

Guide for Employers:

Setting Up Employees on the Sovereign Upload Portal & Connecting to EasyPay

What this guide covers:

- Register your organisation on the **Sovereign Upload Portal**
- Add and onboard pension scheme members
- Connect your payroll system using **EasyPay** (if applicable)
- Submit monthly pension contribution files automatically

Support contacts:

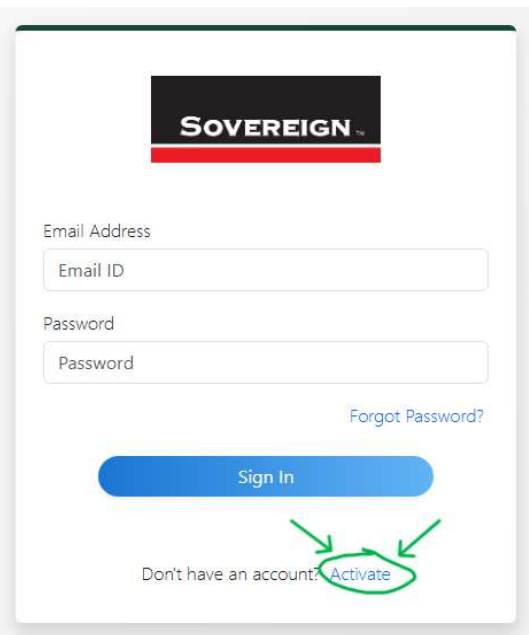
- Sovereign: localpensions@SovereignGroup.com
- EasyPay: cs@rockit.gi

Step 1: Activate Your Account

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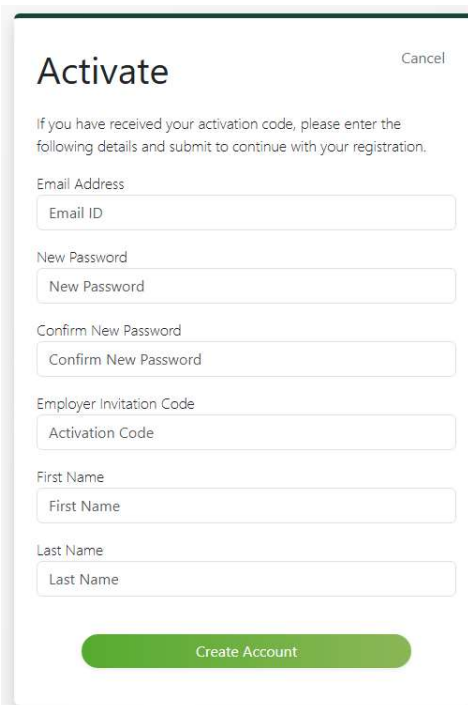
A) You will receive an email from Sovereign containing your **activation code**, your **scheme reference number**, link to the Sovereign Upload Portal.

B) Go to the Sovereign Upload Portal (<https://sovereignpension.com>) and click 'Activate'.



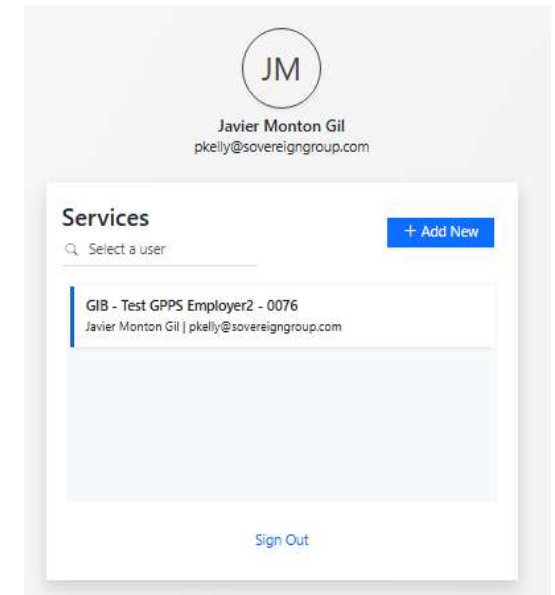
The image shows the Sovereign Upload Portal login page. At the top is the Sovereign logo. Below it are two input fields: 'Email Address' (containing 'Email ID') and 'Password' (containing 'Password'). To the right of the password field is a link 'Forgot Password?'. Below the fields is a blue 'Sign In' button. At the bottom, there is a link 'Don't have an account? Activate'. The 'Activate' link is circled in green with two green arrows pointing to it from the left.

