









Manually entering employee data

This guide is designed to walk you through entering employee data manually in your employer Online Services account.

This method is suitable for employers who don't use a payroll company or who prefer to enter employee details rather than upload a file.

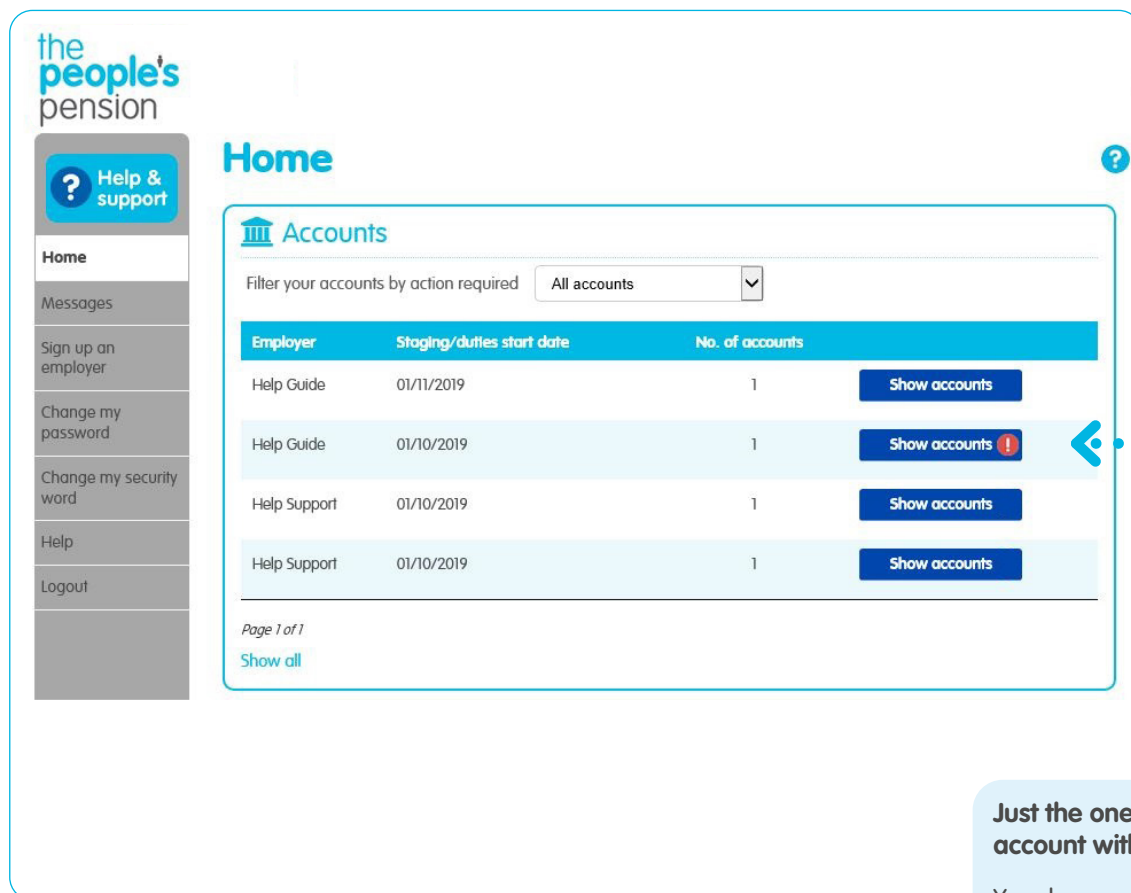


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Manage account – home

After you've signed up with The People's Pension, you'll be able to log in to your Online Services account. Once you've signed in you'll reach the home screen. Here you'll see all the accounts you have access to. It's best you select 'Manage account' from your home screen if you'd like to submit employee data.



