eBusiness Summarised Submission Guide

The Pensions Trust

Contents

1.0 Overview

eBusiness is The Pensions Trust's Online Pensions Management System. It is a secure method for employers to:

- submit monthly contributions data;
- inform The Pensions Trust of internal transfers; and
- complete leavers online.

The purpose of this Guide is to assist you, the employer, in submitting monthly contributions data via the eBusiness system for the first time. This is a condensed version of the eBusiness Submission Guide which is available in the Document Library described below.

There is also additional support available through the relevant Helpdesk (details are provided at the end of the Guide). Additional support documentation and online tutorials can also be accessed through our website at **www.thepensionstrust.org.uk > Document Library > General Literature > eBusiness Literature**, or for the Social Housing Pension Scheme (SHPS) and the SFHA Pension Scheme, via your scheme specific website.

2.0 Logging On

Step 1: To Connect

You will have been provided with a unique Username and Password which will have been sent from the email address 'helpme@thepensionstrust.org.uk'

- Please log onto the internet and go to the eBusiness login page at **https://www.online.thepensionstrust.org.uk/**

- Enter your Username and Password in the relevant boxes and follow the instructions to set up your secrets and choose your own Password.

3.0 Submitting Contributions

Step 2: Manage Contributions

This area of the system enables you to enter/upload your data for validation. Once any validation results have been satisfied you will be able to submit the data to us for processing.

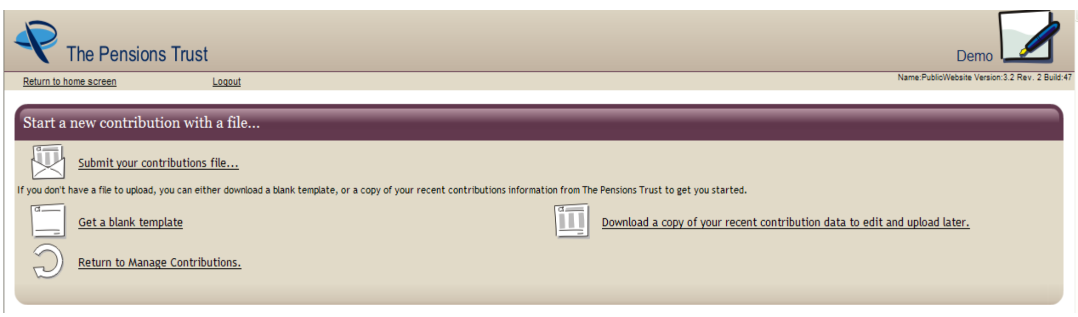
After logging in you will now be at the '**I** want to...' or Index screen.

- Click on the ***'****Manage Contributions'* option.
- Click on the *'Start a new contribution by uploading information in a file'.*

Step 3: Preparing a Spreadsheet

Having clicked on '*Start a new contribution by uploading information in a file' you* will be taken to the following screen as shown in **Fig 1**.

Fig 1



Click on *'Download a copy of your recent contribution data to edit and upload later'*.

By clicking on this option, you will receive a spreadsheet in the correct format, populated with the member data currently held by The Pensions Trust.

- Please open the file, check the data is correct and amend it where necessary.

If you are submitting contributions for the first time, you may need to add in the data under column H, Monthly Pensionable Earnings (MPE).

Please note: MPEs is the salary the member has been paid for that month and on which they are paying pension contributions.

- Please ensure you save this spreadsheet so you can find it later. The spreadsheet is open on your system, therefore if you do not save it onto your computer system, any changes you make will be lost.

You should have been provided with an eBusiness User Checklist when you were given your access details to the system. Please use this to ensure the spreadsheet is formatted correctly before you attempt to upload your data.

