

EDM User Guide – Manual Entry

You can upload data two ways, by individual member using the manual entry forms or by uploading a bulk file of multiple member records.

The home screen shows you your options.

Upload Employer Data

Upload Data

Type of Form	Manual Entry	Bulk Upload
Starter		
Leaver		
Annual Return		
Service Change		
Misc Update		
Amendment		

Download CSV Template

Starter
 Leaver
 Annual Return
 Service Change
 Misc Update
 Amendment

To enter a single member's details click on the 'Manual Entry' icon for the type of form you require.

The manual entry form is displayed as a single screen. Below is an example of an NHS annual return (the equivalent form for the teachers' scheme is very similar).

Data Entry Form: Annual Return

Superannuation Number
 Employment Number
 Pay Reference Number
 Date of Birth
 Surname
 Forename
 Middle Name Initials


Start Date or Start of Financial Year
 Type of Employment (Group Code)
 Employee Contribution Rate
 Service
 Type of Service
 Full Time Days
 Pay
 Employers Pensionable Pay
 Employers Pensionable Pay

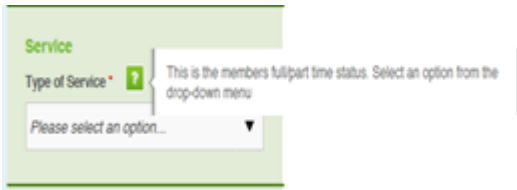
Member Contributions
 Employees Pension Contributions
 Employees Pension Contributions
 Arrears of Contributions
 Additional Percentage Contributions
 Additional Pension Contributions
 Salary Rate at 31 March
 State Scheme Earnings (whole £ only)
 Domiciliary Fees

Notes

Submit Submit and return to Home Cancel

The fields marked with a red asterisk are mandatory so must be completed in all cases. The other fields may not be required therefore are not mandatory.

The question mark inside green box icon  gives you information about what each field is and how you should enter the data. Hover over the box with your cursor to see this information.

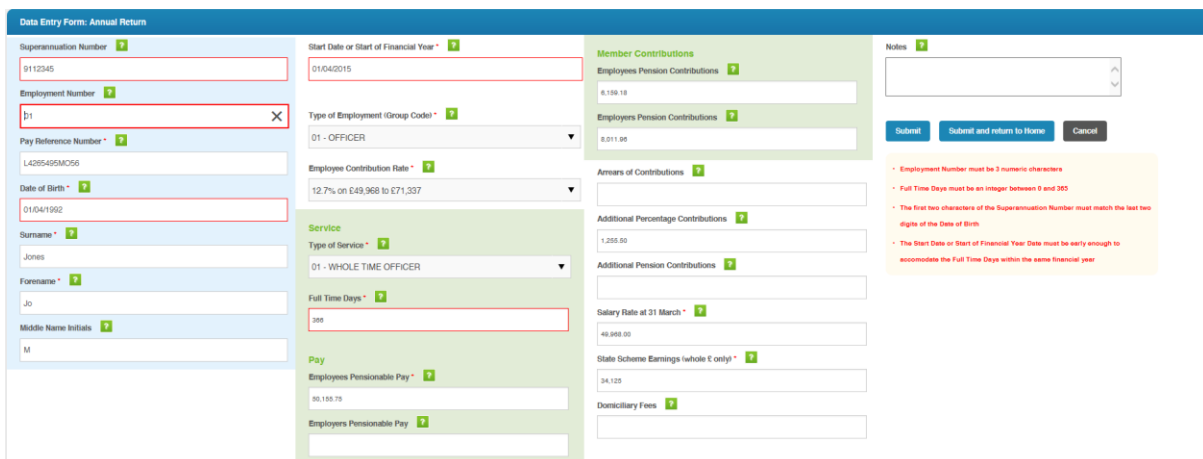


Once you have completed the form, press 'Submit'. If the data is correct the data on the form will clear and you will see the following message:



The record has been added to the database.

If, however, there are any errors in the data you are trying to submit, error messages will be displayed:



The image is a screenshot of the 'Data Entry Form: Annual Return'. It contains several sections:

- Superannuation Number:** 9112345
- Employment Number:** 1 (highlighted in red)
- Pay Reference Number:** L4295495M056
- Date of Birth:** 01/04/1992
- Surname:** Jones
- Forename:** Jo
- Middle Name Initials:** M
- Start Date or Start of Financial Year:** 01/04/2015
- Type of Employment (Group Code):** 01 - OFFICER
- Employee Contribution Rate:** 12.7% on £49,968 to £71,337
- Service Type of Service:** 01 - WHOLE TIME OFFICER
- Full Time Days:** 300
- Pay Employees Pensionable Pay:** 60,150.75
- Employers Pensionable Pay:** (empty)
- Member Contributions:**
 - Employees Pension Contributions: 4,150.18
 - Employers Pension Contributions: 8,011.05
- Arrears of Contributions:** (empty)
- Additional Percentage Contributions:** 1,255.00
- Additional Pension Contributions:** (empty)
- Salary Rate at 31 March:** 40,969.00
- State Scheme Earnings (whole £ only):** 34,125
- Domestic Fees:** (empty)

 On the right side, there is a 'Notes' field and a list of error messages:

- Employment Number must be 3 numeric characters
- Full Time Days must be an integer between 0 and 365
- The first two characters of the Superannuation Number must match the last two digits of the Date of Birth
- The Start Date or Start of Financial Year Date must be early enough to accommodate the Full Time Days within the same financial year

The incorrect data fields are outlined in red and a further explanation is printed in red on the right hand side of the screen.

Once you have corrected the highlighted errors, simply submit again.

The EDM system won't upload the record until all the errors have been corrected however if you do choose to click on submit after each error has been corrected the relevant red box and warning will disappear..

If you use the manual entry form you wont be able to see what you have submitted but if you attempt to submit a duplicate entry the portal will display an error message letting you know the data has already been submitted.

This error message will only appear if you submit exactly the same data so if you make a mistake on a submission please re-submit with the correct data and SPPA will delete the first submission before loading to Altair.

If you are having difficulty uploading your files please contact the EDM team using the 'Contact Us' function or telephone on 01896 893000 and ask for 'EDM'. You can also email SPPAEDM-Enquiry@gov.scot.