Home

the people's pension

Help & support

Accounts


Filter your accounts by action required: All accounts

Employer	Staging/duties start date	No. of accounts	
Help Guide	01/11/2019	1	Show accounts
Help Guide	01/10/2019	1	Show accounts !
Help Support	01/10/2019	1	Show accounts
Help Support	01/10/2019	1	Show accounts

Page 1 of 1
Show all

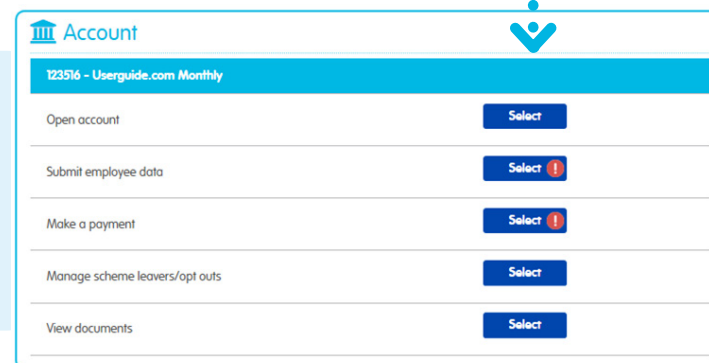
Choose the account you'd like to submit employee data for by selecting 'Show accounts' and then clicking on the cog that appears to the right of the admin account name. If you have access to lots of accounts, you can use the search box above the accounts section to find the one you need quickly.



If you see an exclamation mark  beside the 'Select button', this means you have an 'Action required' on the account you see this against.

Just the one account with us?

Your home screen will look a little different. You can submit employee data by selecting, 'Manage account' from this page.



Account

123516 - Userguide.com Monthly

Open account	Select
Submit employee data	Select !
Make a payment	Select !
Manage scheme leavers/opt outs	Select
View documents	Select

Manage account – submitting your employee data

You'll reach the 'Manage account' screen for the admin account you selected. In the 'Manage employees' section select 'Submit employee data'. Please note, if you see an exclamation mark beside the 'Select' button, this means you have an 'Action required' on the account you see this against.

The screenshot shows the 'Manage account' interface for 'the people's pension'. At the top right, the user is identified as 'test@email.com' with a 'Test Account Monthly - 123456'. The interface is divided into four main sections: 'Manage employees', 'Manage payments', 'Manage employer', and 'Help'. The 'Manage employees' section is highlighted with a blue border and a downward arrow, containing 'Submit employee data' (with a 'Select' button), 'Manage scheme leavers/opt outs' (with 'None to manage'), and 'Manage employee details' (with a 'Select' button). The 'Manage employer' section contains 'Manage worker groups' (with a 'Select' button), 'Company details' (with a 'Select' button), and 'Declaration of compliance' (with a 'Select' button and a red exclamation mark icon). The 'Manage payments' section contains 'Make a payment' (with a 'Select' button), 'Request a refund' (with a 'Select' button), 'Account transactions' (with a 'Select' button), and 'Automated collection' (with an 'Activate' button). The 'Help' section contains 'View documents' (with a 'Select' button), 'Resource library' (with a 'Select' button), and 'Give us your feedback' (with a 'Select' button). A left sidebar contains navigation links: 'Home', 'Account home', 'Manage employees', 'Manage payments', 'Manage employer', 'Help', and 'Logout'. A 'Help & support' button is also present. At the bottom right, there are links for 'Terms of Use', 'Legal', and 'Contact us'. Dotted blue lines with arrows point from the 'Submit employee data' button to the text above, from the 'Account transactions' button to the text on the right, and from the 'Declaration of compliance' button to the text on the right.

If you'd like to view your previous submissions, you'll find this by selecting 'Account transactions'.

You'll need to complete your declaration of compliance when:

- your duties start date has passed or
- you've submitted your first employee data.

You'll need to complete this to show The Pensions Regulator that you're meeting your duties as an employer.

Don't forget, you'll need to complete your declaration of compliance again at your re-enrolment date every 3 years.

Visit our website for [more information about re-enrolment](#).

Getting started – submitting your employee data

Getting started - submitting your employee data

[Back to my account](#)

Intro Setup Useful Info Ready

Familiar with our system?

You can turn off our getting started pages for this account now that you are familiar with the procedure. You can turn them back on again from the guides & settings tab.

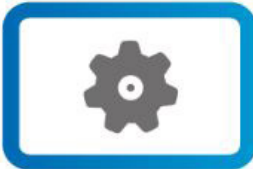
Getting started pages [Turn off](#)

Making sense of it all

Hello Luke, the first thing to know about submitting your employee data is that it isn't scary! The following few pages will introduce you to the process so you are fully prepared.

Step 1

Choose your settings and preferences



[Skip the tour](#)

From here, we'll take you through a quick guide to submitting your employee data. If this isn't your first time submitting employee data or you've changed the upload process, you can click the 'Turn off' button to stop viewing the 'Getting started' pages.

It may be useful to take the tour to find out more about using your account, but you can skip this if you've submitted employee data to us before.