Step 4: Uploading a Spreadsheet

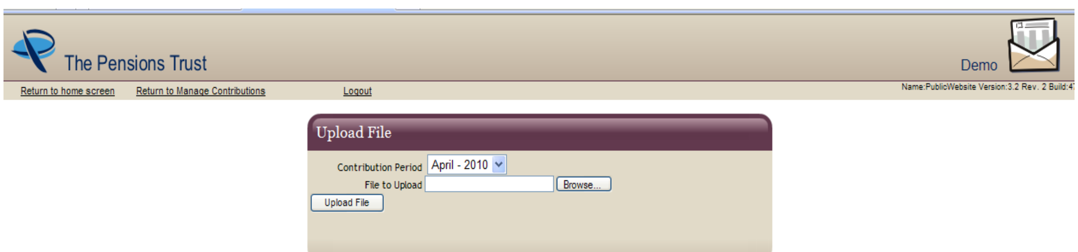
Your spreadsheet is now prepared and saved on your computer system. You can now use this spreadsheet every month, simply update it where required.

You are now ready to upload your spreadsheet in order for eBusiness to validate the data so you can submit it to The Pensions Trust.

- Click on '*Submit your contributions file'* (see **Fig 1**).

You will now be at the screen shown below in **Fig 2**.

Fig 2



This screen should show the next month due.

- Please check you are submitting data for the correct month. If not contact The Pensions Trust.

- Click on the grey box entitled *'Browse'*. (This takes you into your own system and searches for Excel files.)

- Find your data spreadsheet (remember it will be saved as a .CSV file, so you will need to select *'All Files' in the 'File Type'* field, not Excel only).

- Double click or open the file and this will insert the file path into the blank box***.***

- Now click on the grey box entitled *'Upload File'*.

Step 5: Prepare and Upload Contributions

You will now be on the *'Prepare and Upload Contributions'* page. This stage is designed purely to check the column headings on your Excel spreadsheet. This screen will only ever display the first three members as a reference.

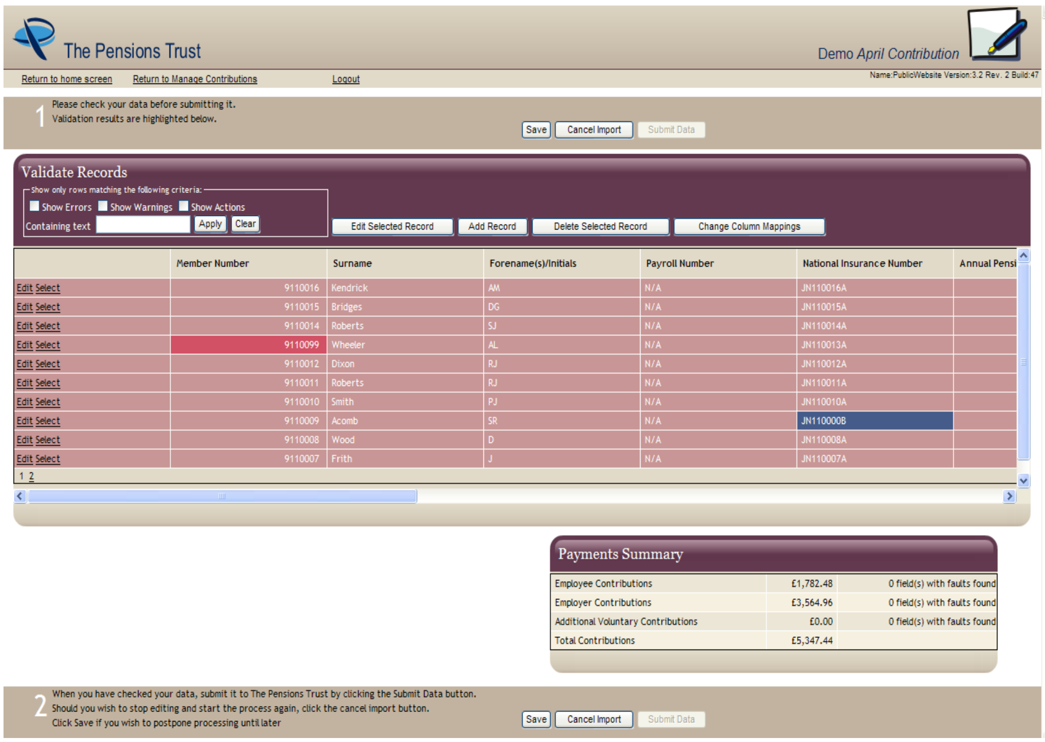
- Click on *'Import my data'* to take you to the data validation stage.