C) Enter your organisation details and activation code.



The image shows the 'Activate' page on the Sovereign Upload Portal. At the top right is a 'Cancel' link. Below the title 'Activate' is a message: 'If you have received your activation code, please enter the following details and submit to continue with your registration.' There are five input fields: 'Email Address' (containing 'Email ID'), 'New Password' (containing 'New Password'), 'Confirm New Password' (containing 'Confirm New Password'), 'Employer Invitation Code' (containing 'Activation Code'), and 'First Name' (containing 'First Name'). Below these is a 'Last Name' field (containing 'Last Name'). At the bottom is a green 'Create Account' button.

D) Your scheme will then appear on your dashboard.

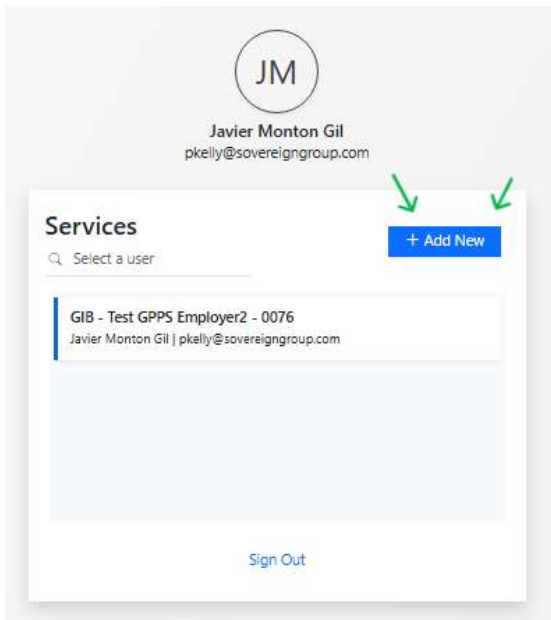


The image shows the dashboard of the Sovereign Upload Portal. At the top is a circular profile picture with the initials 'JM'. Below it is the name 'Javier Monton Gil' and the email 'pkelly@sovereigngroup.com'. Below this is a 'Services' section with a search bar 'Select a user' and a blue '+ Add New' button. Below the search bar is a list of services, with the first one being 'GIB - Test GPPS Employer2 - 0076' by 'Javier Monton Gil | pkelly@sovereigngroup.com'. At the bottom right is a 'Sign Out' link.

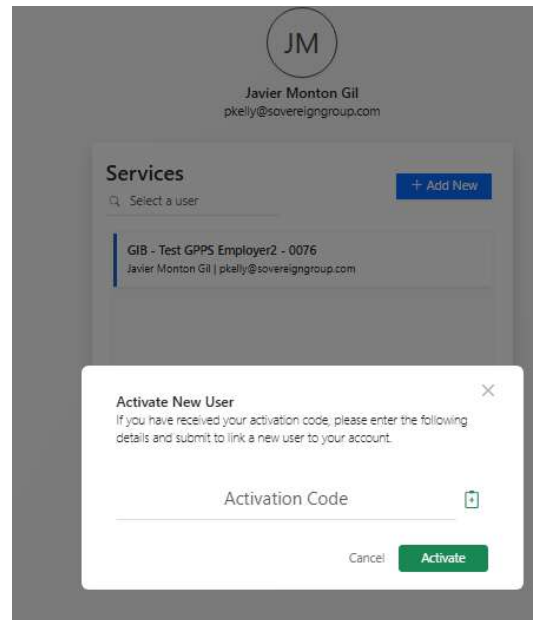
(Optional: Adding Additional Schemes)

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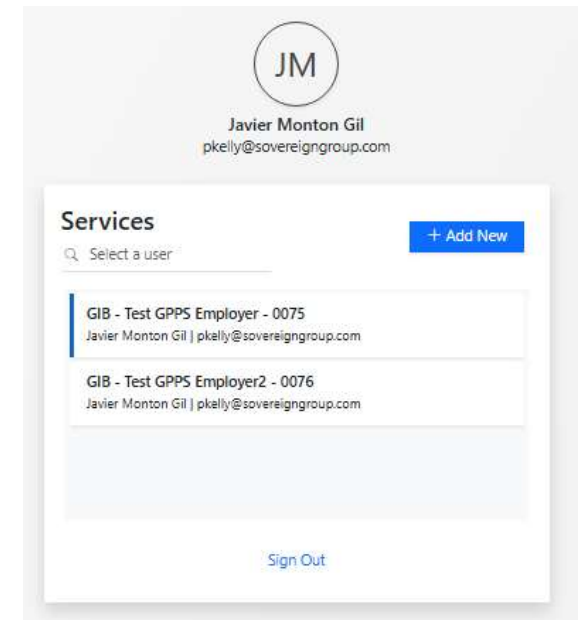
A) To add another pension scheme click “**Add New**”:



3) Enter the activation code for the additional scheme:



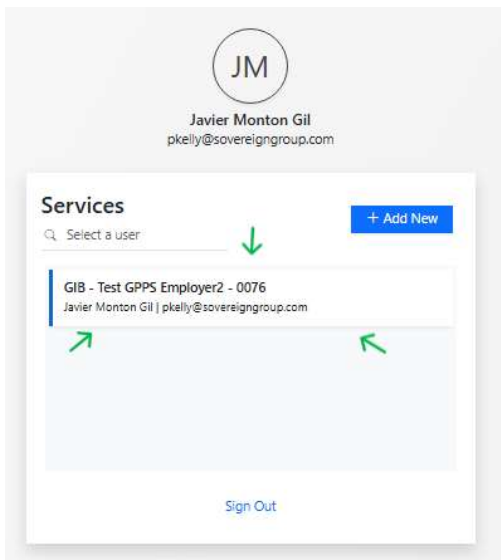
C) Once added, the new scheme will appear on your dashboard:



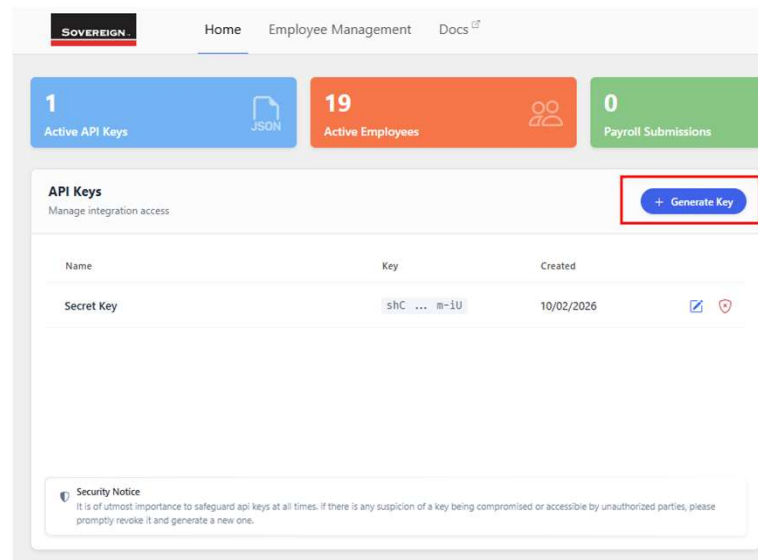
Step 2: Generate Your API Key

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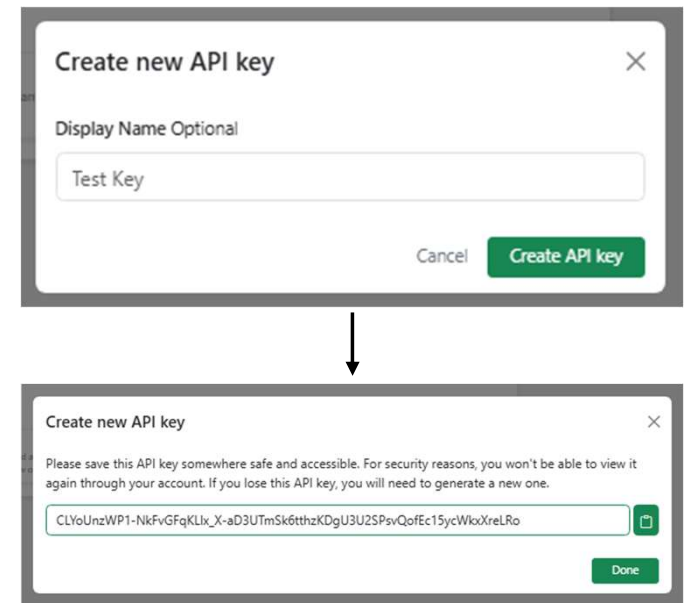
A) Click on the scheme tab to go to the Sovereign Upload Portal homepage:



B) Go to the 'Home' tab and click 'Generate Key':



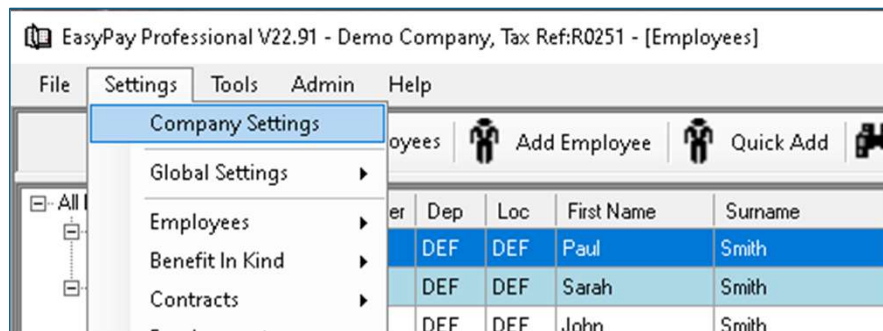
C) Copy the Key for later use:



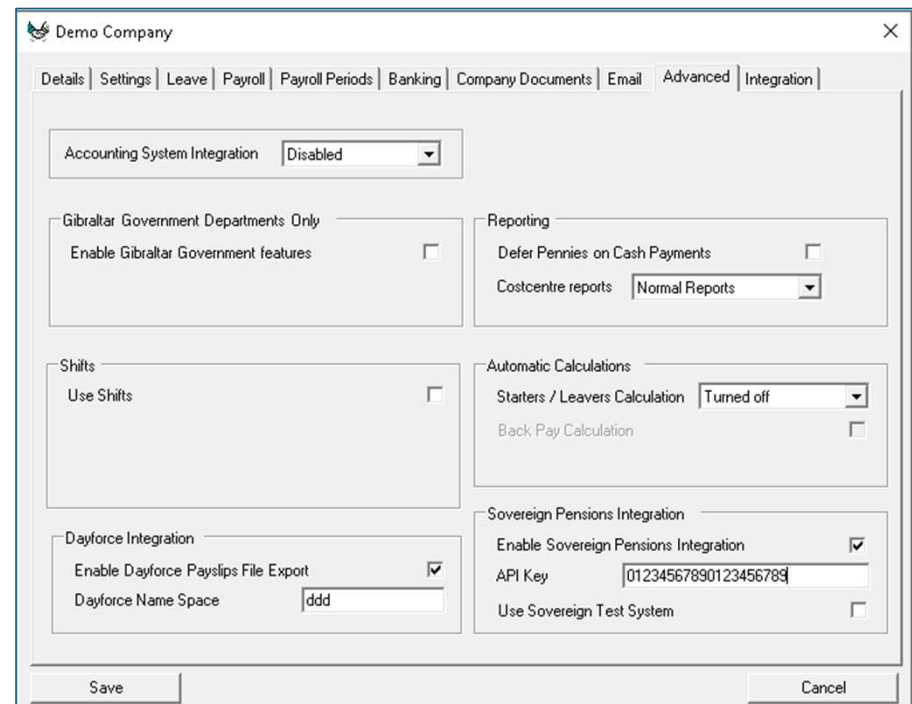
Step 3: Enter Your API Key in EasyPay

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A) Log into EasyPay and go to: **Settings** → **Company Settings**



B) Go to the **Advanced** tab. Tick **Enable Sovereign Pensions Integration**, paste your API Key, and click **Save**.

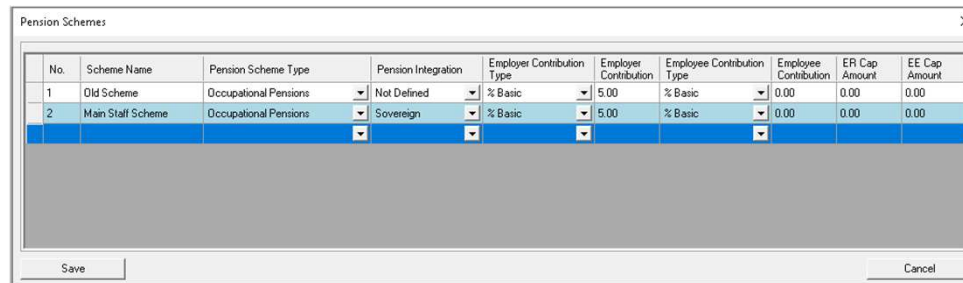


Step 4: Set up Sovereign Pension Scheme in EasyPay

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A) Go to: **Settings → Employees → Pension Schemes**

Check the list to ensure the new Sovereign Pension Scheme is listed.