Getting started – your settings

There are a number of ways to customise the way you submit your data to us. And you can change these at any time using the guides & settings tab.

1. How do you want to submit your employee data?

I want to submit a file

What's this?

- Ideal if your payroll software creates a file for you
- Ideal if you have lots of employees or just a few
- Ideal if you plan to use postponement (to delay putting employees into the pension scheme)

Select

I want to enter my details manually

- Ideal if you have just a few employees
- Ideal if you don't have payroll software



Selected

Confirm choice

2. If you're sending your data to us through file upload, would you like to be alerted if your contribution amounts change?

You would like to be alerted at +/- 25%

Edit

3. Understand your tax basis?

Acknowledged

Show

4. Terms and conditions

You have accepted

Show

Continue

There are several different ways to submit your employee data:

- You can submit your data directly from your payroll software using automatic payroll integration, also known as API, if your payroll software provider has this functionality.
- You can upload a file yourself. Depending on your payroll software provider, you may have a full file or maintenance and contribution files to submit.
- You can manually enter your employee data.

We'll remember what you've selected for next time, but you can change this at any time by going to the 'Account settings' tab of our 'Guides and settings' menu.

You can ask us to alert you if your contributions have changed from the previous time you sent us your employee data through any submission.

The 'Terms and conditions' should be read before making the first submission. This should be confirmed as read by the individual submitting the data only and not on behalf of someone else.

To make sure we handle your contributions correctly, we'll ask you to confirm your tax basis. To learn more on this visit [our website](#).

Clicking on 'Continue' will take you to the 'Getting started' page where you can manually enter your data if you've reached your duties start date. Please note, the 'Continue' button will only appear once all the steps have been completed.

Getting started – your settings

Getting started - submitting your employee data

[Back to my account](#)

Intro

Setup

Useful info

Ready

Helping you along the way

We've created a handy guides & settings tab for you, which will follow you through the site. Familiarise yourself with the info below. You can find this anytime when you're submitting a file to us by clicking this icon (it'll be at the top of your screen).

Guides & settings

Your account info

Here are some of your basic account details. You can edit or add worker groups by clicking 'Manage worker groups' from your account homepage.

Account number

Worker group IDs

Employer contribution: 3%, Employee contribution: 4%

EPSR number

Tax basis

For help understanding your tax basis – click on: [Helping you with tax relief](#).

Your account info & help guides

Account settings

Your account info

Account number

Worker group IDs

Employer contribution: 3%, Employee contribution: 4%

EPSR number

Tax basis

For help understanding your tax basis – click on: [Helping you with tax relief](#).

Guides and templates



[File upload guide](#)



[Full file template](#)



[Manually enter data guide](#)



[Error guide](#)



[Employer Online Services guide](#)

You can access your account information at any time by clicking on the 'Guides & settings' option. This may also appear near the top right of your screen when submitting your data.

You may need to access this page when you complete your declaration of compliance or when you set up your payroll software, if you're using one.



Your account info & help guides

Account settings

Settings

Submitting your data

File upload

Manual entry

Contribution change alerts


On

Off

+/- 25 %

Manual entry – submitting your employee data

This is where you'll submit your employee details. If you'd like to manually add your employees to the scheme, click 'Add'.



Let's get started

In order to start the process we'll need your employees' details.

Submit your employee details

Good to know:
You'll need to have your employees' name, address, date of birth, National Insurance number and salary to hand.

Start adding employee data

If you've submitted details for any other employees previously, this will appear on the next page.

You can check the next pay period we are expecting contributions for here.

The file upload option allows you to submit employee data using a file containing all of the relevant details for the pension scheme. To find out more about this method, contact your payroll provider or take a look at our [Uploading employee data file guide](#).

Enter employee data

Pay period: Start: 01/11/2019 End: 30/11/2019

Tax basis: Net

Pay frequency: Monthly

You are sending employee contributions after deducting tax. **Amend**

Tell us about your employees

You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

Assessed as Entitled or Non Eligible

Before you get started, make sure any employees you're enrolling that may have a Non Eligible or Entitled auto-enrolment status have sent you a written opt-in/joining notice asking you to enrol them in the pension scheme. [Visit our website](#) for more information.

Add

Surname	Forename	D.O.B	Unique ID	Options
---------	----------	-------	-----------	---------

Add

Save and continue

Manual entry – submitting your employee data

Complete all of the mandatory fields for your employee. After you've entered an employee's details click 'Save and continue'.

