



For employers

# Improved member uploads and contribution guide

It's now faster and simpler – this short guide explains the new process.

## Member uploads



## Contribution schedule



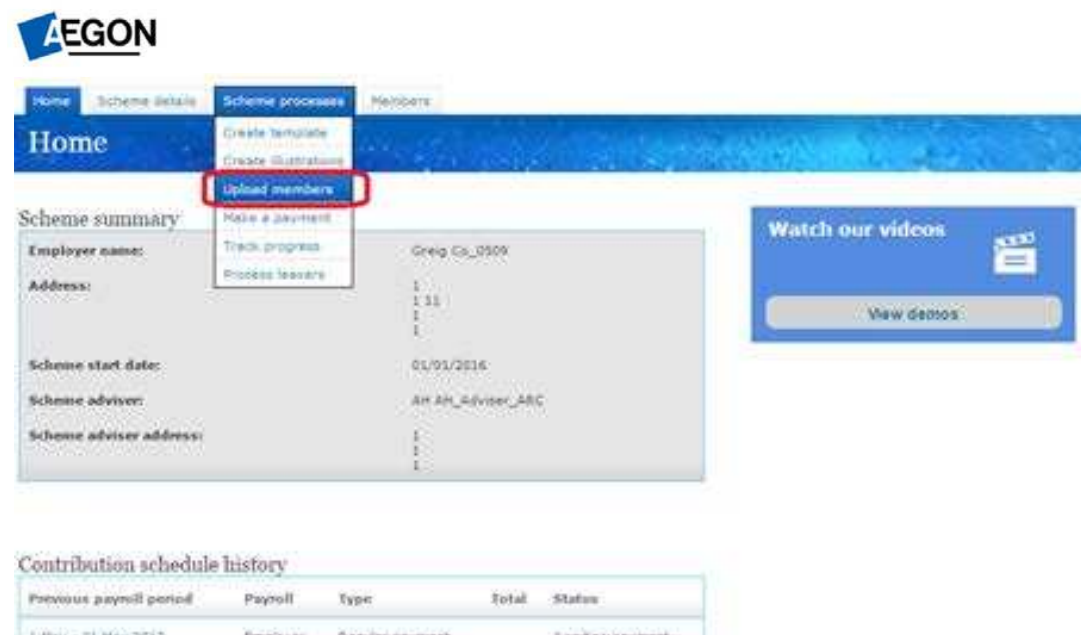
# Member uploads

Action these steps first if you have **new entrants**.

– The new process in 4 steps.

## Step 1:

On the home screen select 'Scheme processes' then 'Upload members'.



Step 1

Step 2

Step 3

Step 4

## Step 2:

On the 'Member Bulk Upload' take the following steps:

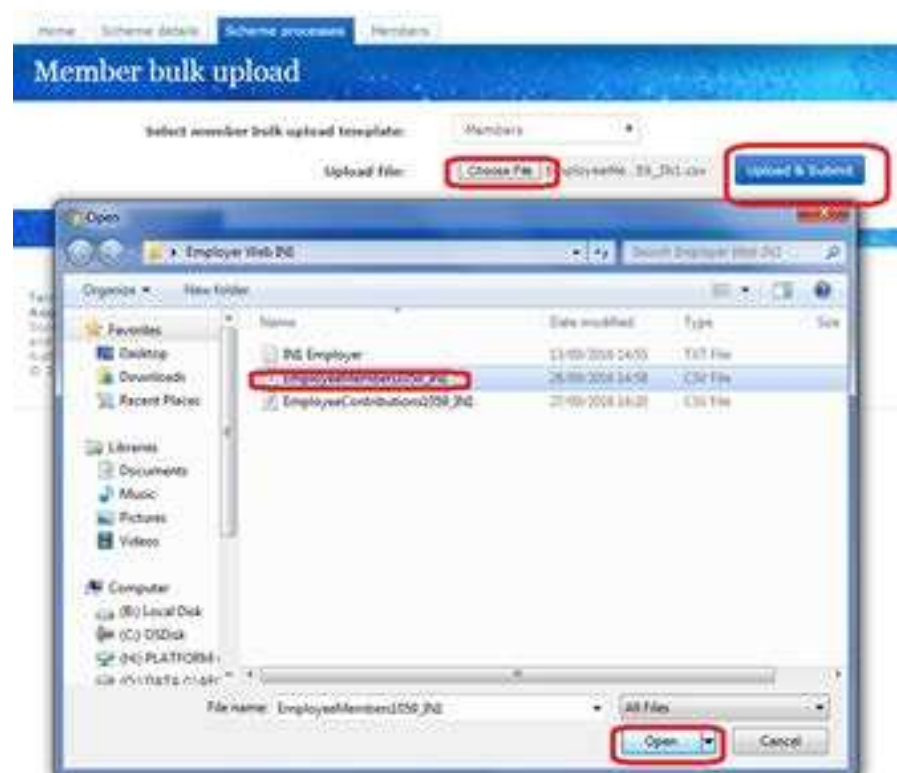
- 1 – Select 'Choose File'
- 2 – Select the relevant file
- 3 – Select 'Open'
- 4 – The box will close, then select 'Upload and Submit'

