

PPK Serwis

Description of the platform
Version 5.38

June 2021



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1. Introduction

1.1 Context

PPK Serwis is an application intended for employers, who can use it themselves to manage the employees who are participants in Employee Capital Plans.

PPK Serwis can be used internally by the company or by dedicated external service providers engaged by the employers.

PPK Serwis is available via popular web browsers: Google Chrome, Mozilla FireFox or Microsoft Edge. The browsers should be updated as recommended by the providers.

1.2 Information architecture

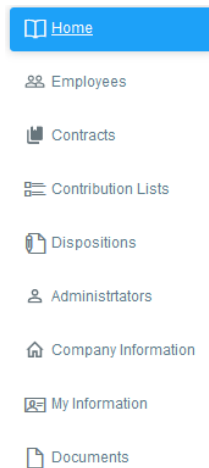
In terms of data availability, the website has been designed in accordance with the latest standards for information architecture and user experience (UX). Particular emphasis was put on the transparency of the website, so that even a novice user with minimal knowledge of Employee Capital Plans and investment funds can use it. Every process was designed in such a way that, at the initial stage, the user only has to provide the minimal amount of information about the action to be performed. This is designed to improve the users' confidence and encourage them to use the functions of the website.

In order for the website to be as transparent as possible, without any deeply embedded pages that may be difficult to reach, every page has been split into the following three parts:

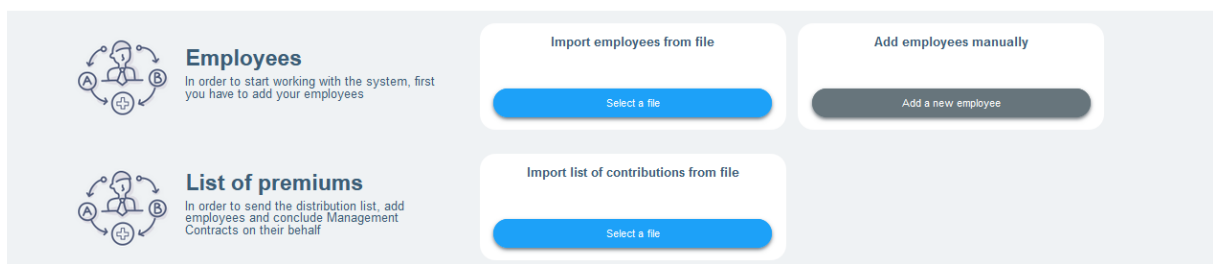
- **Header** – the top part of every page of the website containing information about the logged-in user, the name of the currently selected employer whose employees are managed user and the logout option.

This is where the user of the website can switch between the different companies whose Employee Capital Plans are to be managed.

- **Navigation** – the side bar on the left side of the website, used for easy navigation between the pages.



- **Informational part** – the main part of every page, containing the dominant block of information.



- **Footer** – bottom part of each page, again consisting of the elements of the menu, frequently asked questions and contact details of the helpdesk that provides support to the users.

2. Access to PPK Serwis

2.1 Registration

Registration on the website takes place when the employer's administrators are specified upon conclusion of the management agreement. E-mails with customised links to the PPK Serwis login page are automatically sent to the persons indicated by the employer after the agreement is signed. The link has no expiry date, and it can be used at any time.

After the administrator clicks "activate account" ["aktywuj konto"], a message will appear to indicate that the account activation instructions – customised link – have been sent to the relevant e-mail address.

The customised link leads to the page where the employer's administrator can request access to the website. The administrator will receive a second link, with a 24-h expiry period, to set the password.

The password should consist of 8 characters, including 1 special character, 1 uppercase letter and 1 digit. The email addresses provided at registration should be personal email addresses, separate for each administrator.

The login to the account is the submitted e-mail address of the employer's administrator.

The password is valid for the following 30 days.

If the deadline for changing the password is approaching, after logging in to the application, the system forces the administrator to change the password itself. If the password expires, the Employer's administrator will receive information about incorrect login data when logging in. In this case, he will be able to use the password recovery option via the link on the login page "**Forgot password**".

The defined password should be accordingly protected, and it cannot be disclosed to third parties. **Protection of the password is a responsibility of the user.**

A single administrator can manage multiple entities.

If a single administrator manages more than one employer, the application can be used to

group the entities under a single login so that the administrator logged in to PPK Serwis can switch between different companies without having to log out and log in again with a different login. In order to use this function, the administrator of the employer needs to be reported with the same login (e-mail address) for each management agreement to be managed by the administrator in the future.

2.2 Basic login process and password recovery

Logging in to the website takes place correctly with the login and password assigned to the user's e-mail address. **Access to the website will be locked and the account deactivated if a wrong password is entered 6 times.** To reactivate your account, please contact the hotline at pomoc-ppk@psfinteco.pl or call **22 355 46 66**. To recover the password, the user should set a new password using the **"Forgot password?"** option. In case of account deactivation, the administrator is not able to recover the password.

Select the "I forgot my password" if you forgot your password. The application will ask you to enter the login which is the administrator's e-mail address registered in the contact system.

After verifying that the indicated e-mail address is in the system as assigned to the administrator, the system sends an e-mail with a link to reset the password. After entering the link, the administrator will be redirected to the password reset page. After resetting the password, the administrator will be redirected to the login page.

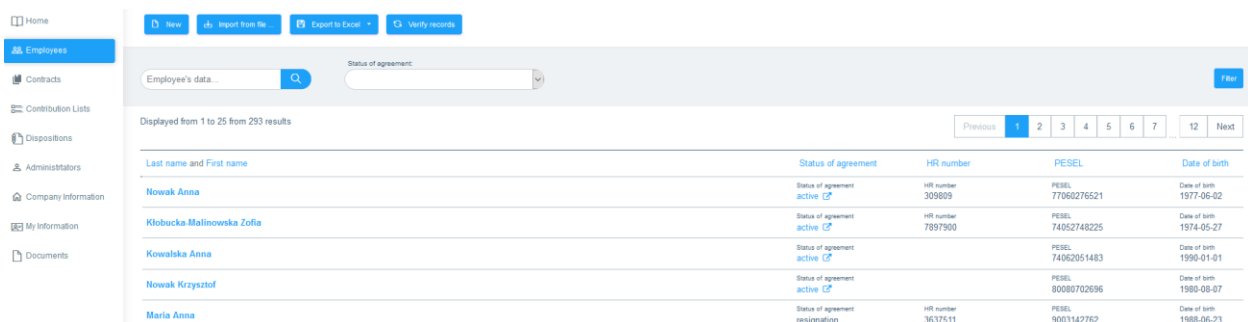
In the case of multiple attempts at sending an email for password recovery, the system will display the following message after the 10th attempt: "You have used the maximum number of password recovery attempts. Please try again in one hour." and block the possibility to send another email for one hour. After one hour, it will be again possible to make an attempt at recovering the password.

3. Employer Panel

The PPK Serwis application consists of several sections that enable full management and accounting for participants in Employee Capital Plans. Each section has a simple and transparent layout to make navigation and work with the application much easier.

4. Employees

The “**Employees**” [“Pracownicy”] section is one of the two most important parts of the system. Using this section, the administrator can add employees to the Employee Capital Plan programme and manage their data and submitted applications. This is the section used for most of the activities related to the service of Employee Capital Plan Participants before creating a management agreement. In the case of Employees for whom management agreements have been created, changes introduced in the “Employees” section do not result in amendments to the agreement. Agreements should be amended by way of instructions.



Last name and First name	Status of agreement	HR number	PESEL	Date of birth
Nowak Anna	Status of agreement active CP	HR number 309889	PESEL 77060276521	Date of birth 1977-06-02
Klobucka-Malinowska Zofia	Status of agreement active CP	HR number 7997900	PESEL 74052748225	Date of birth 1974-05-27
Kowalska Anna	Status of agreement active CP		PESEL 74052051483	Date of birth 1990-01-01
Nowak Krzysztof	Status of agreement active CP		PESEL 80050702696	Date of birth 1980-08-07
Maria Anna	Status of agreement resignation	HR number 3637511	PESEL 9003142762	Date of birth 1988-06-23

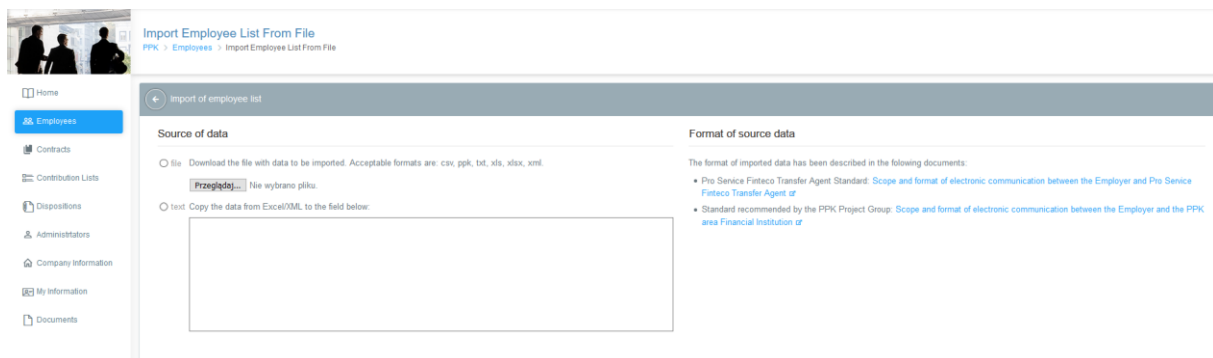
4.1 List of employees (Import from file [“Importuj z pliku”] section)

In order to submit a list of Employees, the Employer should prepare a suitable file which enables import of the Employee data into the system. The application is designed to import files conforming to the guidelines prepared by the Working Group of the Polish Development Fund (PFR) (cooperation of Financial Institutions, providers of ERP software and Transfer Agents).

The application supports the following files: xml, xlsx, xls, csv, txt and ppk.

File formats may change with time due to technical or legal reasons.

The current file specification can be found in the bottom right part of the Employee list import screen.



The system also permits copying cells from an Excel spreadsheet or xml file. Similarly to file import, in order for the process to be successful, the copied data should meet the requirements defined in the document titled “Scope and form of electronic communication between the Employer and the financial institution regarding Employee Capital Plans” [“Zakres i format komunikacji elektronicznej pomiędzy Pracodawcą i instytucją finansową w obszarze PPK”].

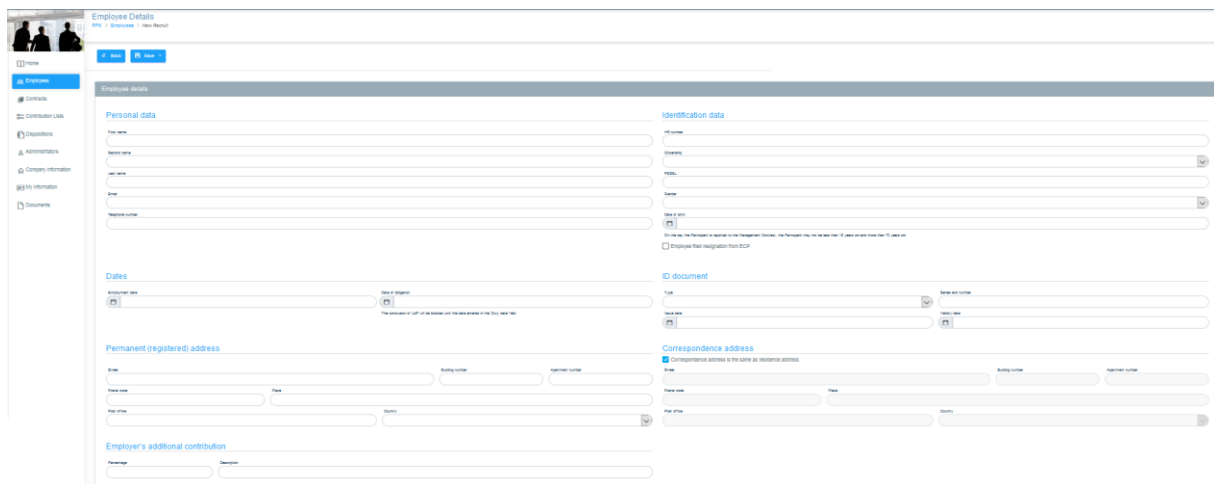
Detailed information on which fields in the files imported to the PPK Serwis system are required and on the acceptable length of entries is provided in the ProService Finteco Standard specification, attached in the PPK Serwis system.

