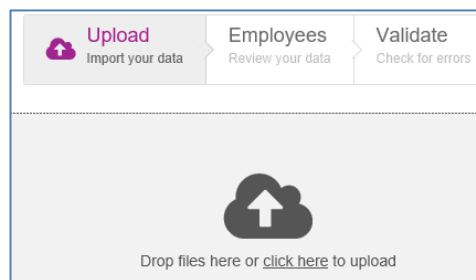


Uploading new joiners

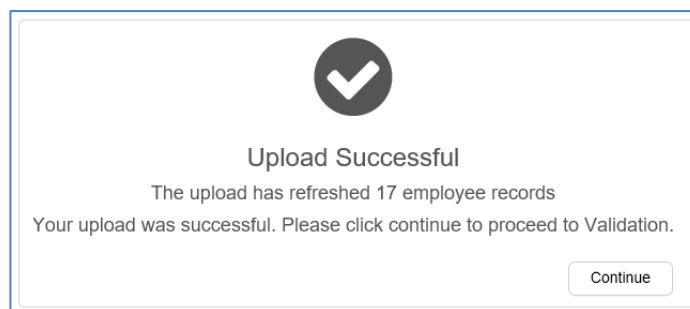
Once the opt out window has ended, new joiner details of members who **did not** opt out must be uploaded via the HR Data file so that membership numbers can be generated. Contributions, including any backdated amounts, can be included in the next monthly contributions submission following receipt of the membership numbers.

Uploading new joiners via the HR Data file

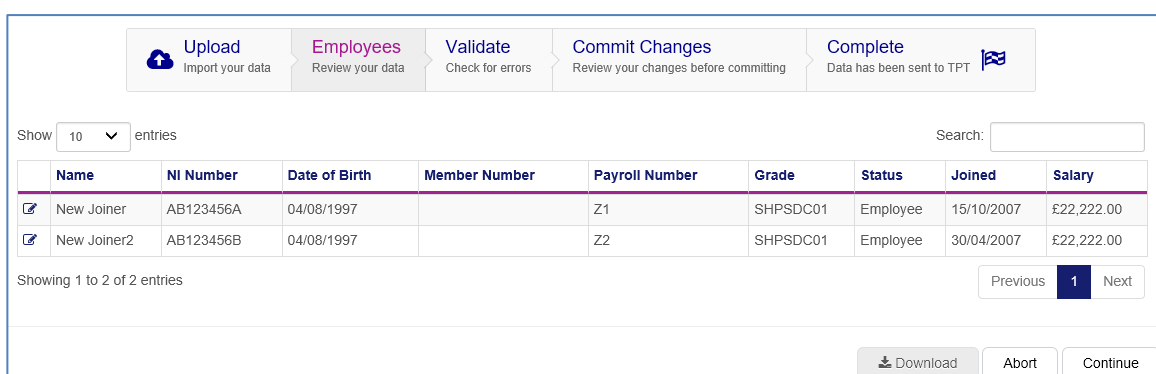
1. Prepare your HR Data File, ensuring that all mandatory columns are complete.
2. Populate the enrolment fields (columns AE-AH). Core Scheme codes are shown on page 2.
3. Login to the HR Data dashboard and select 'Upload HR Data'.
4. Click on the arrow to navigate to your file.



5. Select your file and click 'Open'. Your file will be loaded and any warnings will be displayed.



6. Press 'continue' to proceed with the upload. Your data will be displayed on screen.
7. If you need to amend the data you can press 'Abort' to restart the upload with an amended file.
8. If the data looks correct, press 'Continue' to proceed with the upload.