Step 1

Step 2

Step 3

Step 4



## Step 3:

If successful a message will be displayed and email sent when complete.

The email will state either;

- Successfully completed
- Successfully completed but needing review or action

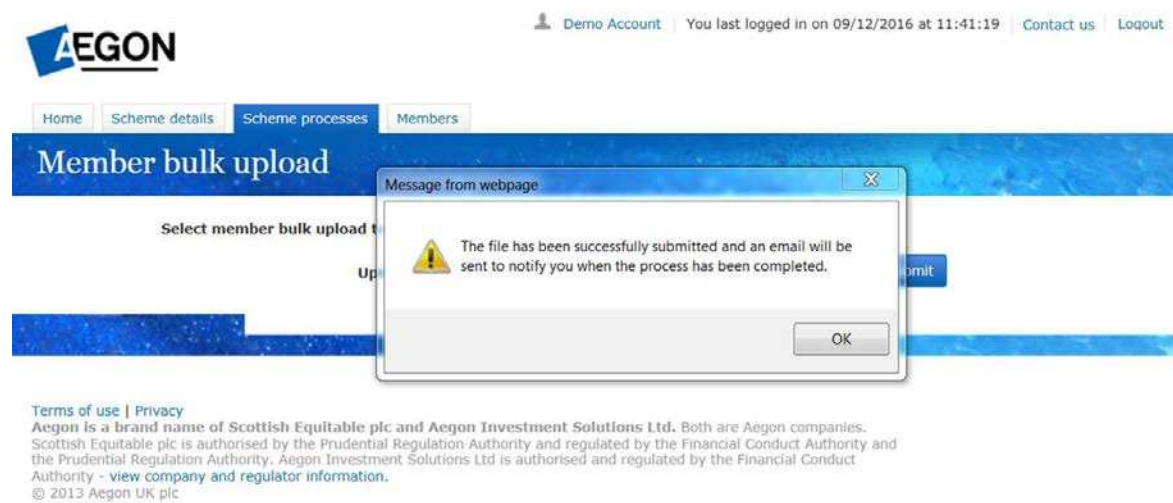
30 Nov 2016 08:54	Member Upload	Completed	No Action Required
30 Nov 2016 08:41	Member Upload	Completed	View Report