4.2 Employee data

(New [“Nowy”] section)

4.2.1 File handling – data import

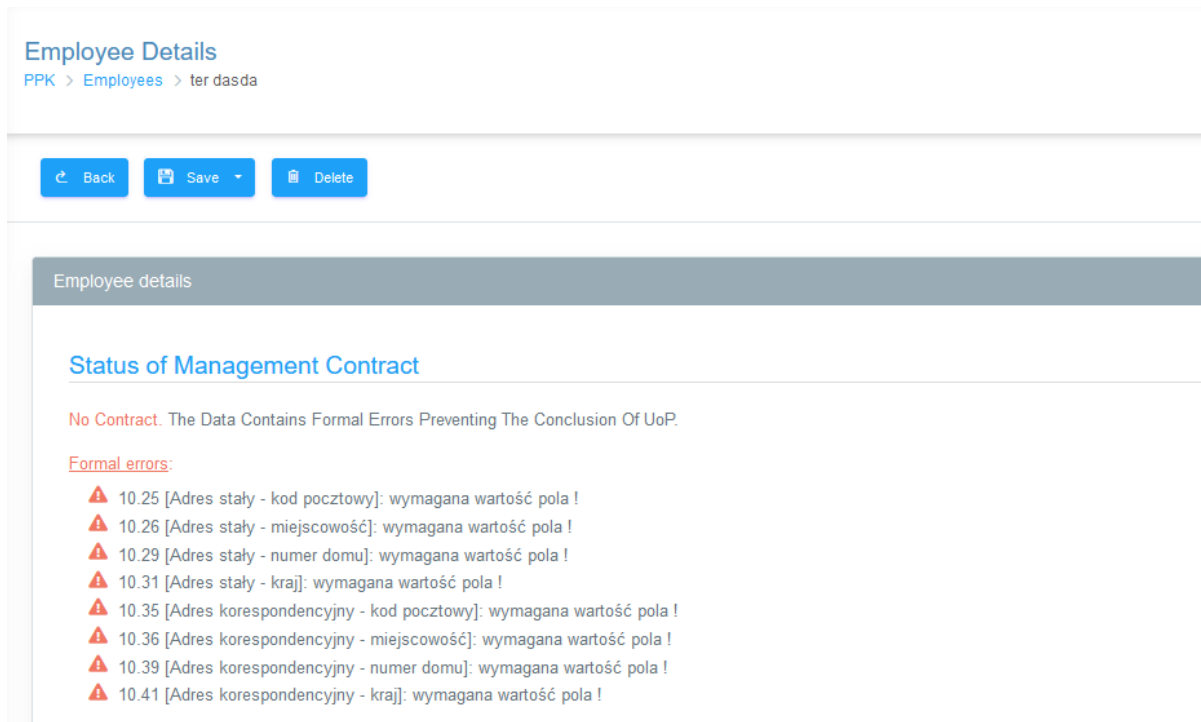
The data entered in the system are verified in order to check if they include all the data required to correctly create the management agreement and account for future contributions. A list will be created in the system, indicating each Employee and the status of their management agreement.



Status of the agreement	Explanation
Brak, błędy formalne / None, formal errors	application for management agreement was not sent because data are missing in the given data set, which prevents management agreement creation
Brak / None	application for management agreement was not sent
W realizacji / Pending	application for management agreement was sent to create agreement
Aktywna / Active	management agreement is created

Formal errors may be caused by failure to fill out all mandatory fields required to create the management agreement or by errors in the format of the data in the individual fields.

By clicking the data set in the List of Employees with the “None, formal errors” [“Brak, błędy formalne”] status, the Administrator can see a detailed description of the errors in the data set in the top part of the screen:



Employee Details
 PPK > Employees > ter dasda

Back Save Delete

Employee details

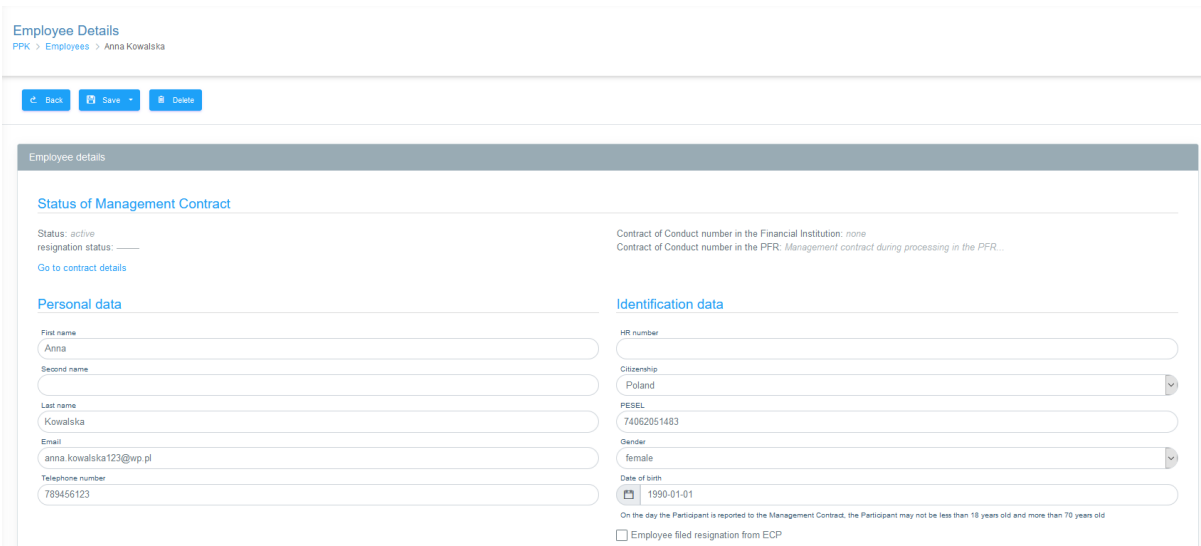
Status of Management Contract

No Contract. The Data Contains Formal Errors Preventing The Conclusion Of UoP.

Formal errors:

- ⚠ 10.25 [Adres stały - kod pocztowy]: wymagana wartość pola !
- ⚠ 10.26 [Adres stały - miejscowość]: wymagana wartość pola !
- ⚠ 10.29 [Adres stały - numer domu]: wymagana wartość pola !
- ⚠ 10.31 [Adres stały - kraj]: wymagana wartość pola !
- ⚠ 10.35 [Adres korespondencyjny - kod pocztowy]: wymagana wartość pola !
- ⚠ 10.36 [Adres korespondencyjny - miejscowość]: wymagana wartość pola !
- ⚠ 10.39 [Adres korespondencyjny - numer domu]: wymagana wartość pola !
- ⚠ 10.41 [Adres korespondencyjny - kraj]: wymagana wartość pola !

In the lower part of the screen, the User can view or correct the data or add any data that are missing.



Employee Details
 PPK > Employees > Anna Kowalska

Back Save Delete

Employee details

Status of Management Contract

Status: active
 resignation status: —
[Go to contract details](#)

Contract of Conduct number in the Financial Institution: none
 Contract of Conduct number in the PFR: Management contract during processing in the PFR...

Personal data

First name: Anna
 Second name:
 Last name: Kowalska
 Email: anna.kowalska123@wp.pl
 Telephone number: 789456123

Identification data

HR number:
 Citizenship: Poland
 PESEL: 74062051483
 Gender: female
 Date of birth: 1990-01-01

Employee filed resignation from ECP

NOTE: Since the data imported to PPK Serwis are a file generated from the payroll system, it

is possible to eliminate the error in PPK Serwis (as described above), but we recommend making the correction directly in the payroll system, i.e. the source of the file.

Re-importing the corrected file will overwrite the latest data – the application identifies the “personal identity number” [“per PESEL”] / “date of birth + identity document number” [“per data urodzenia + nr dokumentu tożsamości”], and it merges the data in the system with the new data.

NOTE: file overwriting will not result in deletion of the data sets that are not included in the imported file. The data are only overwritten “positively”. Overwriting the files in the system will not change the data for active management agreements concluded in the past – this function is only used to correct the data and Employees at the time of conclusion of the management agreement. For Employees who are already participants in Employee Capital Plans, the data saved in the management agreement can be changed using a different process.

SPECIAL ERROR TYPE: Age verification of a Participant over 55.

An important feature of PPK Serwis is the possibility of verifying if the added Employees qualify for participation in terms of age. The system verifies the Employee’s age using the PESEL number (or date of birth, if there is no PESEL number), and for Employees whose age is between 55 and 70, the status of the agreement will be shown as “None, formal errors” [“Brak, błędy formalne”].

In order to sign the agreement, the system will require checking the flag to indicate that the Employee has submitted the declaration on joining the Employee Capital Plan.

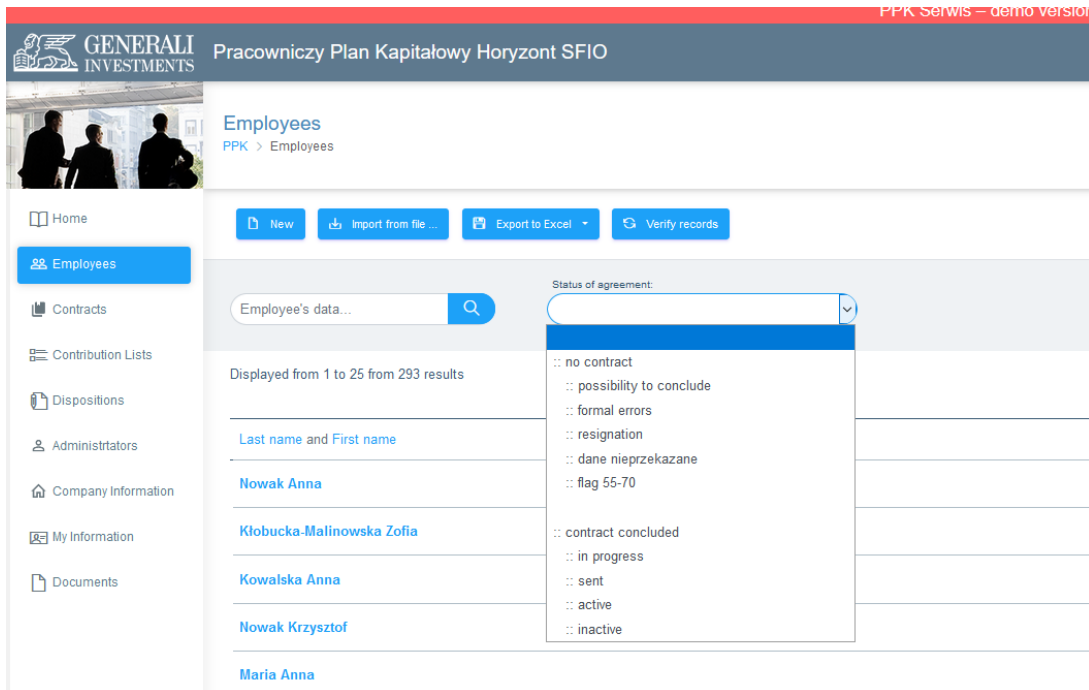
Presently, the submission of the declaration on joining the Employee Capital Plan by Employees aged 55–70 has to be checked separately for every Employee.

4.2.2 Functions that make viewing and correcting the imported data easier

To make viewing and correcting the imported data easier, the system offers the following additional functions:

a) Agreement status filters

The application limits the records shown to the list of records falling into the following categories:



b) Search

By entering one of the following parameters, the user can isolate the requested record on the list: last name, personal identify number, date of birth, payroll ID



Both the complete and filtered/limited list of employees, as necessary, can be exported in the form of a csv or xls file. This function can be used to:

- a) Report faulty records that have to be corrected in the payroll system,
- b) Generate a list of new applications (in a given month) for conclusion of the management agreement,
- c) Generate a list of active/inactive management agreements.