No.	Scheme Name	Pension Scheme Type	Pension Integration	Employer Contribution Type	Employer Contribution	Employee Contribution Type	Employee Contribution	ER Cap Amount	EE Cap Amount
1	Old Scheme	Occupational Pensions	Not Defined	% Basic	5.00	% Basic	0.00	0.00	0.00
2	Main Staff Scheme	Occupational Pensions	Sovereign	% Basic	5.00	% Basic	0.00	0.00	0.00

B) If the scheme does not appear, add a record for the Sovereign Pensions Scheme.

Make sure to set the **Pension Integration** column to **Sovereign**.

Check that the default Employee and Employer contributions, match your default contributions for this scheme. You will be able to override these details for each employee if necessary.

Optional: If there is a cap on the employee or employer contributions, you will need to specify this too.

Step 4: Set up Sovereign Pension Scheme in EasyPay

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C) Ensure the following fields are fully completed for each employee:

- Full name, title
- Date of birth, gender
- Contract start date
- Personal email address
- Passport number
- Nationality
- Country of birth
- Home address

The screenshot displays the '9 - Smith, Paul' window in the EasyPay system. The 'Personal' tab is active, showing various fields for employee information. The 'Personal Details' section includes Birth Date (27/03/1992), Sex (Male), Marital Status (Unknown), Nationality (British), and Country Of Birth (Gibraltar). The 'Key Identity Details' section includes Gibraltar Resident (unchecked), Gib. ID Card (4353455435), Passport No. (45454554), Issued By (Gibraltar), and Dual Nationality (unchecked). The 'Personal Contact Details' section includes Address Line 1 (1 Southview Terraces), Address Line 2 (South Barrack Road), Address Line 3, Town / City (Gibraltar), Country (Gibraltar), Postcode (GX11 1AA), Telephone, Personal Mobile, and Personal Email (paul.smith@somewhere.com). The 'Additional Details' section includes Parent (unchecked), Number Of Children, Ethnic Origin (Not Set), Religion (Not Set), Smoker (unchecked), Disabled (unchecked), and Blood Type. The 'Worker Temporarily Working In Gibraltar' section includes Classified as Detached Worker (unchecked). The 'VISA and Work Permits' section includes VISA Required (unchecked), Permit Required (unchecked), and Permit Number. The bottom of the window has buttons for 'Save And Next (F4)', 'Save (F6)', 'Delete Employee (F9)', and 'Cancel (F7)'.

9 - Smith, Paul

Work Personal Contract Payroll Payment Details Recurring Transactions History Reports Pension Tasks Documents

