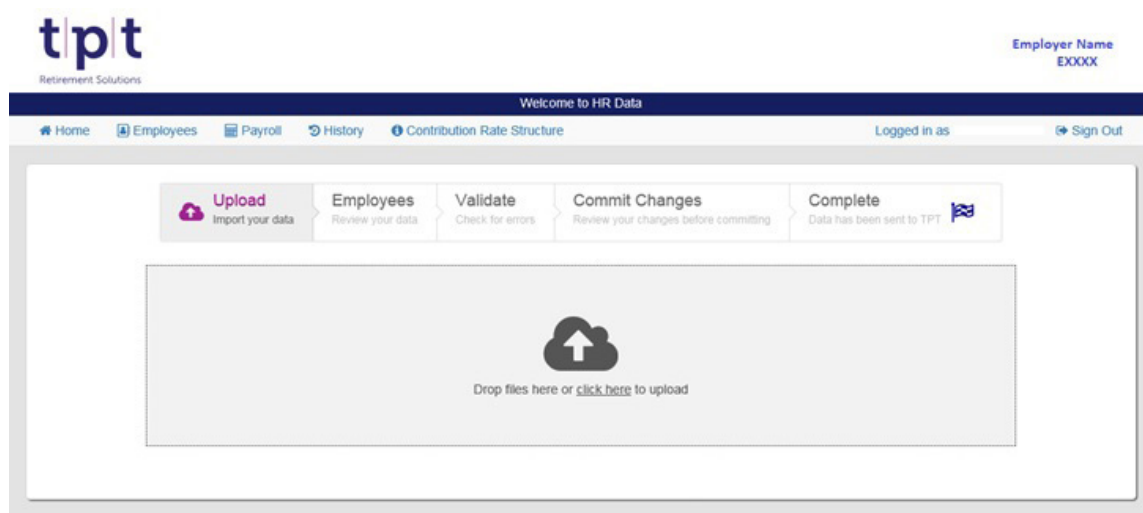
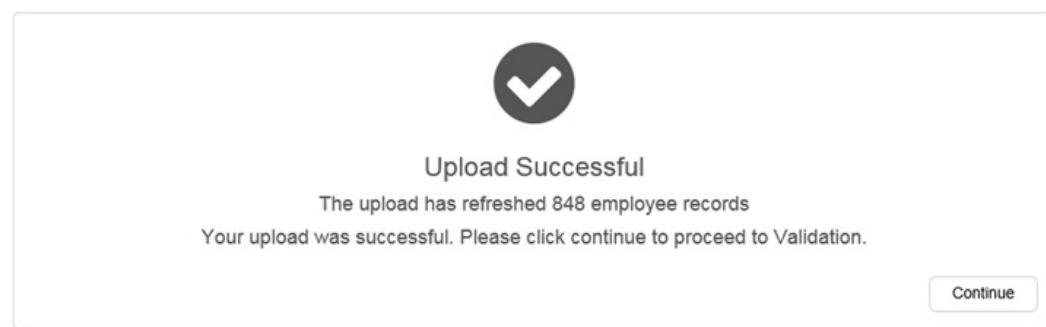


TPT Retirement Solutions

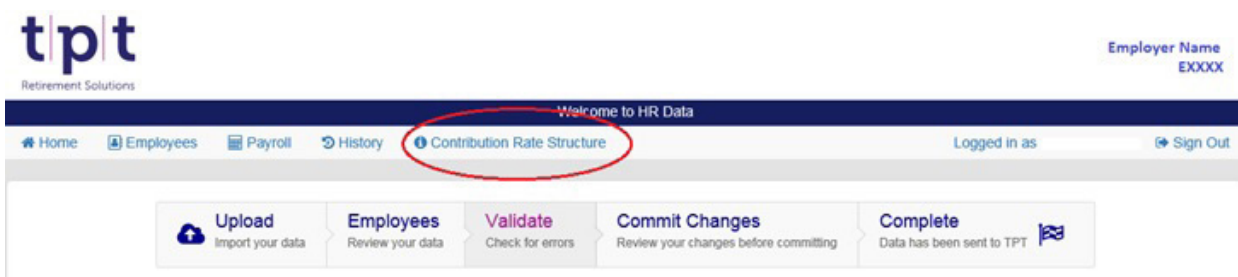
HR Data File Checklist



1. Create or amend your HR Data File so that the information is correct and up-to-date. To do this, login to BenPal and click on **'Download HR Data'** in the **HR Data** tile. This will download a pre-populated copy of the file that you can edit. The mandatory columns to complete will be shaded red. Once you have finished creating or amending the file, save a copy to your system.
2. Please note that if you want to update a member's National Insurance number, payroll number, or date of birth, or re-enrol a leaver, you must do this manually via Manage Employees.
3. Click on **'Upload HR Data'** in the **HR Data** tile.
4. Press **'Click here'** to select your file, or drag and drop the file from your folder into the upload box.
5. If the file does not contain the correct headers, or if the NI number, payroll number, or date of birth for a member do not match our existing records, then the upload will be unsuccessful. The system will provide a Validation Error detailing the problem. Check and amend your file, then press **'Click here'** in the upload box again to reupload. You can also click **'Remove file'** to remove your previous upload from the system.



6. When you see **Upload Successful**, click '**Continue**' to proceed.
7. You will now be shown a list of the employees included on the file in alphabetical order so you can review their information. If you find any errors, click '**Abort**' to return to the upload page, or click a member's row to go into their record and edit their information. If you are happy with the information, press '**Continue**' to proceed.
8. In the Validate section you will find a list of errors that have been identified on the member information. You can download a copy of these errors by clicking the '**Download**' button. Click '**Abort**' to return to the upload page and reupload, or click on a member's row to amend the information online. If there are no validations, the system will skip to the **Commit Changes** page.
9. Click on the member's row to correct the errors online. This will take you into their Employee record. The error messages will be repeated at the bottom of the page, and the fields which errored will be outlined in red. Amend or enter the information as necessary then click '**Save & Next**'. The system will not move on to the next page unless all of the errors have been addressed.
10. If the error message concerns Grades, you can check what contribution rates are associated with each Grade by clicking '**Contribution Rate Structure**' on the top of the screen. Press the Back button to return to the member record after checking.



11. When all the validations have been addressed, you will be able to click '**Continue**' to move to the final stage.
12. The system will now list all changes that will be made as a result of the upload, including the creation of new member records. If you are not happy with these changes, you can click '**Abort**' to return to the upload page or click '**Employees: Review your data**' above the list of changes to edit the member information manually.
13. You can leave the upload process at any point and the system will save what you have done so far. To return to the upload, click '**Upload HR Data**' from the dashboard. The system will ask you to confirm whether you wish to resume or abort your previous upload.

Warning: You have previously uploaded a file without committing it. To continue with your previous upload please click the 'Resume Previous Upload' button. Alternatively you can browse to a new file and your previous upload will be abandoned.

Abort Previous Upload

Resume Previous Upload

14. If you are happy with the changes, click the confirmation box and select '**Commit HR Data**'.
15. The system will confirm that your data changes have been accepted. Click '**Close**' to return to the dashboard.



Your data changes have been accepted

Your HR Datafile has been committed with 2 record changes out of 848 records.

Please click close to return to the dashboard.

Close

Your uploaded data will now be sent to the administration team for processing.

You can review your upload history by clicking into **History** at the top of the screen or by clicking into the History tile on the dashboard. Clicking on a committed file will allow you to view and download the changes made as a result of that upload.



History

[View All History »](#)

View a history of the changes that have been committed to your HR records. This section also includes details of any abandoned changes.