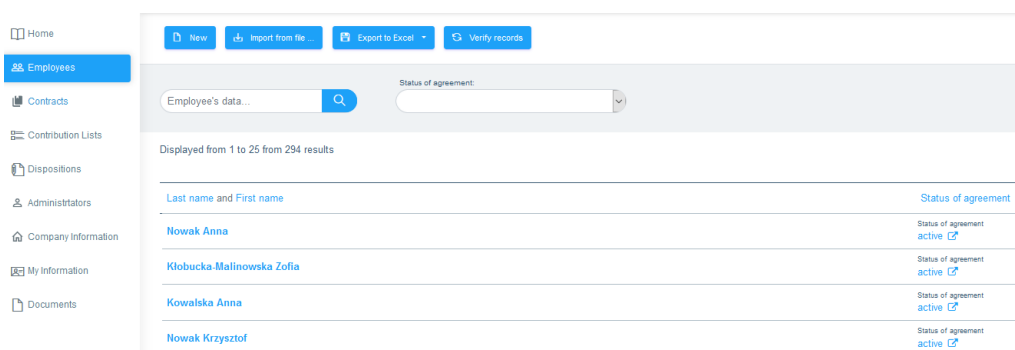
Importing a list of Employees and correcting (where required) the data in the reported faulty data sets is not equivalent to concluding the management agreement.

4.2.3 Concluding the management agreement

Irreversible transmission of the data from the files imported into the PPK Serwis application and, consequently, conclusion of the management agreement can be performed using the “Conclude the management agreement” [“Zawrzyj UoP”] command.

Management agreements can be signed individually for a specific employee or collectively.

- a) If the agreement is concluded individually, the “Conclude the management agreement” button will appear next to the first name and last name of the Employee on the list of Employees:



The screenshot shows the 'Employees' page in the PPK Serwis application. It features a search bar for 'Employee's data...' and a dropdown menu for 'Status of agreement'. Below the filters, it indicates 'Displayed from 1 to 25 from 294 results'. A table lists employees with their names and the status of their management agreements.

Last name and First name	Status of agreement
Nowak Anna	Status of agreement active 🔗
Klobucka-Malinowska Zofia	Status of agreement active 🔗
Kowalska Anna	Status of agreement active 🔗
Nowak Krzysztof	Status of agreement active 🔗

- b) Management agreements for a large group of Employees can be concluded using the

button located in the top right corner of the screen with the list of Employees:

Status of Management Contracts

Concluded (290)

Formal errors (1)

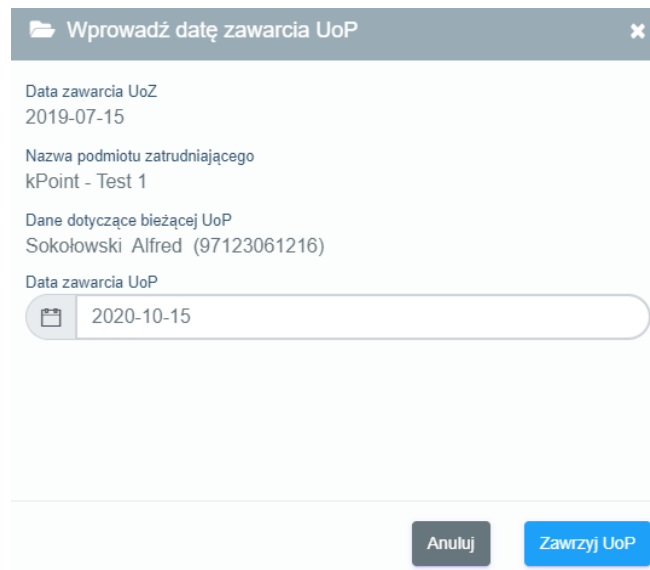
Possibility to conclude (0)

The import of data from the file into PPK Serwis **does not oblige the user to conclude the management agreement on the day of file import**. It is possible to import the list of Employees and correct any data (where necessary) in advance and simply click the “Conclude the management agreement” button on the planned date of conclusion of the management agreement after logging in to the application.

It is also possible to use an alternative mechanism, activated via the parameter on the PPK Serwis instance. The conclusion itself of the management agreement is still performed as a result of clicking the “Conclude the management agreement” button, and on the moment of clicking an additional window will appear, which makes it possible to define the date of conclusion of the management agreement (see below). The application will verify for the entered date:

- whether the date of concluding the management agreement has been introduced
- whether the entered date is not from the future
- whether the entered date is not earlier than the date of concluding the administration agreement

If the date of agreement conclusion is not found while transmitting the data to the central system, the application will place the date of clicking the “Conclude the management agreement” button as the date of agreement conclusion.



Wprowadź datę zawarcia UoP

Data zawarcia UoZ
2019-07-15

Nazwa podmiotu zatrudniającego
kPoint - Test 1

Dane dotyczące bieżącej UoP
Sokołowski Alfred (97123061216)

Data zawarcia UoP
2020-10-15

Anuluj Zawrzyj UoP

The final confirmation of successful conclusion of the management agreement is the change in the agreement status in the list of Employees from “Pending” to “Active” (the status is usually updated within 24 h from the transmission of the data), and appearance of a new item or items in the “Agreements” [“Umowy”] section. The date of conclusion of the management agreement is the date of transmission of the data (clicking the “Conclude the management agreement” button).

NOTE: As mentioned before, overwriting the next file with the list of Participants will not result in deletion of any data sets from the system that are not included in the imported file.

In practice, this means that if the Employee delivers a declaration opting-out from making contributions to the HR department (the Act does not specify any time limit for such a declaration) between the time of import of the Employees by the User and the time of conclusion of the management agreement, it will be necessary to manually delete such a data set from the imported list of Employees – the previously imported data set waiting for the conclusion of a management agreement will not be deleted by entering the information about the opt-out only in the payroll system, generating a file from the payroll system without the Employee opting out and importing such an updated file into PPK Serwis.

The data set for a specific Employee has to be opened in order to be deleted (the already described “Search” [“Wyszukaj”] function can be used to find the data set to be deleted).

Employee Details

PPK > Employees > Anna Nowak

← Back
Save
Delete

Employee details

Status of Management Contract

Status: *active*
 resignation status: ———

[Go to contract details](#)

Personal data

4.2.4 Concluding of canceled the management agreement

If the management agreement has been canceled due to an incorrect (too early) application of an employee, it is possible to report them again without having to complete the employee's data from the beginning. This operation can be done from two places:

a) from the level of the list of employees :

Nazwisko i Imię	Status umowy
Test Test	<div style="display: flex; align-items: center;"> <div style="border: 2px solid red; padding: 2px 5px; margin-right: 5px;">Zgłoś ponownie UoP</div> <div style="font-size: small;"> Status umowy anulowana ↗ </div> </div>

b) from the level of employee details:

Szczegóły pracownika

Status Umowy o Prowadzenie

Status umowy
anulowana

Przejdź do szczegółów umowy [↗](#) Zgłoś ponownie UoP

Dane osobowe

Imię

Drugie imię

Before sending the management agreement again, the system will verify again whether all the required data are completed and, if necessary, report the information about the deficiencies.

5. Agreements

A record will be created in the “Agreements” section after the status of the management agreement for the employee is changed to “active”. The section contains the current list of the persons who have signed the management agreement.

Contracts of Conduct
PPK > Contracts

test Status of agreement: Conclusion date from: to:

Displayed from 26 to 29 from 29 results

Last name and First name	Status of agreement ^	Conclusion date	HR number	PESEL	Date of birth	Actions
Test 03 Test 03	Status of agreement active	Conclusion date --	HR number 923	PESEL 75052810451	Date of birth 1975-05-28	<input type="button" value="Dispositions"/>
Testowy Adam	Status of agreement active	Conclusion date --		PESEL 75032800012	Date of birth 1975-03-28	<input type="button" value="Dispositions"/>
Test Adam	Status of agreement active	Conclusion date --		PESEL 84111952218	Date of birth 1984-11-19	<input type="button" value="Dispositions"/>
Testowy Drugi Adam	Status of agreement active	Conclusion date --		PESEL 86011037239	Date of birth 1986-01-10	<input type="button" value="Dispositions"/>

Displayed from 26 to 29 from 29 results

Differences between the “Employees” section and the “Agreements” section:

a) The number of people in the “Employees” section may differ from the number of

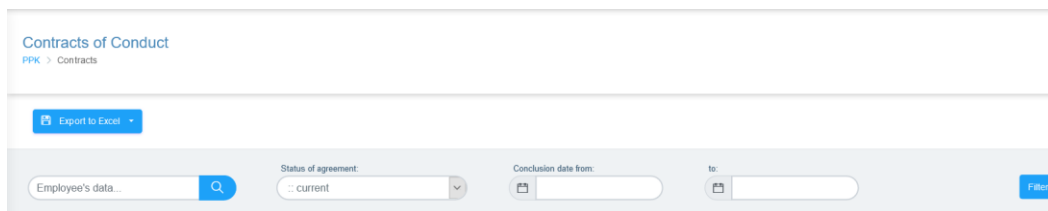
people in the “Agreements” section because the latter only includes agreements with the “active/inactive” status, whereas the “Employees” section also includes records for applications for the conclusion of a management agreement (including faulty records), records waiting to be transmitted to the Fund and records transmitted to the Fund and awaiting activation of the agreement.

- b) The data of the persons in the “Employees” section may be different from the data of the persons in the “Agreements” section because the latter only presents the current state of the participant’s data indicated in the management agreement. Importing a list of employees in the “Employees” section will not change the data of the participants in any management agreements already signed, and it is not the correct way of changing the data of a participant in the management agreement.

Based on the findings of the Working Group, changing the identification data and changing the contact information are two additional, separate processes managed through the files described in a document of the Working Group and in a ProService Finteco document or on the basis of a form in the “Agreements” tab. Both processes are described below.

- c) In the Contract section, the number of management agreement is displayed on the employee details assigned by the Transfer Agent as well as by the Polish Development Fund (PFR).
- d) The section also allows to download the report of concluded management agreement.

The data for the report can be filtered using the available parameters:



The screenshot shows a web interface titled "Contracts of Conduct" with a breadcrumb "PPK > Contracts". Below the title is a blue button labeled "Export to Excel". A search bar contains the text "Employee's data...". To the right of the search bar are three filter controls: "Status of agreement" with a dropdown menu showing "current", "Conclusion date from" with a date picker, and "to:" with another date picker. A blue "Filter" button is located at the bottom right of the filter area.

The report can be exported from the application in .xlsx or .csv format.

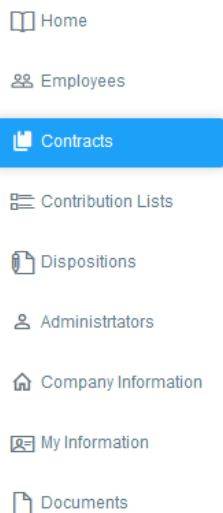
- e) A new category of data: “History” [“Historia”] will appear at the very bottom of the screen after entering the employee level. This section shows all historical changes of the agreement (e.g. change of the amount of additional/basic payment of the employee and other changes in the agreement).

History

Wed, 29 Jan 16:58 Contract active (demo).

6. Lists of contributions

In order to fulfil the obligation to submit the payments for and on behalf of the employees, the employer has to import a file with the list of contributions to the PPK Serwis system and transfer the funds to the acquisition account of the fund. Both conditions have to be met in order for the payment to be accounted for within the prescribed period.

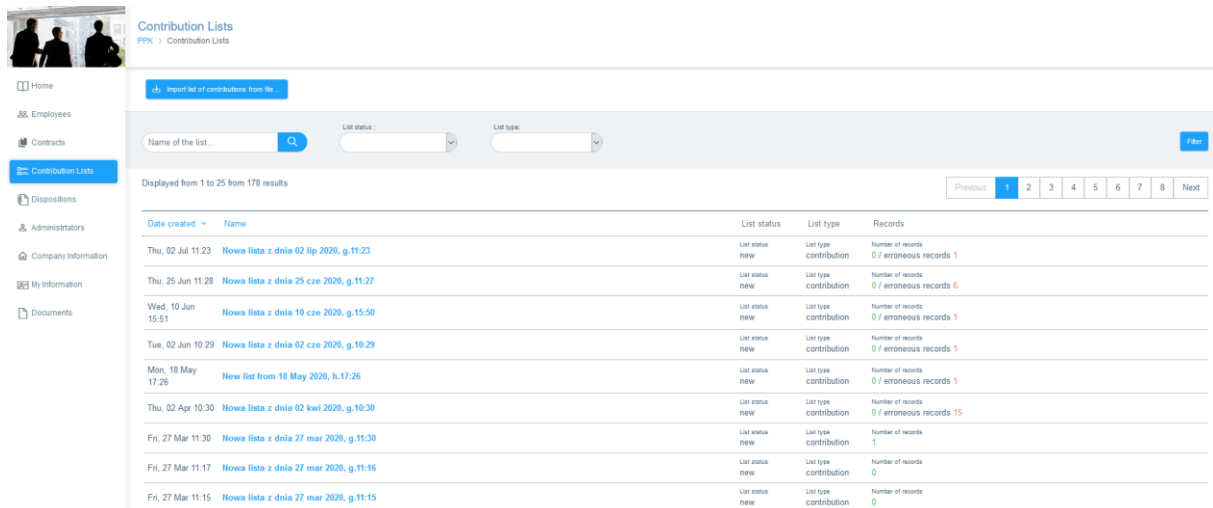


6.1 Importing the list of contributions

The format of the file with the list of contributions and corrections of the list of contributions has been developed by the Working Group of the Polish Development Fund. A file prepared in accordance with the guidelines of the Working Group should be imported into the PPK Serwis system. The application verifies the file to check if all fields are complete.