Personal Details

Birth Date (34 years) 27/03/1992

Sex Male

Marital Status Unknown

Nationality British

Country Of Birth Gibraltar

Key Identity Details

Gibraltar Resident (Do not tick for Frontier Worker) ☐

Gib. ID Card 4353455435

Passport No. 45454554

Issued By Gibraltar

Dual Nationality ☐

Personal Contact Details

Address Line 1 1 Southview Terraces

Address Line 2 South Barrack Road

Address Line 3

Town / City Gibraltar

Country Gibraltar

Postcode GX11 1AA

Telephone

Personal Mobile

Personal Email paul.smith@somewhere.com

Additional Details

Parent ☐

Number Of Children

Ethnic Origin Not Set

Religion Not Set

Smoker ☐

Disabled ☐

Blood Type

Worker Temporarily Working In Gibraltar

Classified as Detached Worker ☐

VISA and Work Permits

VISA Required ☐ Expires 27/03/2026

Permit Required ☐ Expires 27/03/2026

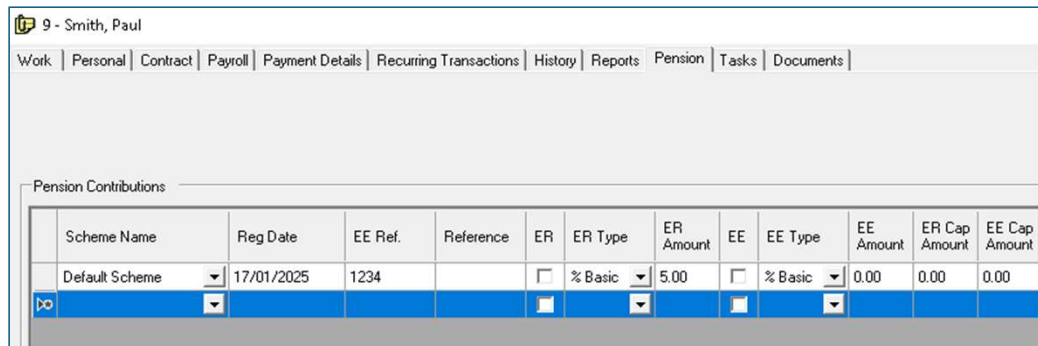
Permit Number

Save And Next (F4) Save (F6) Delete Employee (F9) < > Cancel (F7)

Step 4: Set up Sovereign Pension Scheme in EasyPay

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D) For each employee, open their employee record and check their **Pensions tab**:



Scheme Name	Reg Date	EE Ref.	Reference	ER	ER Type	ER Amount	EE	EE Type	EE Amount	ER Cap Amount	EE Cap Amount
Default Scheme	17/01/2025	1234		☐	% Basic	5.00	☐	% Basic	0.00	0.00	0.00
				☐			☐				

- Check that the Sovereign pension scheme has been added to the Pensions tab.
- Confirm the **registration date**. This must be a valid date when the employee joined the scheme.
- Check **EE Ref.** is correct for the employee. This is a unique reference that identifies the employee in the Sovereign pension scheme. It is in the format of 9 numbers. First three numbers are employer reference, followed by 6 numbers for employee's unique number.
- Amend their personal contribution details (if relevant)

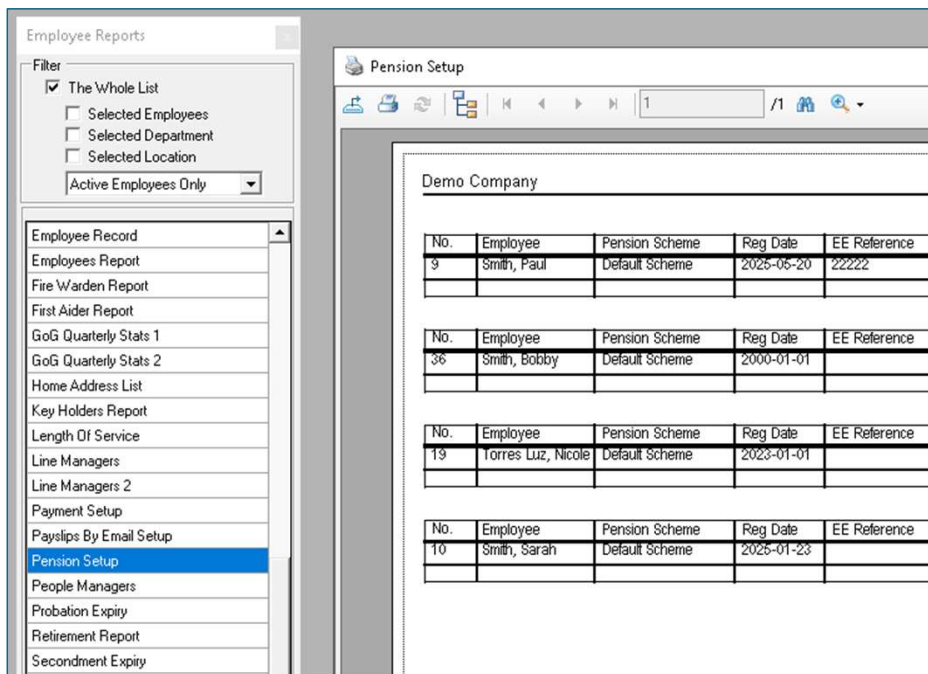
Note: These details apply to future payslips only. If you wish to amend earlier payslips, then you will need to go to previous payslips and amend it.