Step 1

Step 2

Step 3

Step 4

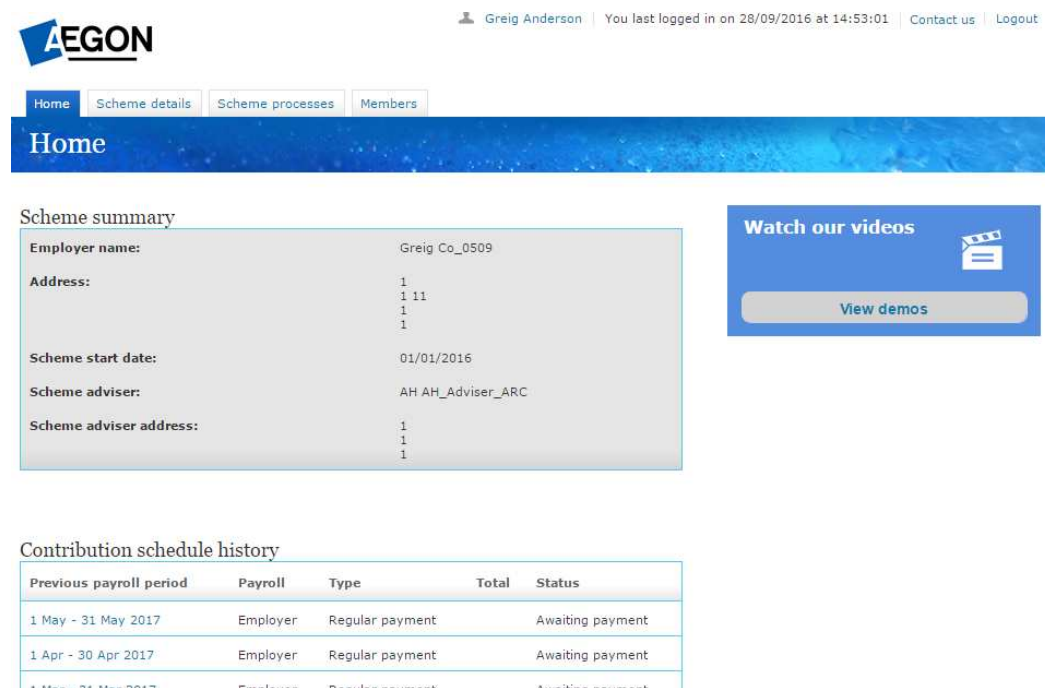


The screenshot shows the Aegon website interface for member bulk uploads. At the top, there is a navigation bar with the Aegon logo and user information: "Demo Account", "You last logged in on 09/12/2016 at 11:41:19", "Contact us", and "Logout". Below the navigation bar, there are tabs for "Home", "Scheme details", "Scheme processes", and "Members". The main heading is "Member bulk upload". A dialog box titled "Message from webpage" is displayed in the center, containing a warning icon and the text: "The file has been successfully submitted and an email will be sent to notify you when the process has been completed." with an "OK" button. At the bottom left, there is a footer with "Terms of use | Privacy" and a disclaimer: "Aegon is a brand name of Scottish Equitable plc and Aegon Investment Solutions Ltd. Both are Aegon companies. Scottish Equitable plc is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Aegon Investment Solutions Ltd is authorised and regulated by the Financial Conduct Authority - view company and regulator information." and "© 2013 Aegon UK plc".

## Step 4:

You'll then be automatically returned to the home screen.

This is where you should notice a faster upload.



The screenshot shows the AEGON member portal home screen. At the top, there is a navigation bar with the AEGON logo on the left and user information on the right: 'Greig Anderson | You last logged in on 28/09/2016 at 14:53:01 | Contact us | Logout'. Below the navigation bar is a blue header with the word 'Home'. Underneath, there are four tabs: 'Home', 'Scheme details', 'Scheme processes', and 'Members'. The main content area is divided into two columns. The left column contains a 'Scheme summary' section with the following details:
 

- Employer name: Greig Co\_0509
- Address: 1, 1 11, 1, 1
- Scheme start date: 01/01/2016
- Scheme adviser: AH AH\_Adviser\_ARC
- Scheme adviser address: 1, 1, 1

 The right column contains a 'Watch our videos' section with a video icon and a 'View demos' button. Below these sections is a 'Contribution schedule history' table.

Previous payroll period	Payroll	Type	Total	Status
1 May - 31 May 2017	Employer	Regular payment		Awaiting payment
1 Apr - 30 Apr 2017	Employer	Regular payment		Awaiting payment
1 Mar - 31 Mar 2017	Employer	Regular payment		Awaiting payment

Step 1

Step 2

Step 3

Step 4

# Contribution Schedule

– The new process in 6 steps.

## Step 1:

On the home screen select 'Scheme processes' then 'Make a payment'.

The screenshot shows the AEGON web application interface. At the top left is the AEGON logo. Below it is a navigation bar with tabs for 'Home', 'Scheme details', 'Scheme processes', and 'Members'. The 'Scheme processes' tab is selected, and a dropdown menu is open, showing options: 'Create template', 'Create illustrations', 'Upload members', 'Make a payment' (highlighted with a red circle), and 'Track progress'. Below the navigation bar is a 'Scheme summary' section with the following details:

- Employer name: Greig Co\_0509
- Address: 1, 1 11, 1, 1
- Scheme start date: 01/01/2016
- Scheme adviser: AH AH\_Adviser\_ARC
- Scheme adviser address: 1, 1, 1

To the right of the summary is a 'Watch our videos' section with a 'View demos' button.