Step 6: Validate Records

This is the stage where the majority of the work is carried out. You will see a screen listing all the members on the spreadsheet as shown in **Fig 3.**

At this stage, eBusiness checks the data provided and queries anything which doesn't match the data already held or the figures the system expected.

Fig 3



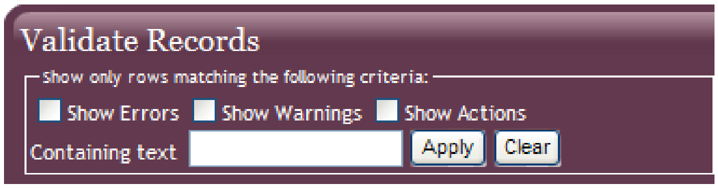
There will not necessarily be queries on the data everytime, but if there are, the system will not let you progress until you have amended or confirmed your data.

If the system has queries, the *'Submit Data'* box will be greyed out, as shown above.

Rather than having to work through the whole list, the system allows you to filter the members there are queries on. As shown in **Fig 4**, under the area that says *'Validate Records'* there are three small boxes, entitled *'Show Errors'*, *'Show*

Warnings' and *'Show Actions'*. You can click on the boxes to put a tick in them (you can do this one at a time or put a tick in all of them). This will provide you with a list of the members with queries only.

Fig 4



Validations are broken down into the following categories:

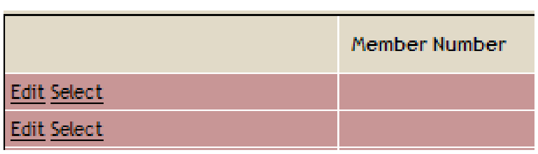
Warnings will not prevent you from submitting. They are simply things the system would like you to check.

Actions refer to data that the system would like you to confirm or explain. You will need to check your records and either amend the data or confirm the data is correct and provide an explanation.

Errors refer to data that the system has identified as incorrect. You will need to amend the data to proceed.

On each row of data at the very left-hand side of the screen, are the underlined words, *'Edit'* and *'Select',* as shown in **Fig 5***.*

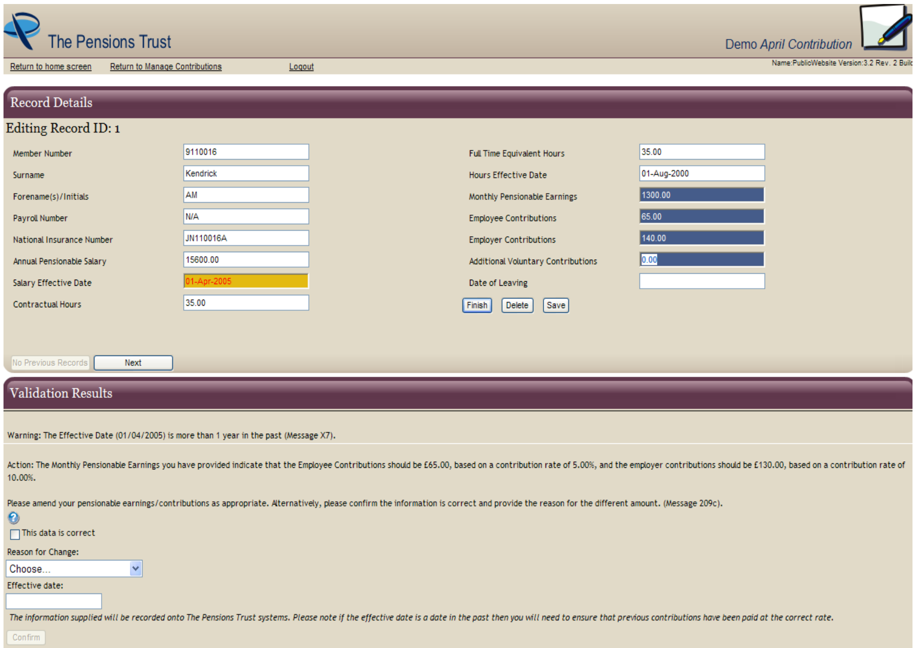
Fig 5



	Member Number
Edit Select	
Edit Select	

- Click on *'Edit'* on the member at the top. This takes you into the individual member's data as in **Fig 6***.*

Fig 6



The query will be highlighted in a different colour and in the *'Validation Results'* section underneath the member data, there will be an explanation of what the system is unsure about.

