



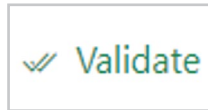
- Once downloaded, populate the Excel document with your leavers data and populate all of the relevant fields (remember to save any progress you make on this document!)
- Once completed, keep the document saved to your PC. Then on the portal, click the 'Import' button on this 'Leavers/Opt-out' screen,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

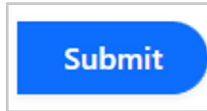


6. Once you are happy with the data you've entered, click the 'Validate' button in the top-right of your screen.



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 Leavers upload is now complete.

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