Please note, if you're re-enrolling an employee, their unique ID will need to be different to the one you used before.

Enter employee data

Add new employee

You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

For help on what is needed for each field, please click the [?](#) button.

Title:	<input type="text" value="Please select..."/>	*	Gender:	<input type="text" value="Please select..."/>	*
Forename:	<input type="text"/>	*	Surname:	<input type="text"/>	*
Date of birth:	<input type="text"/>	*	NI number:	<input type="text"/>	?
Unique ID:	<input type="text"/>	*	Mobile number:	<input type="text"/>	
Email address:	<input type="text"/>	?	Worker group:	<input type="text" value="M - Monthly"/>	*
House number:	<input type="text"/>				
Postcode:	<input type="text"/>	*	<input type="button" value="Find address"/>		

[I don't know the postcode](#)

Worker groups are used to identify a group of employees who have the same level of contributions.

Manual entry – entering your employee data

Enter employee data

Pay period: Start: 01/11/2019 End: 30/11/2019

Tax basis: Net

Pay frequency: Monthly

You are sending employee contributions after deducting tax. [Amend](#)

Tell us about your employees

You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

Assessed as Entitled or Non Eligible

Before you get started, make sure any employees you're enrolling that may have a Non Eligible or Entitled auto-enrolment status have sent you a written opt-in/joining notice asking you to enrol them in the pension scheme. [Visit our website](#) for more information.

[Add](#)

Surname	Forename	D.O.B	Unique ID	Options
Sample 1	Test	20/07/1989	1	More details + Edit Delete
Sample 2	Test	04/10/1984	2	More details + Edit Delete

[Add](#)

This alert with prompt you to check if you've received a written opt in/joining notice from any employees whose auto-enrolment status is 'entitled' or 'non-eligible' before you enroll them.

Once saved you'll return to a list of the employees you've entered. You can see additional information by clicking 'More details' beside each employee, and you can edit their information if you need to.

Manual entry – entering your employee data


Enter employee data

Pay period: Start: 01/11/2019 End: 30/11/2019

Tax basis: Net

Pay frequency: Monthly

You are sending employee contributions after deducting tax.

Enter employee earnings to work out who needs to be put into the pension 

You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

Employee	Age	Earnings (Gross)	AE Status	Enrolment date	Employer amount	Employee amount	Leaver
Test Sample 1 More +	31	<input type="text" value="0.00"/>		Check the earnings for each employee, amending as required, then click 'Confirm Earnings' below			
Test Sample 2 More +	35	<input type="text" value="0.00"/>					

Cancel **Confirm Earnings**

Once you've added all your employees' details click 'Save and continue'. We'll then ask you to enter earnings details for each employee.

This will allow us to work out which employees need to be automatically put into the pension scheme and to calculate their contributions.

After this, we'll assess each employee and calculate the contribution amounts based on the percentages you entered. If the contribution amount differs from your payroll after our assessment, you'll need to enter each employee's pension contributions for the relevant pay period.



When you're happy the details are correct click 'Confirm Earnings'.

Manual entry – calculating contributions

We'll calculate pension contributions based on an employee's age and earnings and in line with the worker group settings for the account.

Enter employee data

Pay period: Start: 01/12/2019 End: 31/12/2019

Tax basis: Net

Pay frequency: Monthly

You are sending employee contributions after deducting tax.

Enter employee earnings to work out who needs to be put into the pension ?

You must include your employees' NI numbers. Without these, we won't be able to claim tax relief from HMRC for your employees if you're deducting employee contributions from their pay after tax. You'll find more information on this in our [help and support](#).

Assessed as Entitled or Non Eligible

It looks like you've a new member to the pension scheme with a Non Eligible or Entitled auto-enrolment status – we've highlighted them in the table below. Please check you've received a written opt-in/joining notice asking you to enrol them in the pension scheme. They shouldn't be enrolled automatically. You should not continue unless you've received the correct written notice.

If you think this isn't right, please check their date of birth and earnings are correct. Or click the 'Cancel' button to return to the 'Enter employee data' page and remove the employee(s) until the written notice has been received. [Visit our website](#) to read more about this.