### Contribution schedule history

Previous payroll period	Payroll	Type	Total	Status
1 May - 31 May 2017	Employer	Regular payment		Awaiting payment
1 Apr - 30 Apr 2017	Employer	Regular payment		Awaiting payment

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

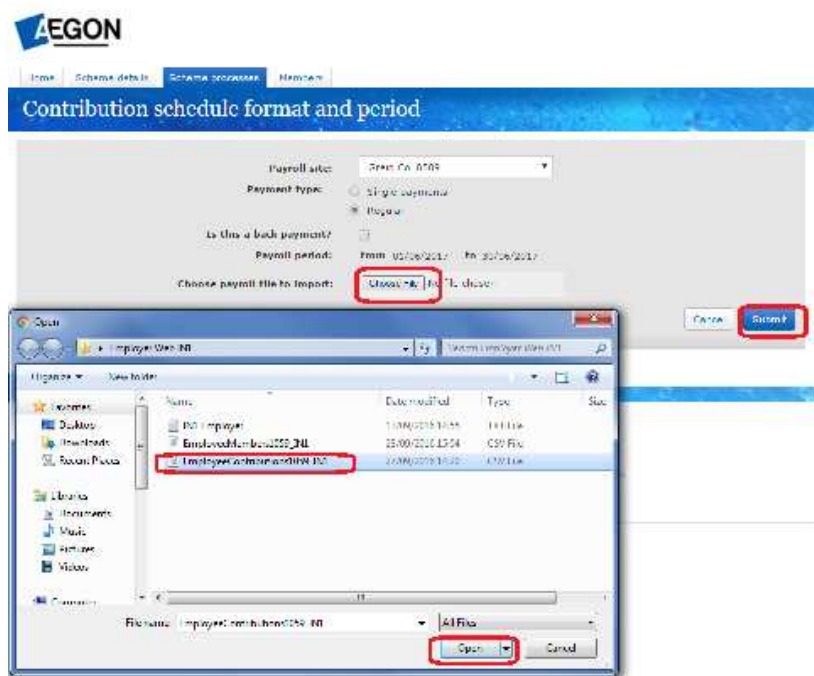
Step 7

## Step 2:

On the 'Contribution schedule and format' take the following steps:

- 1 – Select 'Choose File'
- 2 – Select the relevant file
- 3 – Select 'Open'
- 4 – The box will close then select 'Submit'

If you have new joiners, please ensure they have been added at the 'Member Upload' stage.



### Please note:

If you have a **header row** on your excel upload sheet, it will mean that any row indicated with an error will be a row out – due to your header row.

E.g. a row '10' error will actually be row '11'.

Step 1

Step 2

Step 3

Step 4

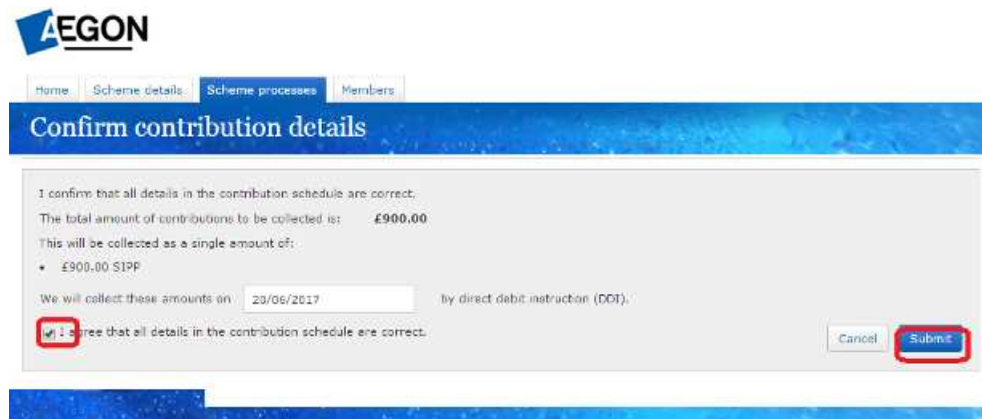
Step 5

Step 6

Step 7

## Step 3:

Tick to agree with payment and select 'Submit'.



**AEGON**

Home | Scheme details | **Scheme processes** | Members

### Confirm contribution details

I confirm that all details in the contribution schedule are correct.

The total amount of contributions to be collected is: **£900.00**

This will be collected as a single amount of:

- £900.00 SPP

We will collect these amounts on:  by direct debit instruction (DDI).

I agree that all details in the contribution schedule are correct.