NOTE: One file may include data for only one month – the same for all participants. If a non-uniform period is detected in the file, the following message will appear: “All items in the list of contributions must be for the same contribution period. Verify the file and try again.”

The screen will be similar to the screen used to import the list of employees.



Date created	Name	List status	List type	Records
Thu, 02 Jul 11:23	Nowa lista z dnia 02 lip 2020, g:11:23	List status new	List type contribution	Number of records 0 / erroneous records 1
Thu, 25 Jun 11:28	Nowa lista z dnia 25 cze 2020, g:11:27	List status new	List type contribution	Number of records 0 / erroneous records 6
Wed, 10 Jun 15:51	Nowa lista z dnia 10 cze 2020, g:15:50	List status new	List type contribution	Number of records 0 / erroneous records 1
Tue, 02 Jun 10:29	Nowa lista z dnia 02 cze 2020, g:10:29	List status new	List type contribution	Number of records 0 / erroneous records 1
Mon, 18 May 17:26	New list from 18 May 2020, h:17:26	List status new	List type contribution	Number of records 0 / erroneous records 1
Thu, 02 Apr 10:30	Nowa lista z dnia 02 kwi 2020, g:10:30	List status new	List type contribution	Number of records 0 / erroneous records 15
Fri, 27 Mar 11:30	Nowa lista z dnia 27 mar 2020, g:11:30	List status new	List type contribution	Number of records 1
Fri, 27 Mar 11:17	Nowa lista z dnia 27 mar 2020, g:11:16	List status new	List type contribution	Number of records 0
Fri, 27 Mar 11:15	Nowa lista z dnia 27 mar 2020, g:11:15	List status new	List type contribution	Number of records 0

Components of the import window:

List name

The application does not transfer the name of the source file imported into the application but it assigns a new name to the list as follows:

New list of (day) (month, abbreviated) (year), (time xx:xx)

The administrator can, however, change the filename assigned by the application at this point.

Data source

The application is designed to import files conforming to the guidelines prepared by the Working Group of the Polish Development Fund (PFR) (cooperation of Financial Institutions, providers of ERP software and Transfer Agents).

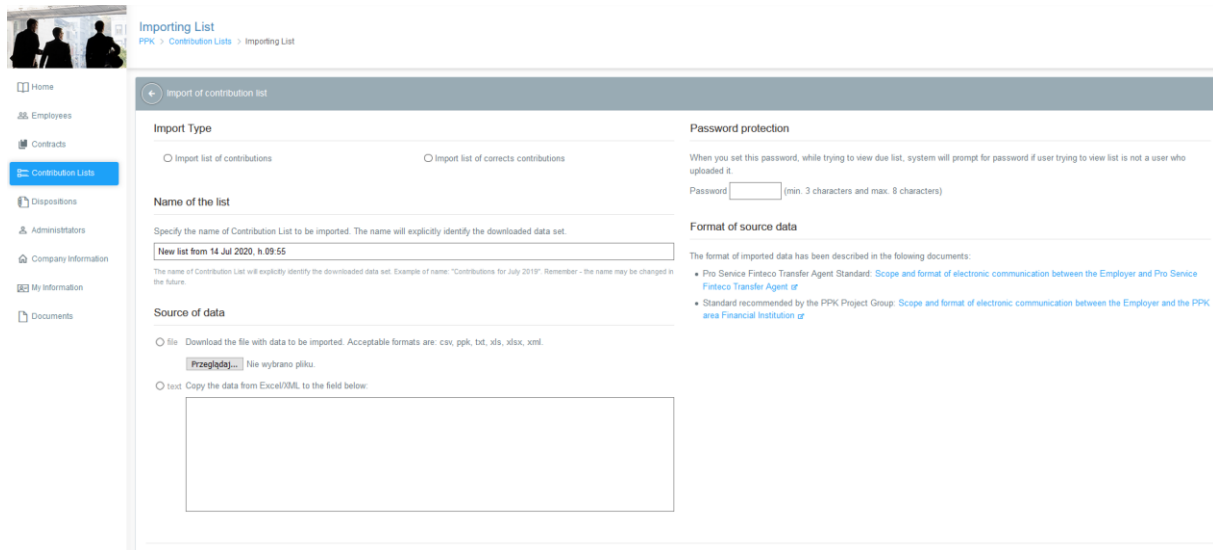
The application supports the following files: xml, xlsx, xls, csv, txt and ppk.

File formats may change with time due to technical or legal reasons. The current file specification can be found in the bottom right part of the employee list import screen.

Import options

The application imports every successive file separately, without overwriting or replacing the records in previously imported files. Subsequent files are saved chronologically, and they are displayed from the latest to the oldest.

If two files are saved with the same name, they can be identified only based on the chronological order in which they were imported.



The application automatically assigns a name to the new list and enables changing the name so that the names can be accordingly adjusted to the lists. When a list of contributions / correction of the list of contributions is imported, the system verifies the tax identification

number (NIP) and statistical number (REGON) saved in the XML file. If it finds that the NIP or REGON number is inconsistent with the data of the company saved in the system, PPK Serwis will display a message informing that the data of the company are inconsistent with the data in the list of contributions.

Displayed 6 results

Employee	Term	Basic contr. Employee	add. contr. Employee	Basic contr. employer	add. contr. employer	Reduced Basic contr.	Record status	Actions
Last and first name Arecka Zofia	8/2019	170.00 PLN	0.00 PLN	127.50 PLN	106.25 PLN	NO	incorrect record UoP (Management Contract)	Delete record
Rozbieżność z UoP: [nr_pesel] 51120543946 <-> 62041441286								
Last and first name Kacprzak Grazyna	8/2019	100.00 PLN	25.00 PLN	75.00 PLN	62.50 PLN	NO	incorrect record UoP (Management Contract)	Delete record
Rozbieżność z UoP: [nr_pesel] 73122756762 <-> 87021096661								
Last and first name Małoszczyk Ewa	8/2019	36.00 PLN	0.00 PLN	27.00 PLN	22.50 PLN	NO	incorrect record UoP (Management Contract)	Delete record
Rozbieżność z UoP: [nr_pesel] 85050904108 <-> 74022084009								
Last and first name Masłosz Jacek	8/2019	110.00 PLN	55.00 PLN	82.50 PLN	68.75 PLN	NO	incorrect record UoP (Management Contract)	Delete record
Rozbieżność z UoP: [nr_pesel] 76081241153 <-> 78102534497								
Last and first name Niewadomska Lidia	8/2019	11.25 PLN	0.00 PLN	33.75 PLN	28.13 PLN	YES	incorrect record UoP (Management Contract)	Delete record

Also the period for which the contribution is transferred is validated. PPK Serwis will display the following message at first: “Remember to verify the settlement period for the transferred list of contributions. If there is an error, correction will be difficult.” This message is purely for information purposes.

Afterwards, PPK Serwis will check during the import whether, in relation to the first data set from the list, the contribution for a given period has already been transferred. If the outcome of the verification is positive, i.e. the list has already been transferred for a given period, PPK Serwis will ask to confirm the decision to import with the following message: “The list of contributions for the settlement period indicated in the file has already been transferred. Do you want to continue?”. Select “No” [“Nie”] to abort the process. Select “Yes” [“Tak”] to proceed to the summary screen.

If the list does not contain errors, the following message will appear above the summary screen:

“The list of contributions is correct, do you want to send it?”

Click “No” [“Nie”] to be redirected to a page with the list of the imported contributions, from which it will be also possible to send it (see below – “Szczegóły Listy” graphic). Select “Yes” [“Tak”] send the list to TA immediately and display the summary screen.

If the list of contributions contains errors, the following message will appear:

“The list of contributions contains errors. After deleting them, reload the list.”

Click “Close” [“Zamknij”] to be redirected to the screen with the list of errors (see below – error screen).

After reading the list of contributions / list of corrections, the system will show the status of the list and the total amounts.

Date created	Name	List status	List type	Records
Thu, 02 Jul 11:23	Nowa lista z dnia 02 lip 2020, g.11:23	List status new	List type contribution	Number of records 0 / erroneous records 1
Thu, 25 Jun 11:28	Nowa lista z dnia 25 cze 2020, g.11:27	List status new	List type contribution	Number of records 0 / erroneous records 6

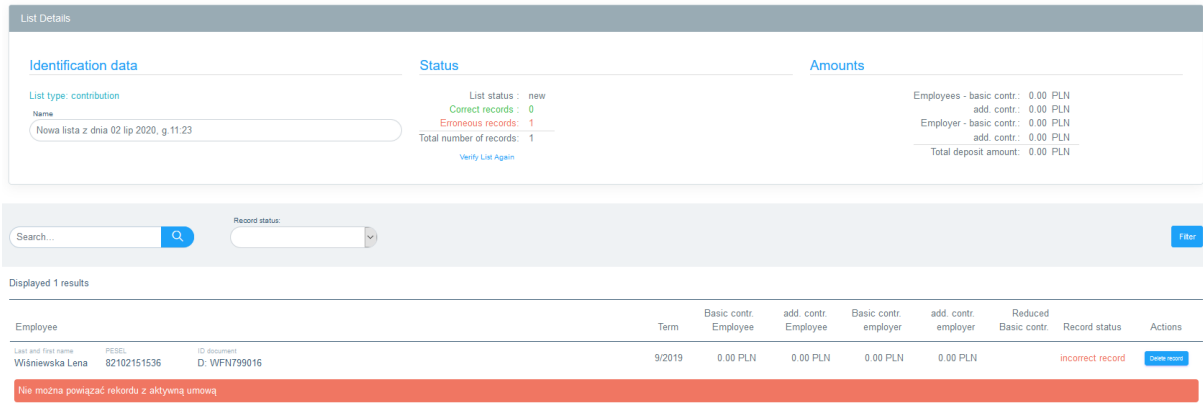
CONTRIBUTION

List Details		
Identification data	Status	Amounts
List type: contribution Name: <input type="text" value="Nowa lista z dnia 02 lip 2020, g.11:23"/>	List status : new Correct records : 0 Erroneous records : 1 Total number of records: 1 Verify List Again	Employees - basic contr.: 0.00 PLN add. contr.: 0.00 PLN Employer - basic contr.: 0.00 PLN add. contr.: 0.00 PLN Total deposit amount: 0.00 PLN

CORRECTION

List Details		
Identification data	Status	Amounts
List type: correction Name: <input type="text" value="Nowa lista z dnia 30 sty 2020, g.12:47"/>	List status : new Correct records : 0 Erroneous records : 0 Records for verification: 3 Total number of records: 3 Verify List Again	Employees - basic contr.: 6.00 PLN add. contr.: 0.00 PLN Employer - basic contr.: 0.00 PLN add. contr.: 0.00 PLN Total deposit amount: 6.00 PLN

Based on the submitted data, PPK Serwis verifies if management agreements have been created for all of the persons included in the submitted list of contributions. If the system finds persons with no management agreements, it will display their list and show a suitable message.



