

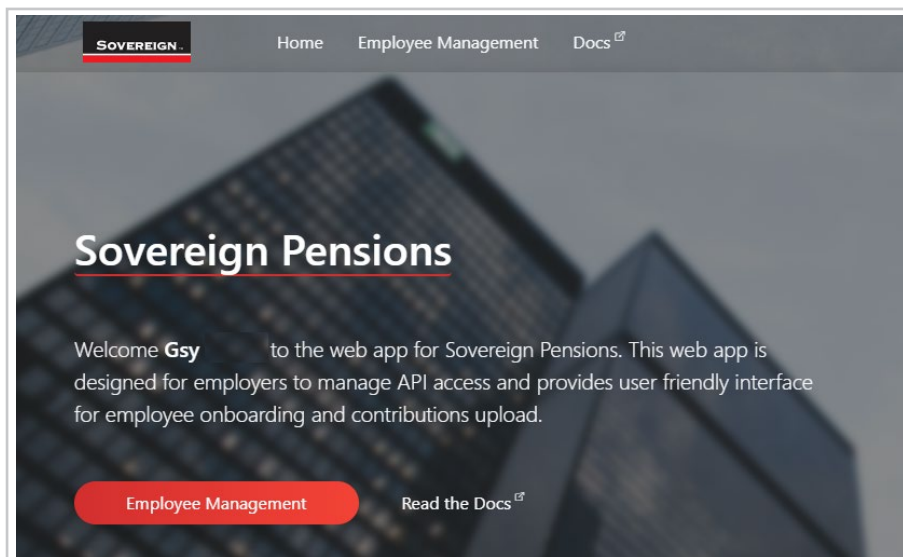


How to upload new joiners

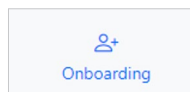
This guide shows you how to upload new joiner data into the Sovereign Upload Portal.

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. If you are not working with a payroll provider who will do this for you, please follow this guide to upload any new joiners and make sure your data input is accurate. Avoid any unnecessary spaces and for the name, input it as you would expect it to be seen because this will be ingested into the Sovereign administration system.

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



2. Once the ‘Employee Management’ page opens, there will be five visible options down the side tab. For this ‘Onboarding’ function, navigate to ‘Onboarding’.



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

Social Security No	Date Of Birth	First Name	Last Name	Title	Gender	Scheme Registration Date	Company Joined Date

The categories on this sheet are:

- Payroll number
- Date of birth
- First name
- Last name
- Title
- Gender
- Date member joined scheme
- Date member joined company
- Email address
- Nationality
- Country of birth
- Address
- City
- Postcode
- Country

4. There are **two options** to complete this data:

If you want to populate on the current screen:

- Fill in your employee 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.



If you want to populate on an Excel document:

- Click the 'Export' button to download an Excel version of the displayed screen. This file will automatically download to your PC.



- Once downloaded, populate the Excel document with your employee 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 'Onboarding' screen, and select the completed Excel document.

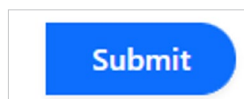


5. Once the data is populated on the portal, the data fields can still be edited in case some last-minute alterations are needed.
6. Once you are happy with the data you've entered, click the 'Validate' button in the top-right of your screen.



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

7. Once the validation completes, a box will appear to signify it has been accepted.
8. Now, you can click the 'Submit' button in the top-right of your screen.



9. You have now completed the process.

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