Show 10 entries

Search:

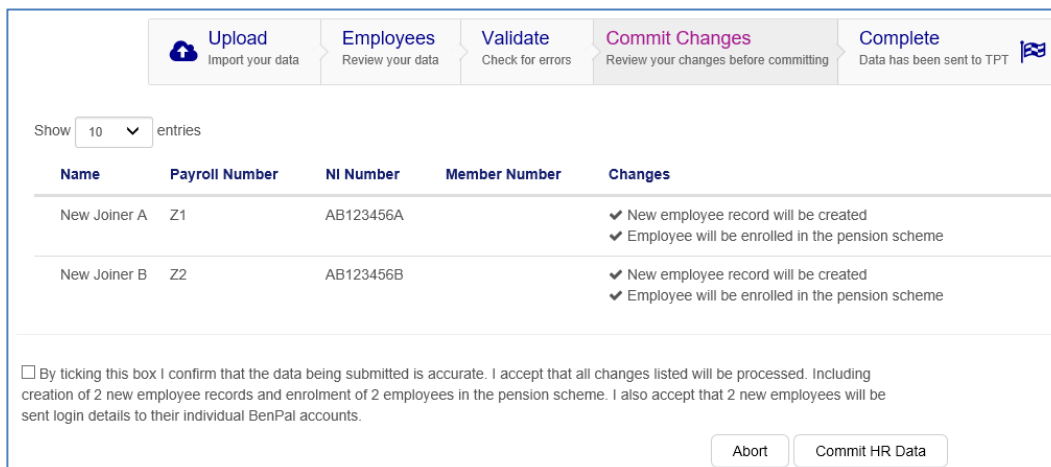
Name	NI Number	Date of Birth	Member Number	Payroll Number	Grade	Status	Joined	Salary
<input type="checkbox"/> New Joiner	AB123456A	04/08/1997		Z1	SHPSDC01	Employee	15/10/2007	£22,222.00
<input type="checkbox"/> New Joiner2	AB123456B	04/08/1997		Z2	SHPSDC01	Employee	30/04/2007	£22,222.00

Showing 1 to 2 of 2 entries

Previous 1 Next

Download Abort Continue

9. The 'Commit Changes' screen will confirm your new joiners have been recognised.



Upload Import your data

Employees Review your data

Validate Check for errors

Commit Changes Review your changes before committing

Complete Data has been sent to TPT

Show 10 entries

Name	Payroll Number	NI Number	Member Number	Changes
New Joiner A	Z1	AB123456A		<ul style="list-style-type: none"> ✓ New employee record will be created ✓ Employee will be enrolled in the pension scheme
New Joiner B	Z2	AB123456B		<ul style="list-style-type: none"> ✓ New employee record will be created ✓ Employee will be enrolled in the pension scheme

By ticking this box I confirm that the data being submitted is accurate. I accept that all changes listed will be processed. Including creation of 2 new employee records and enrolment of 2 employees in the pension scheme. I also accept that 2 new employees will be sent login details to their individual BenPal accounts.

Abort Commit HR Data

10. Confirm the disclaimer and click 'Commit HR Data' to complete your new joiner upload.
11. Your new joiners are now shown in the Manage Employees area with an 'Enrolling' status.

New joiners have been uploaded – next steps

- ✚ Scheme memberships will be created and the member numbers will be visible in the Manage Employees area in 5–7 working days, and will also be confirmed by email.
- ✚ Contributions, including any backdated amounts, can be included in the next monthly contributions submission following receipt of the new membership numbers.

Useful tips for your new joiner upload

- ✚ The enrolment fields of your HR Data file (columns AE-AH) must be completed for an enrolment to occur. Please ensure columns AE-AH of your file are correctly populated for every new joiner.
- ✚ Core Scheme codes, for column AE of a new joiner HR file, are shown below:

Scheme Name	Core Scheme code
SHPS DC	SHPS_DC_65_DC
SHAPS DC	Scottish_Housing_Assoc_Pension_Scheme_DC
Flexible Retirement Plan	Flexible_Retirement_Plan_DC
Growth Plan 4	Growth_Plan_Series_4_DC
Ethical Find	Ethical_Fund_DC
ISPS DC	Independent_Schools_Pension_Scheme_DC
Genesis DC	Genesis_DC_DC
Optivo DC	Optivo_DC
PSES DC	PSES_DC

Contact us for further assistance...

The Employer Support Team is available Monday to Friday 8.30am to 5.00pm
 0113 394 2770 employersupport@tpt.org.uk