Employee	Age	Earnings (Gross)	AE Status	Enrolment date	Employer amount	Employee amount	Leaver
Test Sample 1 More +	32	750	Non Eligible		0.00	0.00	
Test Sample 2 More +	30	1500.00	Eligible	01/11/2019	29.84	39.52	<input type="checkbox"/>

Cancel
Save and continue

This example is based on 3% employer contribution and 4% employee contribution.

You can manually amend the earnings and contribution amounts for each employee if you need to.

When you submit employee data in each ongoing pay period, there'll be a tick box in the leaver column alongside each employee that's been included in a previous pay period. You'll need to wait until the employee has opted out before ticking this box. You'll know when an employee has opted out as the 'Leaver' column will say 'Opted out' and we'll also contact you to let you know.

If you add contribution amounts for an employee who hasn't previously been enrolled, we'll ask you to provide an enrolment date.

When all information has been added click 'Save and continue'.

If a member has been enrolled to the pension scheme but has now left due to opting out or leaving employment, tick the leaver box to remove the member.

Please note, if you click 'Cancel', all new employees added for that pay period will be deleted. So if this is the first pay period, all employees will be deleted.

Confirm cancellation
✕

WARNING

Canceling will delete all your current progress including any new employees you have entered for this period. Any saved state will be removed.

Do you wish to proceed?

No
Yes

Manual entry – final summary

We'll summarise the details in your submission, broken down into an employee summary and a contribution summary.

Enter employee data

Pay period: Start: 01/01/2020 End: 31/01/2020
Tax basis: Net
Pay frequency: Monthly

You are sending employee contributions after deducting tax.

Summary

Employee summary	
Total Employees	2
Entitled Employees	0
Non Eligible Employees	1
Eligible Employees	1
New scheme members	1
Scheme leavers	0

Contribution summary	
Contribution source	Current data
Employer	£29.64
Employee	£39.52
TOTAL	£69.16

If you've realised there is an error in your file and you'd like to return and start the file upload process again, you can click 'Cancel'. Please note, this will remove any employees you have already added.

If you're happy with the information you've provided please click 'Submit'. You won't be able to edit or delete your data after you've submitted it.

Our systems will process your file within 30 minutes and you'll be able to see it in your Online Services account the following day. You'll also need to sign a declaration stating that to the best of your knowledge, this meets your requirements.

Manage payments – make a payment

Pay dates: Start - 01/12/2019, End - 31/12/2019
Contribution basis: NET

Review payment now due

Your employee data has now been submitted and processed.

Your recent transactions

Date	Reference	Details	Debit (£)	Credit (£)	Balance (£)
22/07/2020	36658992	01 Nov - 30 Nov 19 Payment Schedule	69.16		-669.16
22/07/2020	71016	Admin Charge Invoice (Incl. VAT)	600.00		-600.00
Admin Account Balance					-£669.16

Did you know your payments can be taken automatically each month?

Simply tick the automated collection box to activate and choose a date between the 1st and 19th. For more information click [help and support](#). If the date you submit your employee data is less than 5 days before your collection date, we'll collect the money for this the following month.

If you don't want to set up automated collection and you know the amount you want to pay – just key this amount into the payment box.

Payment needed

Payment details	
Account name	
Sort code	
Account number	
Total pension contributions	
Payment amount	£ <input type="text" value="69.16"/>
Automated collection	<input type="checkbox"/> tick to activate
Payment date	<input type="text" value="12 August 2020"/>

Once your data has been submitted, we'll ask you to make a payment. We can collect your payments automatically on a day of your choosing. You'll just need to tick the box to activate and select the day you want us to collect any amount due. Schedules need to be uploaded 5-6 working days before the collection date to ensure they are collected on time. If you prefer, you can select to make a payment every time you submit employee contribution data to us by leaving this box unticked, and entering the amount you want to pay then select 'Authorise payment'.

Please make sure you have the authority to authorise a payment on behalf of the company – if you don't, select 'Do not authorise payment'. You can then ask the person with the appropriate authority to log in to their own Online Services account and select 'Make a payment' from the account home screen.

Payments are due before the 22nd day of the month following your pay period. You can find out more about making a payment on our [help and support](#) page.

Please note, if you previously submitted data without a payment being made, the total contribution amount from that submission will also be included on the 'Payment amount' along with the value of this submission.

If you already have a Direct Debit set up with us it's really easy to make a payment. We can collect this automatically – simply tick the box to activate and select a day of your choosing each month. Or if you'd prefer, you can just enter the amount you'd like to pay and click 'Make a payment' – you'll need to do this each time you send us contributions.



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