Step 1

Step 2

Step 3

Step 4

Step 5

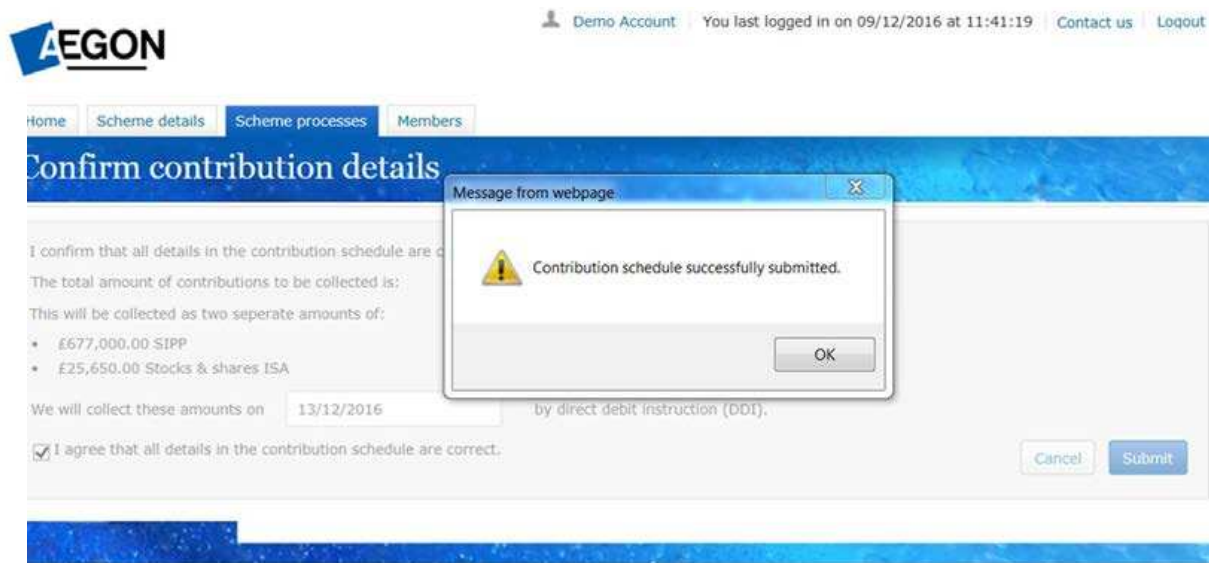
Step 6

Step 7



## Step 4:

Confirmation provided that it's been submitted, you've completed the payment.



Step 1

Step 2

Step 3

Step 4

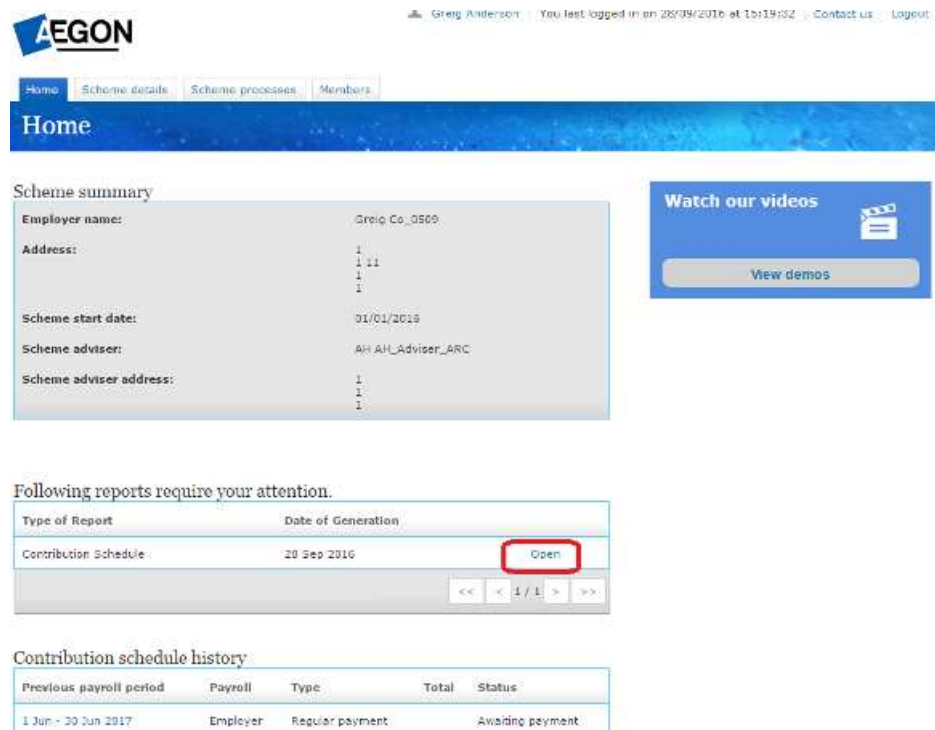
Step 5

Step 6

Step 7

## Step 5:

Exceptions must be viewed by selecting 'Open' and then acted upon.



