Contributions Submission Process

A step-by-step guide to submitting your monthly contributions

1 | Log into the system by entering your Username and Password. Then click 'Login'.

2 | Click 'Upload Contributions' (this step is only applicable to those who use BenPal for member access).

3 | Click 'Manage Contributions'.

4 | Select 'Download a copy of your recent contribution data to edit and upload later'.

- Open the file and save it to your computer.
- Amend the data as necessary.
- Save the file as a .csv (comma delimited) type.

5 | When you are ready to submit your file, select 'Submit your contributions file'.

6 | The month shown as the Contribution Period is the next month we expect contributions for. If you believe the wrong month is showing, please contact the Employer Support Team.

7 | Select 'Choose File' to select the file that you have just saved.

8 | When you have chosen the file you wish to upload, select 'Upload file'.

9 | If your file won't upload it will be due to formatting issues with your file, for example, a missing column, or the data in the columns formatted incorrectly. Check your file, amend it as necessary and try to upload it again.

10 | If when you have uploaded the file, your column headers in your file are incorrect, the system will ask you to map the column headers to what we expect. Any incorrect ones will be displayed in the validation results at the bottom of the screen. Once you have selected the column headers in the drop down box click 'Import my data'.

11 | Once the data has been successfully uploaded you may be shown a list of missing members. These are members for whom active records remain open and for whom contributions are expected. You should click the 'Add missing members automatically' button to add these members into your submission. In some cases the record might in fact be a leaver. In these cases you should enter a date of leaving. Where a contribution is due for this member you must enter the relevant amounts.

12 | Check the contributions amounts in the Payments Summary. As these totals come directly from the file you have uploaded, if you don't agree with them you need to look at your file again and amend the amounts as necessary. Save the file and submit it again.

13 | In order to submit your file, you need to select the 'Submit Data' button. If this is greyed-out, it is because there are validation issues that you need to fix before you can submit. In this case, please follow these steps:

- Tick the 'Show Errors' and 'Show Actions' buttons. Any members left on the screen have data validation errors or actions which you need to resolve.
- Click 'Edit' on the left-hand side against the first member on the list.
- The errors or actions will be described in the Validation Results at the bottom ofthe screen. You need to work through these until there are none left. You can also amend any values on screen by clicking in the relevant box.
- Click 'Next' to take you to the next member with errors or actions.
- Carry on working through the errors and actions and clicking 'Next' until you get to the end, when 'No further records' will be displayed.
- Click 'Finish' to return to the main contributions screen.
- The 'Submit Data' button should now be active. If not, it means you still have errors/actions that you need to resolve. Repeat the steps above until the 'Submit Data' button becomes active and you can click it.

14 | You can save your progress at any point, stop what you are doing and come back to it later if you wish. To resume, use the 'Pick up where I left off' button which is under the 'Manage Contributions' menu.

15 | When you are ready to submit your file, click the 'Submit Data' button.

16 | Confirm you wish to submit.

17 | Your Payment Request will be emailed to you once we have fully processed your file. Please do not send a payment until you have received this. Those employers who are on Direct Debit do not need to send a payment - we will take the payment automatically once the data has been processed.

If you have any questions about this then please contact the Employer Support Team:
Tel: **0113 394 2770**   Email: **employersupport@tpt.org.uk**

Verity House, 6 Canal Wharf, Leeds LS11 5BQ   **Tel:** 0113 234 5500
Email: enquiries@tpt.org.uk   **www.tpt.org.uk**

t|p|t
Retirement Solutions