List Details

Identification data **Status** **Amounts**

List type: contribution List status: new
 Correct records: 0
 Erroneous records: 1
 Total number of records: 1
[Verify List Again](#)

Employees - basic contr.: 0.00 PLN
 add. contr.: 0.00 PLN
 Employer - basic contr.: 0.00 PLN
 add. contr.: 0.00 PLN
 Total deposit amount: 0.00 PLN

Search: Record status:

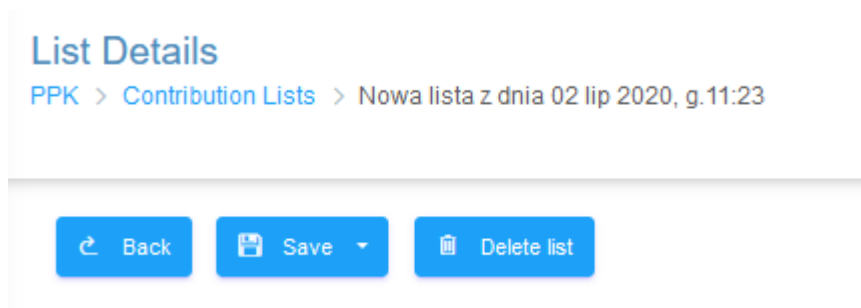
Displayed 1 results

Employee	Term	Basic contr. Employee	add. contr. Employee	Basic contr. employer	add. contr. employer	Reduced Basic contr.	Record status	Actions
<small>Last and first name</small> Wiśniewska Lena <small>PESEL</small> 82102151536 <small>ID document</small> D: WFN799016	9/2019	0.00 PLN	0.00 PLN	0.00 PLN	0.00 PLN		incorrect record	<input type="button" value="Send request"/>

Nie można powiązać rekordu z aktywną umową

The message indicates that the list of contributions includes persons with no filed request for the creation of a management agreement. The employer should then verify if such indicated persons have been reported to the PPK Serwis system. If they have to be reported, it is necessary to immediately send a request to create a management agreement for the newly added employees.

It may take a few days before the submitted information is processed in accordance with the statutes and regulations of the Fund. This time should be taken into consideration when reporting the employees and submitting the list of contributions. If the list of contributions is correct, the employer may send it to be accounted for.



List Details

PPK > Contribution Lists > Nowa lista z dnia 02 lip 2020, g.11:23

Sending the list of contributions to be accounted for is not equivalent to the accounting and posting of the amounts to the records of the participants (employees). This takes place only after a correct list of contributions is sent and after the money corresponding to the submitted

list of contributions is sent to the account of the Fund. The transferred amount should correspond to the total amount in the list of contributions. **The description of the transfer should include a reference number assigned to each sent list of contributions.** The list or transfer will not be rejected if the number is missing. The reference number will automatically link transfers to the list of contributions.

If the amount of the transfer is greater than the total amount in the list of contributions, the money will be accounted for in accordance with the list of contributions, and any excess money will be returned to the account from which it was sent.

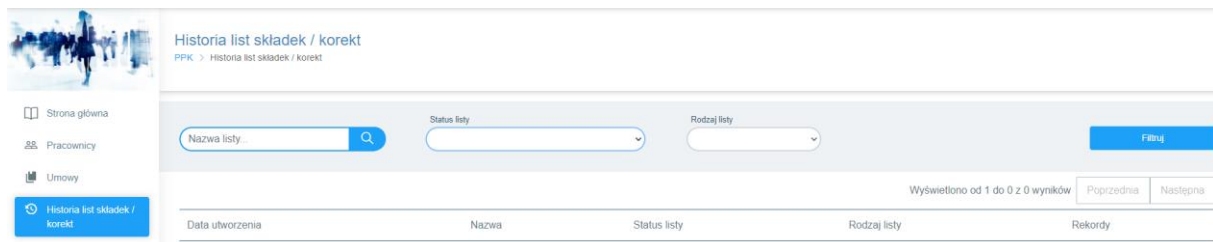
If the transferred amount is smaller than the total amount in the list of contributions, the list will not be accounted for and will be sent for clarification. The clarification process will be conducted in accordance with the procedure of the financial institution.

Responsibility for calculating the contributions and sending them to be accounted for in the Financial Institution rests with the Employer.

6.2 History of the list of contributions

The history section of the list of contributions is started with the parameter per application instance and contains all historically submitted lists of contributions with their statuses. Not only the lists loaded directly via PPK Serwis are presented, but also those sent via API.

The page allows you to filter the results by part of the filename, list status or list type. The statuses are updated once at night, during the data import, which takes place after each day of the WSE operation.



Information presented:

- creation date - date the list was uploaded to the website
- list name - individual name of each list of contributions
- list status - the last registered status of the list
 - prepared for shipment to AT
 - transferred to AT
 - completed
- type of list - can take two values:
 - list of contributions
 - the list of corrections

Available filters:

- List name – filtering by the whole or a fragment of name
- List status – in line with the above statuses
- List type – list of contributions or list of corrections

After selecting an item on the list, the following details will be presented:

List Details

Identification data	Status	Kwoty
List type: list of contributions Name: Nowa lista z dnia 15 lut 2021, g 11:55	List status : Realized Reference number: total number of records: 6	Employer pri contr. PLN Employer add contr. 0.00 PLN Employee pri contr. : PLN Employee add contr. 0.00 PLN Total deposit amount PLN
Information		
The sum of deposits from the contribution list PLN has to be equal to the transfer amount. Incompliance of the amount will prevent processing of contributions by ECP Participants Incompatibility of the amount will prevent the processing contributions of PPK Participants. No reference number may extend time of due settlement		

Search...

Displayed from 1 to 6 of 6 results Previous Next

Employee			Term	Employer pri contr.	Employer add contr.	Employee pri contr.	Employee add contr.	Reduced pri contr.	
Last and first name	PESEL number	ID document	IT ID	1/2021	PLN	0.00 PLN	PLN	0.00 PLN	no
Last and first name	PESEL number	ID document	IT ID	1/2021	PLN	0.00 PLN	PLN	0.00 PLN	no

List details:

- List type
- Name
- List status
- List reference number

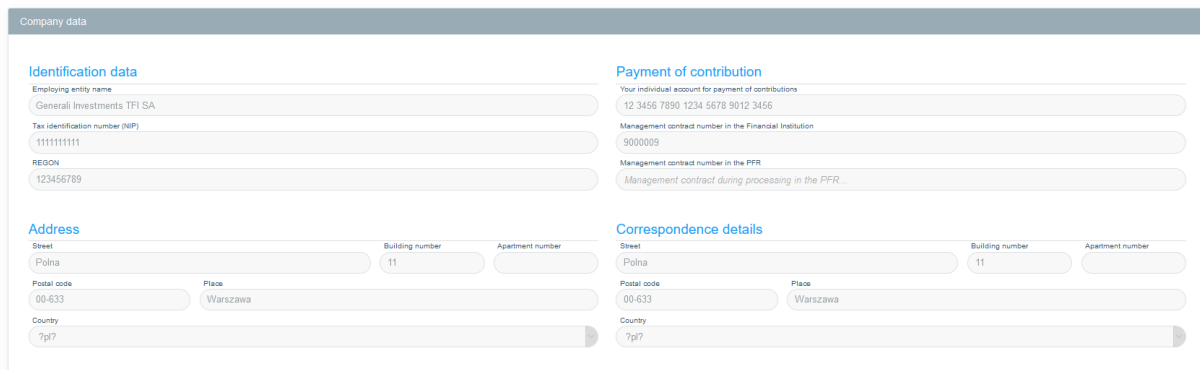
Sums of contributions (employer's basic contribution, employer's additional contribution, employee's basic contribution, employee's additional contribution)

Details of contributions for individual employees:

- Full name
- PESEL
- ID document
- Employee's IT ID
- Contribution period
- Employer's basic contribution
- Employer's additional contribution
- Employee's basic contribution
- Employee's additional contribution
- Reduction of basic contribution

7. Company data

The “Company data” [“Dane Firmy”] section presents the data of the employer whose employees are managed in the system. The company data also include the bank account to which all payments to the fund of the Employee Capital Plan should be made. The bank account is individually dedicated to each employer.



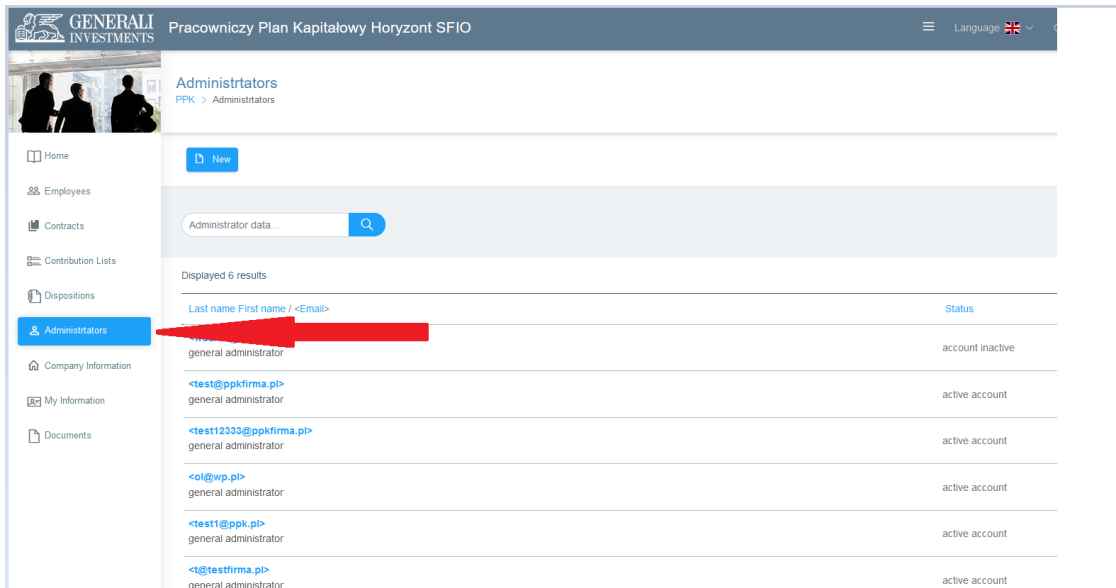
Company data			
Identification data		Payment of contribution	
Employing entity name General Investments TFI SA		Your individual account for payment of contributions 12 3456 7890 1234 5678 9012 3456	
Tax identification number (NIP) 1111111111		Management contract number in the Financial Institution 9000009	
REGON 123456789		Management contract number in the PFR Management contract during processing in the PFR	
Address		Correspondence details	
Street Polna	Building number 11	Street Polna	Building number 11
Apartment number		Apartment number	
Postal code 00-633	Place Warszawa	Postal code 00-633	Place Warszawa
Country ?pl?		Country ?pl?	

The employer’s data can be changed by reporting the need to change the data in writing (e-mail) to the dedicated client account manager (appointed by the Financial Institution).

8. Administrators

In the Administrators section, new administrators can be added and their authorisations managed. Through the Administrators section, the employer can add new employer administrators to particular parts of the system.

A newly added administrator with access restricted exclusively to selected sections may add a new administrator with the same or lower level of authorisation.



Pracowniczy Plan Kapitałowy Horyzont SFIO

Administrators
PPK > Administrators

Administrator data...

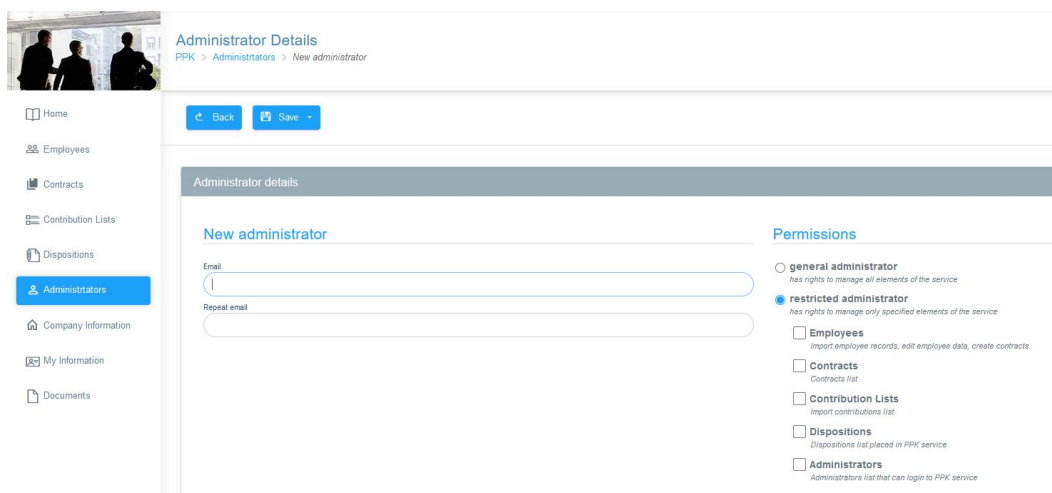
Displayed 6 results

Last name First name / <Email>	Status
general administrator	account inactive
<test@ppkfirma.pl> general administrator	active account
<test12333@ppkfirma.pl> general administrator	active account
<oj@wp.pl> general administrator	active account
<test1@ppk.pl> general administrator	active account
<t@testfirma.pl> general administrator	active account

8.1 Administrators' boarding

- To add a new administrator, enter and then re-enter their e-mail address to avoid potential mistakes. The administrator shall enter their remaining data – i.e. full name, personal identification number (PESEL) or the date and country of birth – themselves, provided that they do not have an existing account in the ECP System (ECPS).