Step 5: Employee Setup Report and Onboarding

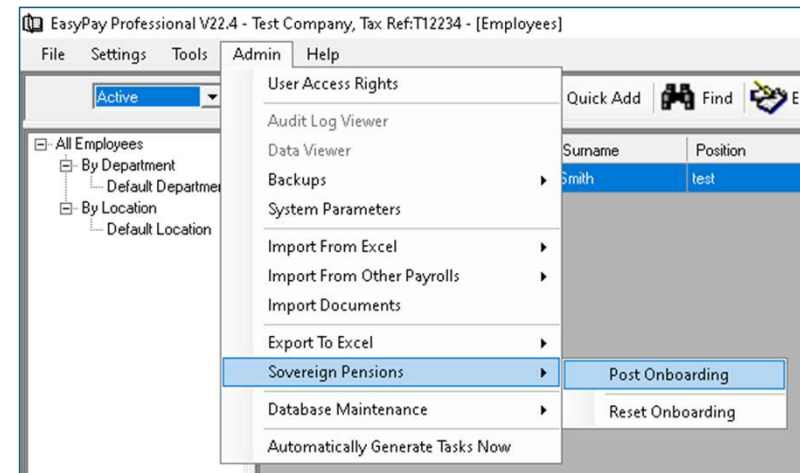
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A) Go to: **Employees → Employee Reports → Pension Setup**

B) Use this report to confirm all employees have been correctly configured for the pension scheme.



C) Go to: **Admin → Sovereign Pensions → Post Onboarding**



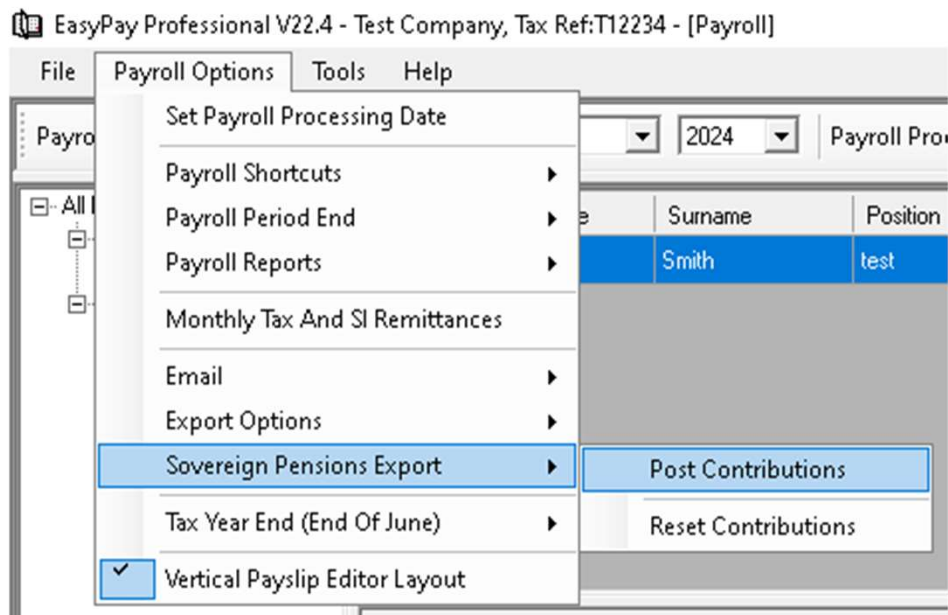
EasyPay will highlight any missing information that must be completed before onboarding can continue.

Once posted, employee data will be automatically transferred to the Sovereign Portal.

