Preparing to conclude an agreement on the operations PPK in the PPK Service application

Preparation of the List of Participants

After concluding the PPK management agreement, the employer is required to conclude a contract for the operation of the PPK in the name and on behalf of the employees. In order to do this, it is necessary to notify the List of Participants for whom the agreement will be concluded.

1. Prepare the appropriate data file

The employee data file (xml or csv) must comply with the specification of the Standard recommended by the PPK Project Group, specifying which data is required. A description of the Standard can be found in the PPK Service in the field for importing data (see point 3).
Some HR and payroll applications have an option to generate a file for PPK that complies with the Standard described above.

2. Log in to PPK Service

Employees, notified by their employer as "administrators" of the application, received a welcome packet with a link to the PPK Service by email. If you did not receive the link or have forgotten your password go to: https://ppkservice.psfinteco.pl/ppk/login and use the "Remind Password" option. The login is the administrator's email address.

3. The next step is to import the file with the List of Participants for whom the contract of conduct (UoP) is to be concluded

4. Import the file in the *Source of data.*

5. Verify the data preview and run the import.

The fact that a file has been imported does not yet mean that a lead contract has been concluded. Employee data has been uploaded to the system, but it is in the "waiting room" and awaiting the conclusion of the contract.

6. Go to the „Employees" tab – do not click „*Conclude a UoP*"

Here, check the statuses of the lead contracts located in the upper right corner.

Contract statuses:
- concluded - at the first import of the List will always be (0)
- formal errors - you should focus on these employees, because for them you will not be able to conclude a PPK agreement. Click on this status and the system will show us only those employees where the data is wrong or there are some gaps.

By clicking on the employee's data there will be information about errors or deficiencies. You should check these records and remove the reason for such status.

Status *none, formal errors* may occur if the list includes an employee who is older than 55 and, according to the PPK Law, the employer must receive a declaration from the employee to enter into a PPK agreement. If the employee has made such a declaration, simply uncheck this option and save the changes

We need to get to a situation where it will be possible to conclude contracts on behalf of all employees for guidance - the status of formal errors (0).

7. Removal of employees prior to the conclusion of the agreement to operate the PPK

In a situation where there is a person on the list of employees who should not appear on it (for example, he has already submitted a notice of resignation) at this stage you can still remove his data. Click in the details of the employee in question and select Delete from the top menu. It is possible to delete individual records, it is not possible to delete several employees at the same time.

NOTE: It is not possible to delete the data of an employee after the conclusion of a UoP Contract

8. Conclusion of the agreement on the operation of PPK

The PPK agreement is concluded only after clicking on „*Conclude a UoP*". You can conclude an agreement for a specific employee by clicking on the above-mentioned field next to his or her data, or conclude an agreement for all employees with a single click from the statuses of the agreement.
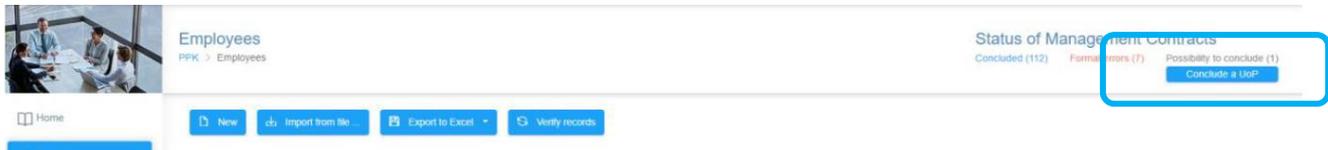
The conclusion of a PPK conduct agreement obligates the employer to begin making PPK contributions.

A few days before we plan to conclude a conduct agreement, we can prepare a list of employees in accordance with the above instructions, and on the day we want to conclude the agreement, click only „*Conclude a UoP*".

It results in the enrollment of employees in PPK, and a PPK conduct agreement is sent to the administrators' email addresses

If you have any questions, please send a message to **fundusze.ppk@allianz.pl**