The provided email address should be a personal address, separate for each administrator of the Employer.



Administrator Details
PPK > Administrators > New administrator

Back Save

Administrator details

New administrator

Email
Repeat email

Permissions

general administrator
has rights to manage all elements of the service

restricted administrator
has rights to manage only specified elements of the service

Employees
Import employee records, edit employee data, create contracts.

Contracts
Contracts list

Contribution Lists
Import contributions list.

Dispositions
Dispositions list placed in PPK service

Administrators
Administrators list that can login to PPK service

2. Administrators managed at the ECPS level may fall into the following categories:
 - a **general administrator** – full authorisation under the ECPS for a given ECP Management Contract;
 - a **special administrator** – specific authorisations only.
3. A special administrator may be granted authorisations to the following modules/functions:
 - employees;
 - contracts;
 - lists of contributions;
 - instructions;
 - administrators

The individual modules correspond to the elements of the menu displayed on the left.

4. Once a new administrator is added:
 - their identification details (i.e. e-mail address, name and surname) may not be changed;
 - the account activity and authorisations may be edited;
 - until a new administrator accepts the invitation to manage the ECP for a given ECP Management Contract and provides their details (name, surname, etc.), no other identification details apart from the e-mail address will be displayed.

Details of the administrator **prior to** accepting the invitation:

Administrator details

Identification data

Email
woznik@firmappk.pl

Status

Activation state
Waiting for login

Last login
User has not logged in yet

Options
 active account

Permissions

general administrator
has rights to manage all elements of the service

restricted administrator
has rights to manage only specified elements of the service

Details of the administrator **after** accepting the invitation:

5. Once a new administrator is added, an e-mail with the invitation to manage the ECP for a given ECP Management Contract is sent. The invitation may take two forms, depending on whether a given address has already been listed in the ECP/EPS administrator database, and whether the account had been activated:
 - a totally new account or an inactive account – an e-mail compliant in the form with the “ECP – new administrator account – new e-mail” template is sent;
 - an existing active account – an e-mail compliant in the form with the “ECP – new administrator account – existing e-mail” template is sent.

6. The further ECP administrator account activation process depends on the above-listed differentiation:
 - **a totally new account or an inactive account**
In the e-mail, the user receives a link to activate the account. After clicking on the link, the User is directed to a website on which they can activate their account – we enter the previously started ECP administrator account activation process.
 - **Existing active account**
In the e-mail, the user receives a link to the login website. After logging in, an ECP Management Contract for which the account has been set up is selected.

7. In the case of a **totally new account**, when the e-mail address is the only information about the administrator we have, the administrator – before commencing any work in the ECPS – must enter the following personal details: full name, personal identification number (PESEL) or the date and country of birth. To proceed to the next stage of the process, the above data must be provided.

Provide email address

Retype email address.

Administrator details

New administrator

Email

Repeat email

Permissions

general administrator
has rights to manage all elements of the service

restricted administrator
has rights to manage only specified elements of the service

Employees
Import employee records, edit employee data, create contracts.

Contracts
Contracts list

Contribution Lists
Import contributions list

Dispositions
Dispositions list placed in PPK service

Administrators
Administrators list that can login to PPK service

8.2 Managing special authorisations at the ECPS level

1. Administrators managed at the ECPS level may fall into the following categories:
 - **a general administrator** – full authorisation under the ECPS for a given ECP Management Contract;
 - **a special administrator** – specific authorisations only.
2. A special administrator may be granted authorisations to the following modules/functions:
 - employees;
 - contracts;
 - lists of contributions;
 - instructions;
 - administrators.

The individual modules correspond to the elements of the menu displayed on the left.

Permissions

- general administrator**
has rights to manage all elements of the service
- restricted administrator**
has rights to manage only specified elements of the service
- Employees**
Import employee records, edit employee data, create contracts.
- Contracts**
Contracts list
- Contribution Lists**
Import contributions list
- Dispositions**
Dispositions list placed in PPK service
- Administrators**
Administrators list that can login to PPK service

3. New authorisations are granted in accordance with the **authorisation masking** principle, as per which the administrator editing the authorisations of the other administrator cannot show them authorisations that go beyond the scope of their own authorisations. This particularly means that:

- a special administrator may not grant the other administrator the general administrator authorisation;
- a special administrator may not grant authorisations to modules they have not been authorised to manage.

There are no restrictions as to the limitation of authorisations.

8.3 Log of authorisation changes

All changes made to the ECP administrator account may be found in the account history:

History

Thu, 20 Aug	12:09	Generali Test	Powiązano z UoZ general administrator: nie -> tak
	12:09	Generali Test	Utworzenie konta.

The information marked with a '+' sign indicates that an authorisation has been granted, while the information marked with a '-' sign – that an authorisation has been revoked.

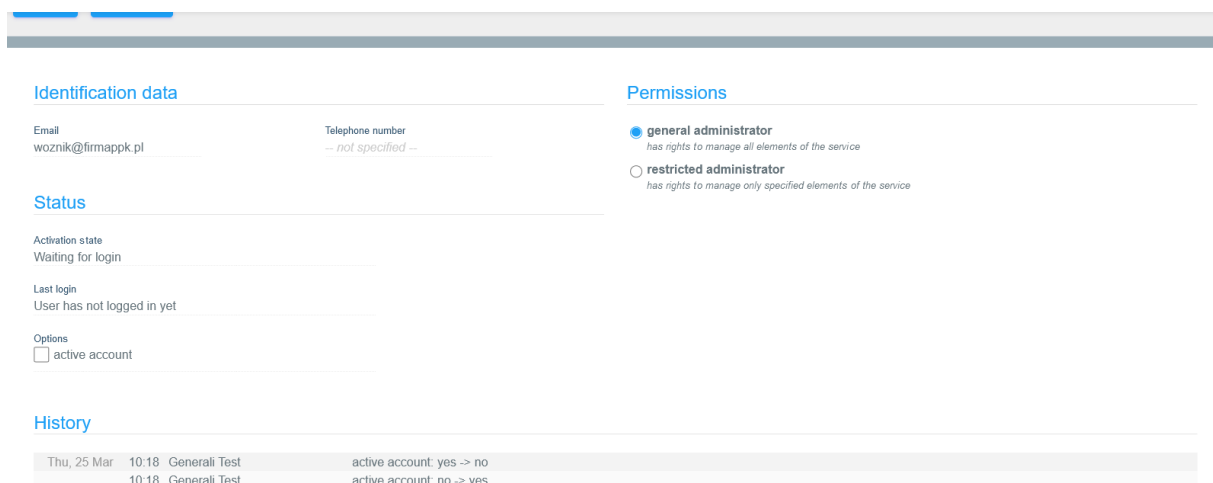
8.4 Revocation of permissions

The system requires that there be at least one general administrator with access to the entire system.

If the Employer wants to revoke access rights of an administrator, it should find the relevant administrator in the “Administrators” section and uncheck the “Account is active” checkbox, which will automatically deactivate the account and the administrator with the deactivated account will not be able to log in to the system. An administrator cannot deactivate his/her own account.

In case of emergency, if the employer wants to revoke access rights of the last administrator who has access to the system, the employer should contact the service desk at **pomoc-ppk@psfinteco.pl** or by phone on **22 355 46 66**.

An administrator’s account may be deactivated temporarily. To reactivate an account, please check the “Account is active” checkbox.



The screenshot displays a user management interface with the following sections:

- Identification data:** Email: woznik@firmappk.pl; Telephone number: -- not specified --
- Status:** Activation state: Waiting for login; Last login: User has not logged in yet; Options: active account
- Permissions:** general administrator (has rights to manage all elements of the service); restricted administrator (has rights to manage only specified elements of the service)
- History:** A table with columns for date, time, user, and action.

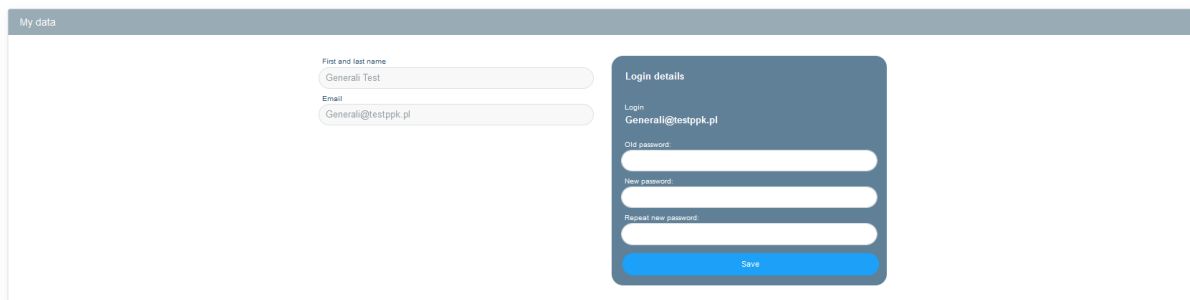
Date	Time	User	Action
Thu, 25 Mar	10:18	Generali Test	active account: yes -> no
	10:18	Generali Test	active account: no -> yes

The system displays the list of all administrators added, with information on access rights granted and the account status. Administrators with deactivated accounts are not removed from the list.

Displayed 10 results	
Last name First name / <Email>	Status
<woznik@firmappk.pl> general administrator	account inactive

9. My data

The “My data” [“Moje Dane”] section presents the data of the user. The user can also use this section to change the password.



The user’s data can be changed by reporting the new data to the client account manager (employer) appointed by the Financial Institution. The change may be submitted by e-mail.

10. Documents

The “Documents” [“Dokumenty”] section has been created to collect the necessary documents in a single place for the user’s convenience. The documents in this section are provided by the transfer agent.

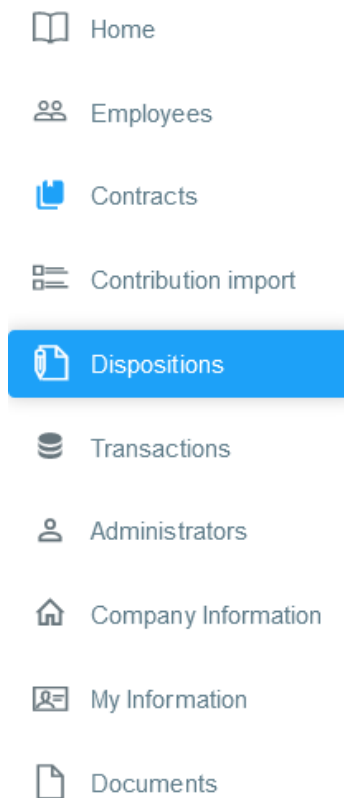
11. Instructions

The Employee Capital Plan Act obliges the employer to submit instructions issued by the employee to the Financial Institution. The PPK Serwis system can be used to submit

instructions by importing the files described by the Working Group of the Polish Development Fund or by entering them “manually” using a form.

11.1 Importing files with instructions

Using the “Instructions” [“Dyspozycje”] section, the employer can import the instructions using the files described by the Working Group of the Polish Development Fund.



In order to enter the instructions of the employees, the employer should prepare a suitable file to be imported into the system. The application is designed to import files conforming to the guidelines prepared by the Working Group of the Polish Development Fund (PFR) (cooperation of Financial Institutions, providers of ERP software and Transfer Agents) and files compliant with the guidelines of ProService Finteco.

Instructions can only be submitted for Employee Capital Plan management agreements with

the “Active” status:

If the employee’s agreement has a status other than “Active”, an error message will be shown, e.g.:

Nazwisko i imię Jan Maria	PESEL 79021867589	Dok. tożsamości D: ZMX899363	ID informatyczny	UCZ_REZYGNACJA	12.12.2019	z błędami	Usuń rekord
Nie znaleziono pracownika: 79021867589,45215							

Types of instructions imported in a file:

- a) Opting-out from contributions to the Employee Capital Plan,
- b) Resumption of contributions to the Employee Capital Plan. The declaration is used only if an employer has a participant in the Employee Capital Plan who has opted-out from the plan and then decided to rejoin it (it is not applicable to the automatic rejoining, which is to take place at 4-year intervals according to the act),
- c) Changing the identification details of the employee,
- d) Changing the electronic contact details of the employee (e-mail address and mobile phone number).
- e) Employment termination,
- f) PPK transfer (list)

The format of the instructions has been prepared by the Working Group of the Polish Development Fund. The file with the instructions prepared in accordance with the guidelines of the Working Group should be imported into the PPK Serwis system. The application verifies the file to check if all fields are complete.