- If you need to amend the data, simply type in the correct information, then either press tab or click outside the box to revalidate the data. If the data you have provided is correct, please put a tick in the *'This data is correct'* box in the *'Validation Results'* section and follow the rest of the instructions underneath.

- Work through all your validation queries using the *'Previous'* and *'Next'* buttons where required.

Once you have completed all queries, the *'Previous'* and *'Next'* boxes will say *'No previous records' or 'No further records'*.

- At this point, click on the grey box entitled *'Finish'* to return to the *'Validate Records*' screen.

Please note: When you click *'Finish'* the system will automatically save your progress.

You will now be back at the screen shown in **Fig 3** on page 5.

- If you untick the *'Show Errors'*, *'Show Warnings'* and *'Show Actions'* boxes all of the members will now reappear.

The grey box entitled *'Submit Data'* should now be active.

Check the '*Payments Summary'*, to make sure the amount is what you are expecting to pay.

Your submission total **MUST** match the amount you pay, as The Pensions Trust can only process the contributions if the figures match exactly. If not you will need to amend your submission and make good any shortfall or the payment may even be returned.

- Please now click on the grey *'Submit Data'* box.

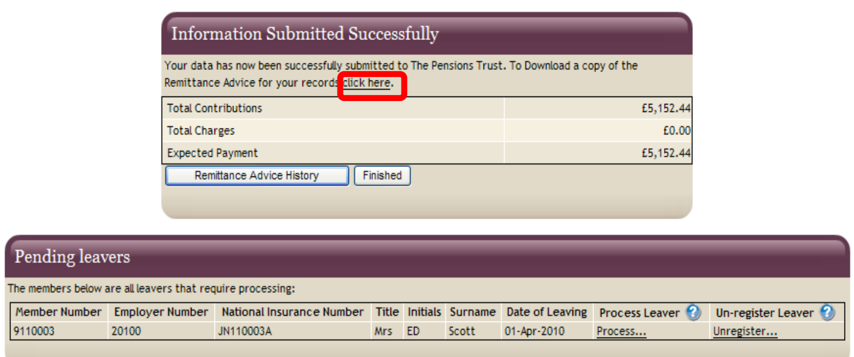
The next screen will display any leavers identified from your submission and ask you to confirm you wish to submit.

- If you are ready to submit, please click on the '*Confirm'* box.

Remittance Advice, as shown **Fig 7***.*

In the next screen you can if you wish, print off a Remittance Advice where highlighted in **Fig 7**.

Fig 7



Completing the submission process

- Once everything is complete, click on the *'Finished'* button.

The data will now be held by The Pensions Trust and will be processed onto the members' records once the matching payment is received.

Please note: Until the contributions are processed at The Pensions Trust, if necessary you can access your submission again via '*Pick up where I left off'*, where you can amend and resubmit if necessary. Once the contributions have been processed, you will be unable to access the contributions for two days to allow the figures to be fully extracted onto the member records.

4.0 Contact Us

Should you have any difficulties or queries please contact the relevant Helpdesk on:

For the Social Housing Pension Scheme (SHPS) or the SFHA Pension Scheme:

Tel: 0845 121 7238
Email: ebusinessassistance@thepensionstrust.org.uk

For all other schemes:

Tel: 0845 123 6200
Email: helpme@thepensionstrust.org.uk

The Pensions Trust

Verity House, 6 Canal Wharf, Leeds LS11 5BQ
tel: 0113 234 5500 fax: 0113 234 5599

email: enquiries@thepensionstrust.org.uk
or visit www.thepensionstrust.org.uk

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