



How to upload contribution data

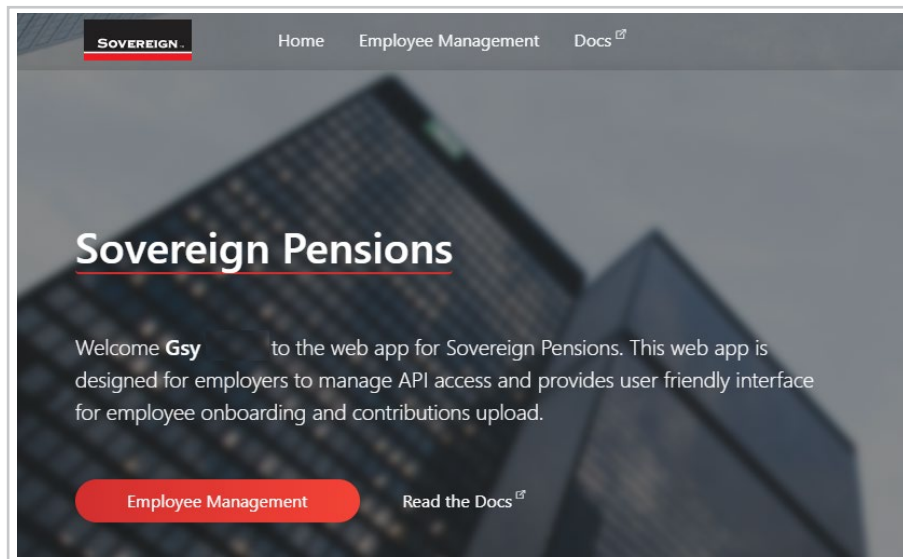
This guide shows you how to upload contribution data into the Sovereign Upload Portal.

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. This API interacts with payroll providers.

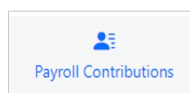
You **do not** need to use this guide if you are working with a payroll provider who will do this for you.

If you are not using a payroll provider, please follow this guide to upload your contribution data. Please make sure your data input is **accurate** because this will be ingested into the Sovereign administration system.

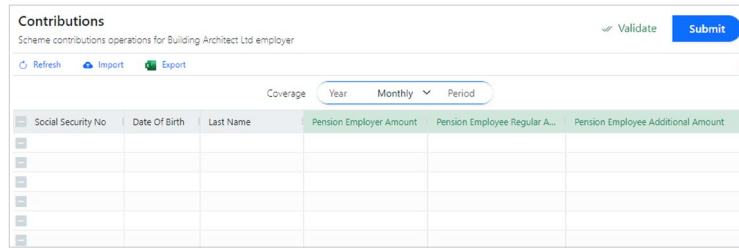
1. Once logged in, click on ‘Employee Management’.



2. Once the portal opens, there will be five visible options down the side tab. For this function, navigate to ‘Payroll Contributions’.



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



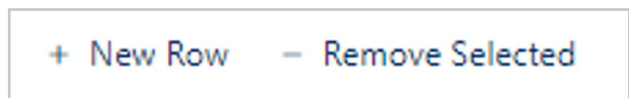
The categories on this sheet are:

- Payroll number
- Date of birth
- Last name
- Pension Employer amount
- Pension Employee regular amount
- Pension Employee additional amount

4. There are two options to complete this data:

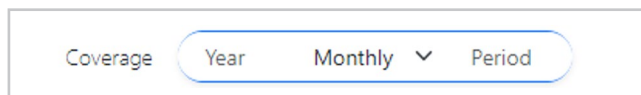
If you want to populate on current screen:

- Fill in your contribution 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.



- You'll see the coverage row above the excel structure.

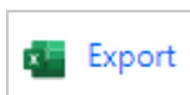
There are 2 options for contribution frequency, monthly and weekly. If you have a monthly contribution, then the Period will be 1 and 12 (1=January and 12=December). If you have a weekly contribution, then the Period will be between 1 and 52, which is the number of weeks within the year.



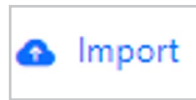
For this, input the period that this contribution data is relevant for.

If you want to populate on an Excel document:

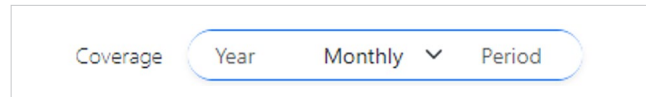
- Click the 'Export' button to download an Excel version of the displayed screen.



- Once downloaded, populate the Excel document with your contribution 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 'Payroll Contributions' screen and select the completed Excel document.

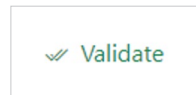


- Once imported, you'll see the coverage row above the excel structure.



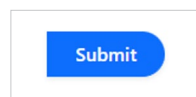
For this, input the period that this contribution data is relevant for.

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 Contribution upload is now complete.

Additional Information:

- To save time in the future: Once you have your first contribution spreadsheet saved on your PC you can use this as the template for your next contribution. Just do a "Save As" and remember to:
 - » Add any new joiners.
 - » Remove any leavers/opt-outs.
 - » Change any contribution amounts.
 - » Save and upload.

If you choose to do this, please ensure that once you have uploaded the data **to choose the correct month and year**. Please also ensure that you validate this information prior to sending it.

- If someone would like to change their contribution amount, you would need to amend the contribution (CDL) template with their new amount if you are reusing the data from previous months or weeks, dependent on the frequency.
- The data field 'Pension Employee Additional Amount' will be used in scenarios such as if an Employee receives a bonus payment and they request a portion of this to be added into their pension. This amount would then be classed as an 'additional amount'.

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