11.2 Instruction form

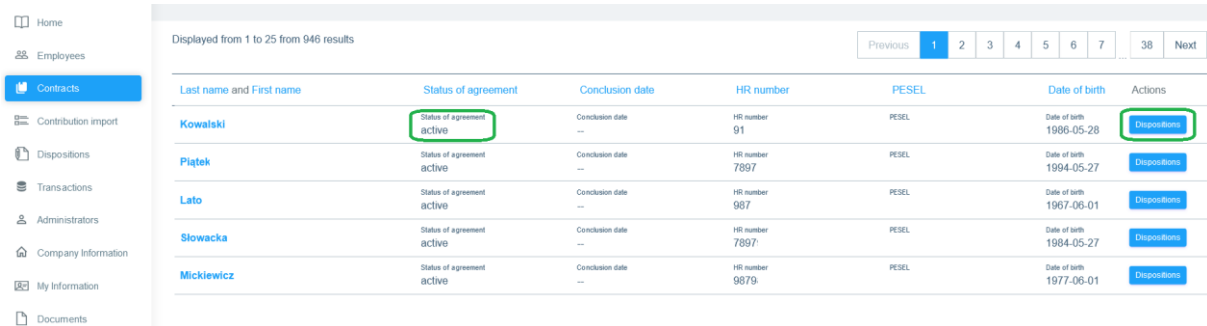
After entering the “Instructions” [“Dyspozycje”] section from the level of the management agreement, the user will be redirected to the list of employees, which will include the option to submit instructions for specific employees.

Instructions can only be submitted for agreements with the “Active” status.

The instructions form can be used to submit the following:

- Instruction to opt-out from contributions to the Employee Capital Plan,
- Instruction to recommence contributions to the Employee Capital Plan,
- Instruction to change electronic contact details (e-mail address and mobile phone number).
- Data change instruction
- Transfer PPK
- Termination of employment

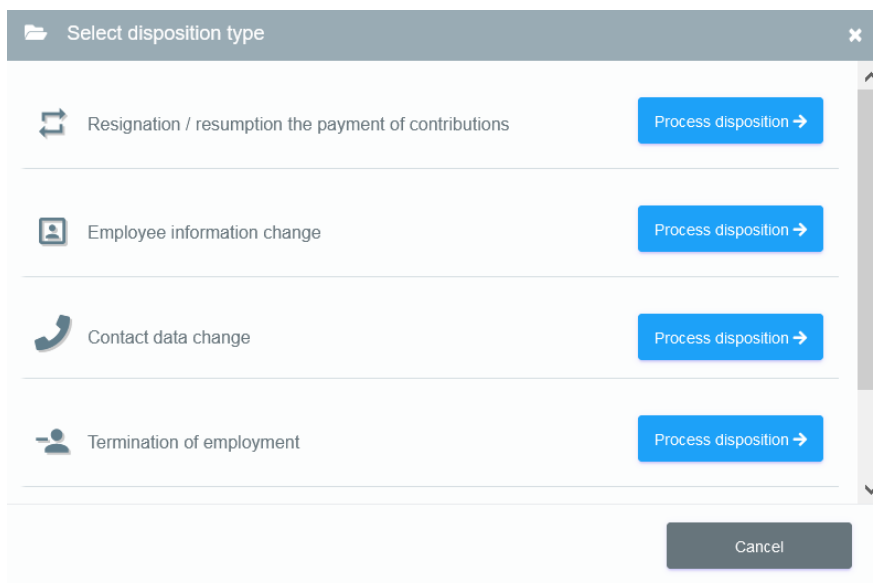
In the “Agreement” tab, the user should find the person on behalf of which the instruction is to be submitted. The user should click the “Instructions” button for the selected person.



Displayed from 1 to 25 from 946 results

Last name and First name	Status of agreement	Conclusion date	HR number	PESEL	Date of birth	Actions
Kowalski	active	---	91	PESEL	1986-05-28	Dispositions
Piatek	active	---	7897	PESEL	1994-05-27	Dispositions
Lato	active	---	987	PESEL	1967-06-01	Dispositions
Slowacka	active	---	7897	PESEL	1984-05-27	Dispositions
Mickiewicz	active	---	9879	PESEL	1977-06-01	Dispositions

This will display a screen with the available instructions.



Select disposition type

- Resignation / resumption the payment of contributions Process disposition →
- Employee information change Process disposition →
- Contact data change Process disposition →
- Termination of employment Process disposition →

Cancel

The user should select the relevant instruction and then add the required information in the form.



The screenshot shows a web form titled "Make disposition". It is divided into two main sections: "Employee" and "Disposition data".

Employee section:

- Name: Jan
- Surname: Kowalski
- PESEL:
- Employee number: none

Disposition data section:

- Disposition type: Contributions will be sent (dropdown menu)
- Resume date: 30-03-2021 (calendar icon)
- Date of submitting the declaration to the employing entity

At the bottom left, there are two buttons: "Back" and "Send disposition". The "Send disposition" button is highlighted with a green rounded rectangle.

Information about instructions submitted using the form will be saved in the history of the management agreement for each employee.

History

2020-01-29 16:58 Contract active (demo).

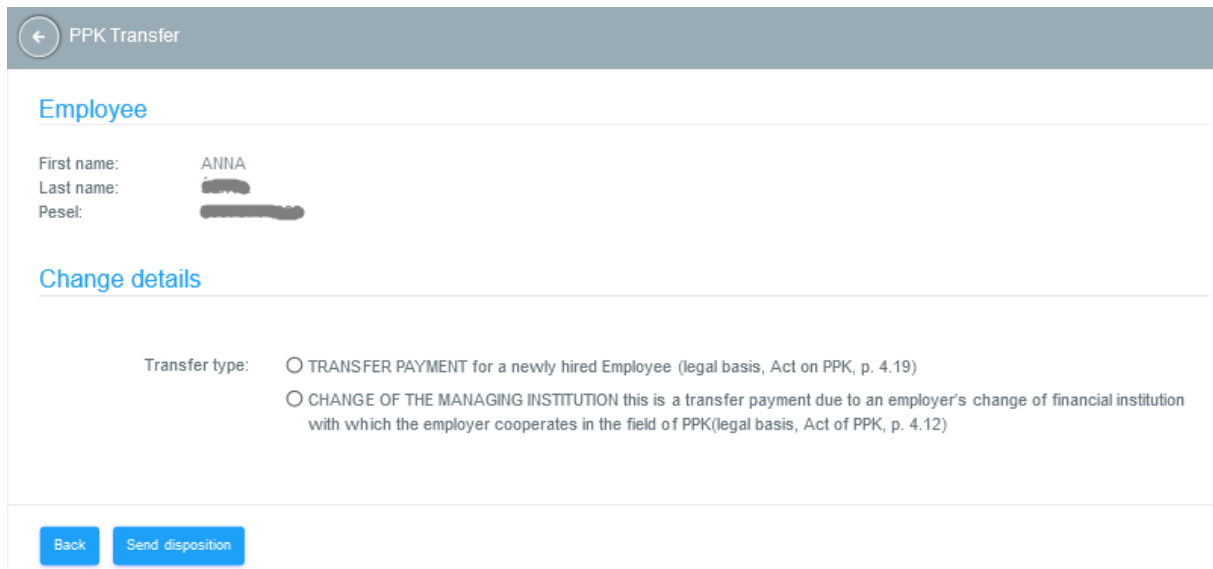
Transfer order

Due to the less obvious nature of this disposition, its legal basis and functioning are described below. Through the PPK Service, it is possible to submit a transfer payment in 2 cases specified in the Act, i.e. in accordance with Article 12 par. 4 and art. 19 paragraph 4. In the case of Art. 12 section 4 (change of the manager), the transfer payment takes place when the employer changes the Financial Institution (IF) to which he will pay contributions. Initially, the employer should conclude a new management contract with a new one institution, set up management contracts, and then select the option of changing the manager in the details of the transfer order in PPK Serwis. Only such a case is supported by this option.

The second transfer option linked to Art. 19 (4) mentions new employees. After the time

specified in the act, the employing entity should make a transfer payment from other Employee PPK contracts to the one established at the employer's.

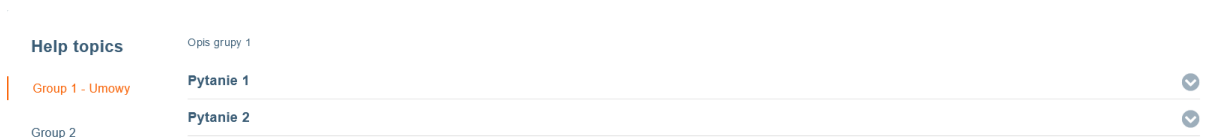
The transfer order form looks like this:



The screenshot shows a web form titled "PPK Transfer". At the top left, there is a back arrow icon and the text "PPK Transfer". Below this, the form is divided into sections. The first section is titled "Employee" and contains the following fields: "First name:" with the value "ANNA", "Last name:" with a redacted value, and "Pesel:" with a redacted value. The second section is titled "Change details" and contains a "Transfer type:" label followed by two radio button options. The first option is "TRANSFER PAYMENT for a newly hired Employee (legal basis, Act on PPK, p. 4.19)". The second option is "CHANGE OF THE MANAGING INSTITUTION this is a transfer payment due to an employer's change of financial institution with which the employer cooperates in the field of PPK(legal basis, Act of PPK, p. 4.12)". At the bottom of the form, there are two buttons: "Back" and "Send disposition".

12. FAQ

The FAQ section includes frequently asked questions and answers regarding the functioning of PPK Serwis and the PPK product. The section is common for all instances, which means that the same content is presented to clients of all TFIs. The section is developed dynamically, i.e. questions and answers are added successively as a result of the evaluation of the frequency of appearance of questions and problems on the HelpDesk. Clicking on a question displays the answer.

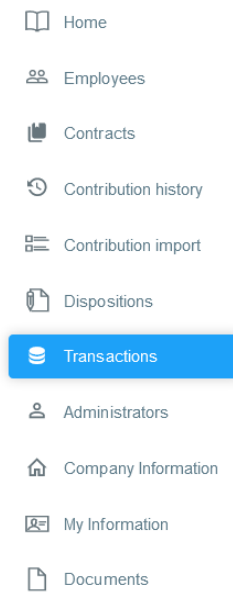


The screenshot shows a FAQ section with a "Help topics" header. Below the header, there are two groups of questions. The first group is "Group 1 - Umowy" and contains two questions: "Opis grupy 1" and "Pytanie 1". The second group is "Group 2" and contains one question: "Pytanie 2". Each question has a dropdown arrow icon to its right.

13. Transactions

[“Transakcje”] section

This new section is available in the left side navigation and allows users to view and download reports on instructions and transactions submitted by employees. This section is parameterisable, which means that it can be enabled at the Investment Company’s request.



Pursuant to the Act (Article 12(6), Article 19(6), Article 97), the Financial Institution is obliged to report certain instructions of participants to employers. This applies to returns made by the participant, withdrawals, including withdrawals after the age of 60, and transfer withdrawals in the circumstances specified in the Act. The employer should be informed (this feature is in development) about the above events in due time.

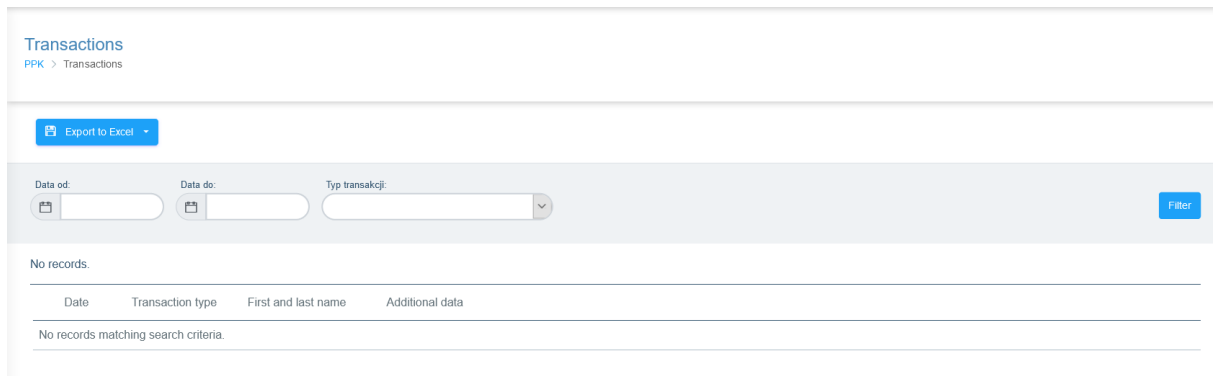
Initially, the “Transactions” section has basic features, which will be expanded soon. As at the preparation of this documentation, they include presentation of returns and transfers. It is possible to filter them by the submission date and to export them to xlsx and csv formats.