**AEGON** Greg Anderson | You last logged in on 28/09/2016 at 15:19:52 | Contact Us | Logout

Home | Scheme details | Scheme processes | Members

### Home

**Scheme summary**

Employer name: Greig Co\_0509  
 Address: 1  
 1 11  
 1  
 1  
 Scheme start date: 31/01/2015  
 Scheme adviser: AH\_AH\_Adviser\_ARC  
 Scheme adviser address: 1  
 1  
 1

**Watch our videos**  
 View demos

**Following reports require your attention.**

Type of Report	Date of Generation	
Contribution Schedule	20 Sep 2016	<b>Open</b>

<< < 1 / 1 > >>

**Contribution schedule history**

Previous payroll period	Payroll	Type	Total	Status
1 Jun - 30 Jun 2017	Employer	Regular payment		Awaiting payment

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

Step 7

## Step 6:

Exception reports can be reviewed and amended separately.

Leavers will need to be updated before your next contribution upload.

Date		28/09/2018	
User	Greg Co_8509	Process type	Contribution Schedule
Template Name	Contributions	Batch run ID	3060917
		Rows processed	30
		Rows failed	0
		Total rows	30

### Employee details not updated:

Row Number	Investor ID	Employee Name	Payroll Ref	Error Details
4	20504430	RogerA Anderson	AP180	Contribution details are missing.
5	20504430	RogerA Anderson	AP180	Contribution details are missing.
6	20504430	RogerA Anderson	AP180	Contribution details are missing.
7	20504547	Ally Stewart	AP200	Contribution details are missing.
8	20504548	John Stewart	AP201	Contribution details are missing.
9	20504549	Smithy Stewart	AP202	Contribution details are missing.
10	20504550	James Stewart	AP203	Contribution details are missing.
11	20504551	Bobby Stewart	AP204	Contribution details are missing.
12	20504430	RogerA Anderson	AP180	Contribution details are missing.

### Non-Contributors with invalid status:

Row Number	Investor ID	Employee Name	Category	Site	Status	Status-Old	Status-New
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### Contributions outside expected tolerance:

Row Number	Investor ID	Employee Name	Category	Site	Status	Employer Contribution expected	Employer Contribution actual	Salary sacrifice expected	Salary sacrifice actual	Member Contribution expected	Member Contribution actual
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### Employee details updated (based on the file):

Row Number	Investor ID	Employee Name	Field	Old	New
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Please see the next page for exception report assistance.

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

Step 7

## Step 7:

### Data validation

The existing process will still apply – for example date formats and National Insurance numbers. To help you, please use our data validation tool, which is available for download here.

### Exception reports

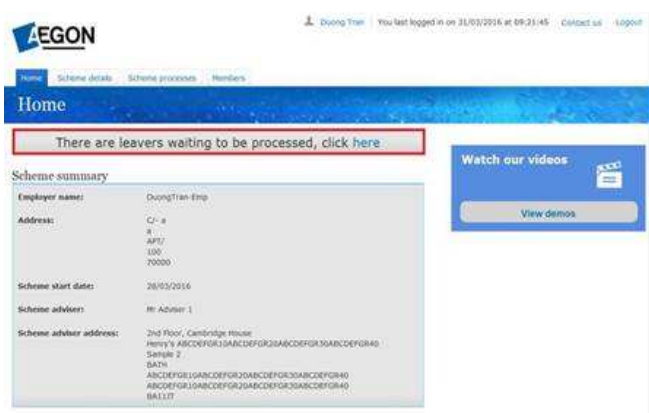
If you receive an exception report please ensure you undertake the action/s required, as it will ensure your data is up-to-date and correct as possible.

### New joiners

- Up to five new joiners can be loaded on screen. If you have more than five new joiners then please add these at the 'Member Upload' stage.
- We'd always recommend adding any new joiners at the 'Member Upload' stage.

### Updating non-contributors

- Before your next payroll run you must update your non-contributors – see the box highlighted in red below.



If you need any assistance, please contact the support team: 0345 680 1234 or email [clientsupport@arc.aegon.uk](mailto:clientsupport@arc.aegon.uk)

Step 1

Step 2

Step 3

Step 4

Step 5

Step 6

Step 7