Step 6: Post Contributions From EasyPay

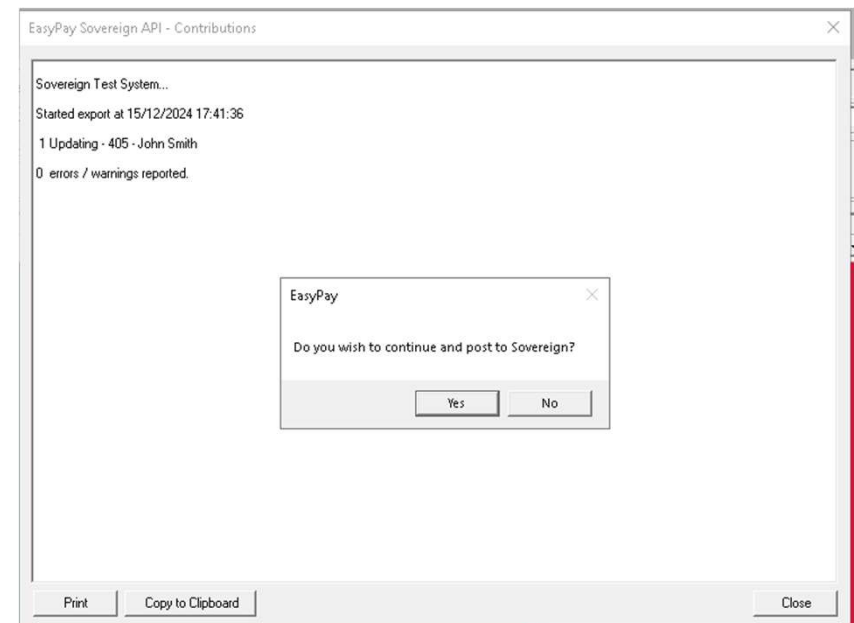
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A) After you have completed payroll and are ready to report your contributions for the period to Sovereign, go to: **Payroll Options → Sovereign Pensions Export → Post Contributions**



B) EasyPay will check for missing information. If valid, you will be asked to confirm the submission.

Select **Yes** to send contributions to the Sovereign Portal.

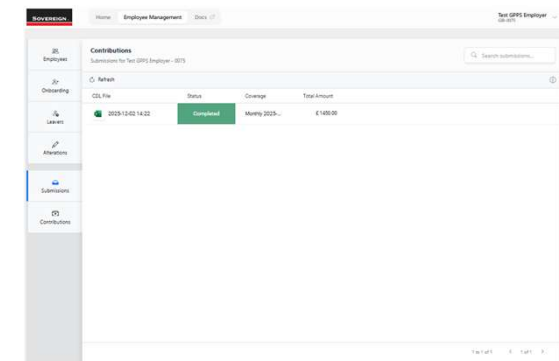
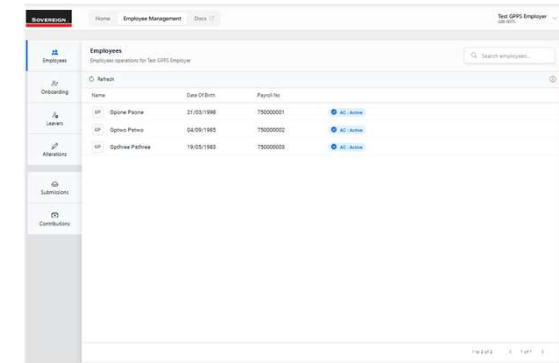
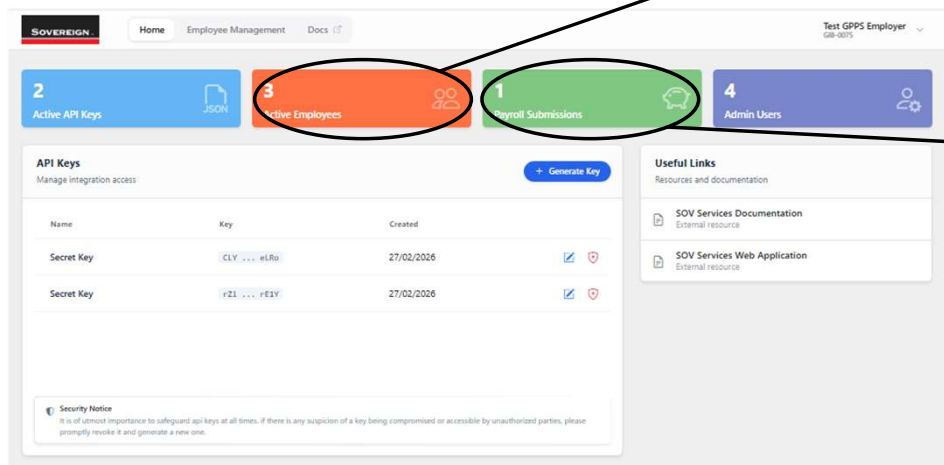


Step 7: View Submissions on Your Account

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A) To view onboarded employees in the Sovereign Upload Portal go to **'Active Employees'**.

B) To view contributions sent to the Sovereign Upload Portal go to **'Payroll Submissions'**.



Notes on Contribution Submissions:

EasyPay will not resend contributions that have already been submitted. If you need to resend a full period (e.g., after revising payslips), use: **Payroll Options → Reset Contributions For This Pay Period**