A report visible in PPK Serwis is composed of 4 primary columns:

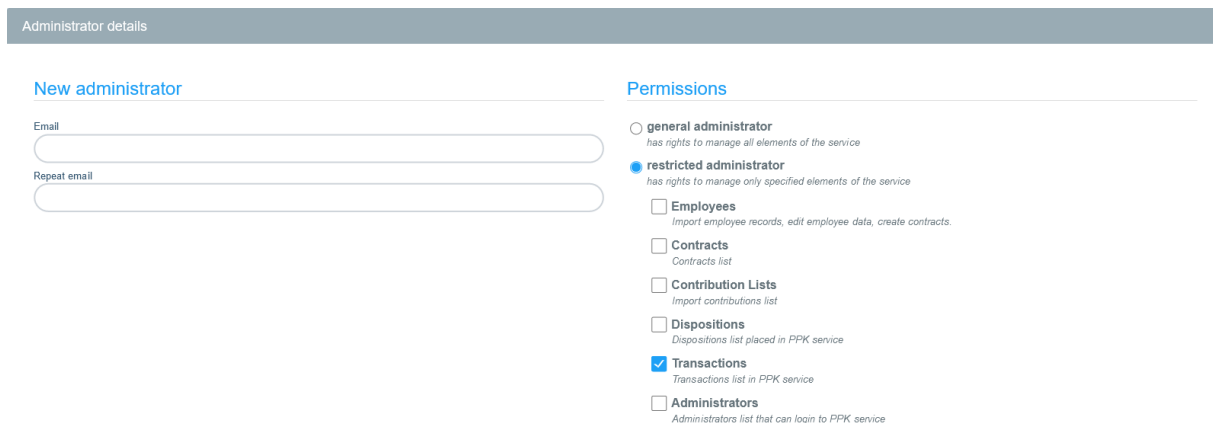
- Date [Data] – instruction request date

- Transaction type [Typ transakcji] – only refund type transactions are available at the beginning, successive ones will be added shortly
- Full name [Imię i nazwisko] – employee’s details
- Additional data [Dane dodatkowe] – additional columns depending on transaction type

In the case of exporting to a file, data are appropriately distributed among the columns.



It is also possible to manage the access to the section within the authorisations of the application’s administrator. The new item within the Administrators [Administratorzy] section is responsible for the access.

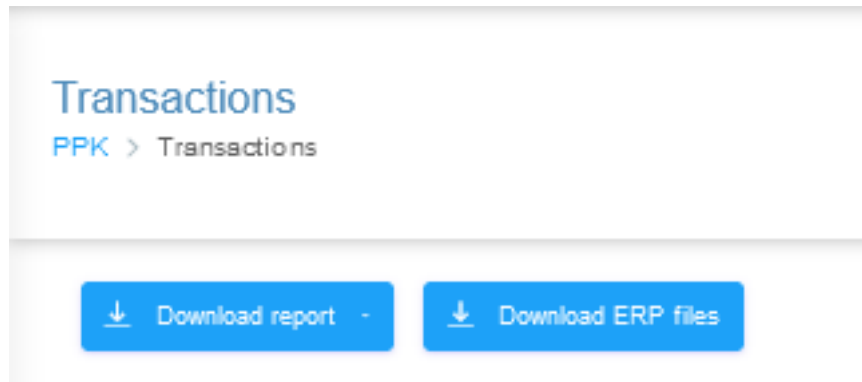


Notifications of transactions/instructions

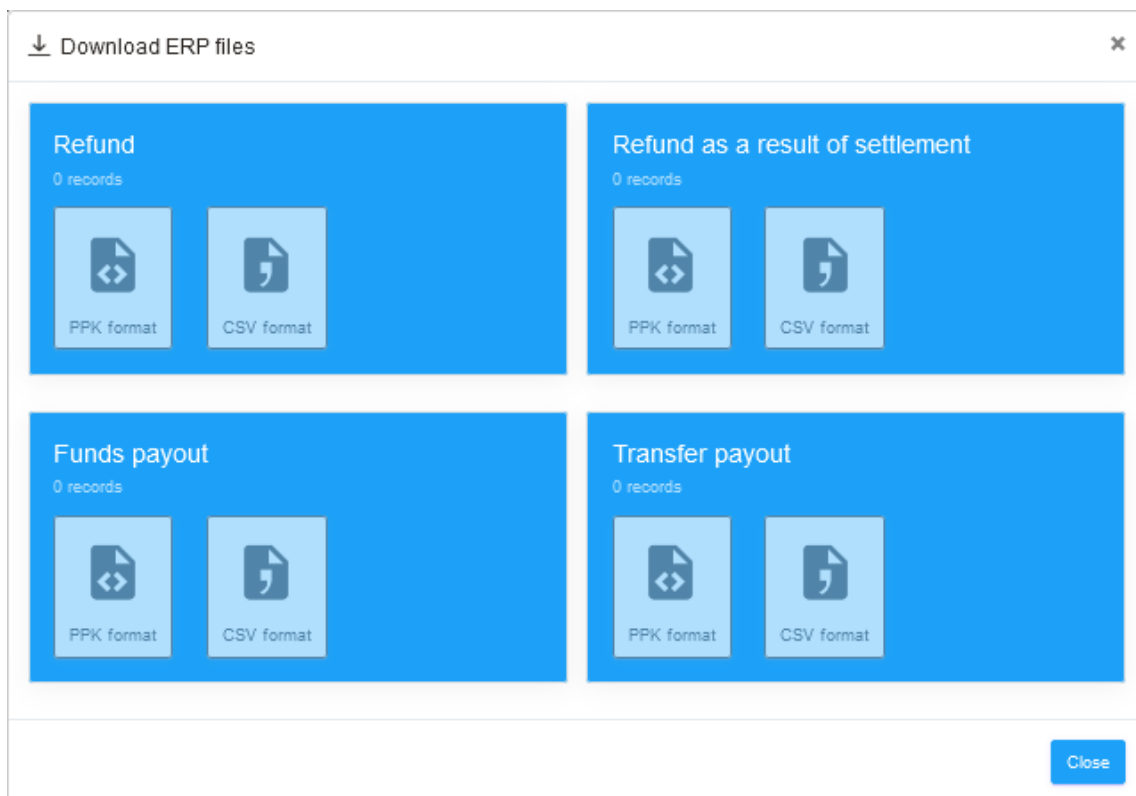
For the “Transactions” section it is possible to enable the sending of email notifications of new entries in this section. The email is sent at the frequency defined by the Insurance Company to the email addresses of the employer’s administrators who have relevant authorisations: access to the “Transactions” section. The email content can be edited and allows the author to indicate the number of new transactions/instructions over a defined period.

Downloading files to power ERP systems:

In addition to downloading reports, the "Transactions" section also allows you to download files in formats defined by the working group, which can be used to supply ERP systems. The functionality is available in the upper part of the section via the "Download ERP files" button:



Selecting this item will display an array of files with the option to download them in the selected formation:



The downloaded file can be used to supply the ERP system, as long as it is adapted to its operation.

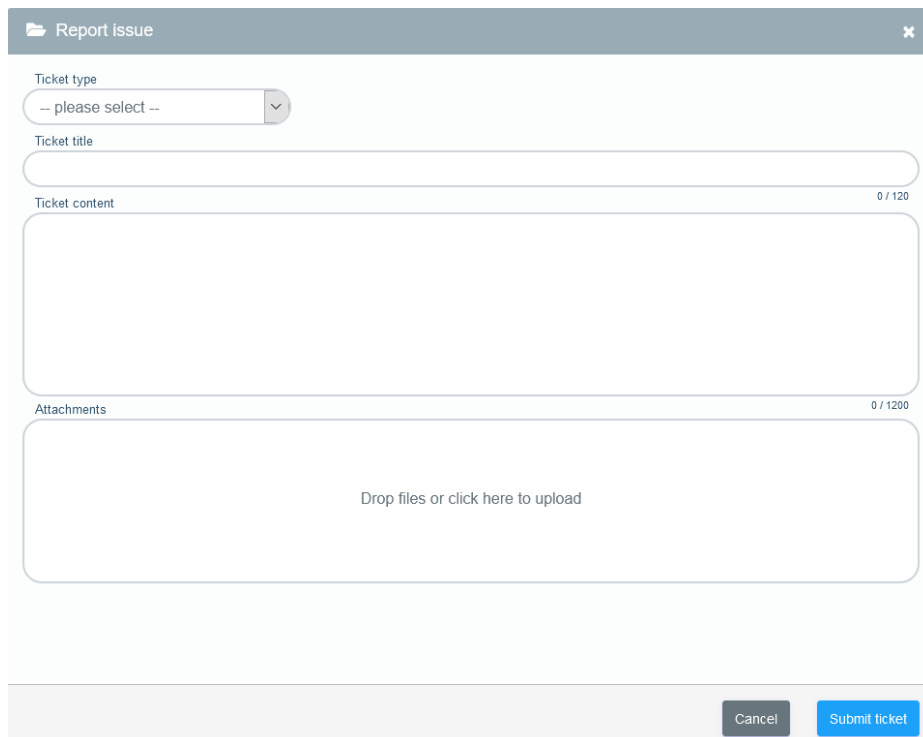
14. Contact form

For the purpose of streamlining and improving the quality of the submissions from employers that use PPK Serwis, a dedicated submission form has been deployed. Ultimately it will replace the currently used email address.

Once it has been launched (currently tests are in progress on a limited group of users), the PPK Serwis footer will be expanded by an additional item “Contact form”



Once it has been clicked, the following submission form will be displayed:



The screenshot shows a web form titled "Report issue" with a close button (X) in the top right corner. The form contains the following fields:

- Ticket type:** A dropdown menu with the text "-- please select --" and a downward arrow.
- Ticket title:** A single-line text input field.
- Ticket content:** A large multi-line text area with a character count of "0 / 120" in the top right corner.
- Attachments:** A large area for file uploads with a character count of "0 / 1200" in the top right corner. The text "Drop files or click here to upload" is centered in this area.

At the bottom right of the form, there are two buttons: a grey "Cancel" button and a blue "Submit ticket" button.

Form fields:

- “Submission type” [“Typ zgłoszenia”] – specifies the topic of the submission. Categorisation will speed up forwarding the submissions to relevant TA departments. Available options:
 - data update [aktualizacja danych] – submissions regarding updates of data which

cannot be changed via PPK Serwis, e.g. those included in the administration agreement

- provision of information [udzielenie informacji] – any kinds of questions about PPK Serwis and ECP
- website error [błąd serwisu] – submissions regarding errors in PPK Serwis
- other [inne] – other submissions which do not match the above categories
- “Date of occurrence” [“Data wystąpienia”] – current date is indicated by default. This field is useful in particular in “website error” submissions.
- “Approximate time of occurrence” [“Przybliżony czas wystąpienia”] – current time is indicated by default. This field is useful in particular in “website error” submissions.
- “Submission title” [“Tytuł zgłoszenia”] – brief information about the submission subject matter.
- “Submission content” [“Treść zgłoszenia”] – description of the submission, up to 1,200 characters.
- “Attachments” [“Załączniki”] – it is possible to add any number of attachments, but their total size cannot exceed 10 MB.

Sending a defined submission results in its forwarding to the TA service system, similarly as in the case of the email address used at present: pomoc-ppk@psfinteco.pl. In addition, the content will be sent to the email address of the reporting person. Further statuses will not be forwarded, though.

Thanks to the use of the form, all submissions will be categorised and provided with additional information imported from PPK Serwis (if such information is available). Such information will be:

- Request ID,
- TFI,
- Company,
- Full name of reporting person,
- Email address of reporting person,
- Phone no. of reporting person,
- Web browser from which submission was sent,
- Operating system from which submission was sent,
- ID of reporting person’s session.