

# E-IMPULS – EMPLOYER'S PANEL

Instruction



Version 1.02

# Contents

<b>1. GENERAL INFORMATION</b>	<b>3</b>
<b>2. LOGIN PAGE</b>	<b>3</b>
<b>3. EMPLOYER PANEL</b>	<b>4</b>
<b>4. HOME PAGE</b>	<b>6</b>
<b>5. EMPLOYEES</b>	<b>7</b>
5.1 List of employees	7
5.2 Adding a new employee	8
5.3 Employee details	10
5.4 Exporting the list of employees	11
5.5 Importing the list of employees	11
<b>6. DECLARATIONS</b>	<b>13</b>
6.1 List of declarations	13
6.2 Declaration details	15
6.3 Settings	16
6.4 Link to submit declarations	16
6.5 Sending of links	17
<b>7. STATEMENTS</b>	<b>17</b>
7.1 List of statements	19
7.2 Statement details	21
7.3 Link to submit statements	22
7.4 Sending of links	23
7.5 Statements made on the Transaction Service	24
<b>8. LISTS OF CONTRIBUTIONS</b>	<b>25</b>
8.1 List of contributions details	26
8.2 Creating a new list of contributions	26
8.3 Importing the list of contributions	27
<b>9. VOTE</b>	<b>28</b>
9.1 List of candidates	28
9.2 Candidate details	29
9.3 Settings	29
9.4 Preview the vote page	30
9.5 Sending of links	31
<b>10. REPORTS</b>	<b>32</b>
<b>11. SUBMITTING A DECLARATION</b>	<b>33</b>
<b>12. SUBMITTING A STATEMENT</b>	<b>35</b>



# 1. General Information

*e-Impuls - Employer Panel* is a system designed for employers to manage Employee Pension Schemes (EPS). In particular, it is used to view and accept EPS declarations and statements, and to submit reports on individual employee's contributions.

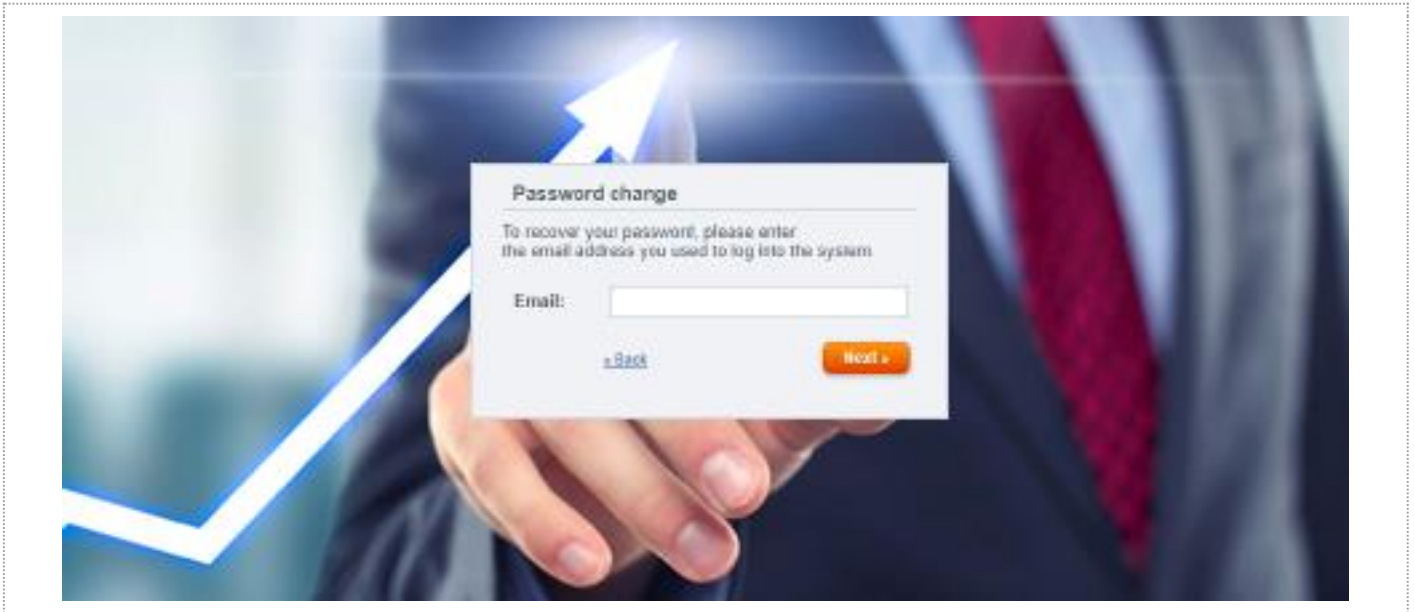
# 2. Login page

The Employer Panel can be used after logging in on a dedicated page. The page address is set individually for each employer. In order to log in correctly, you will need an email address and a password.



When the password is lost, you can use the password reminder link on the login page. In the form field, enter the email address to which the system will send a message with instructions to change the password. The address must be associated with an existing administrative account.

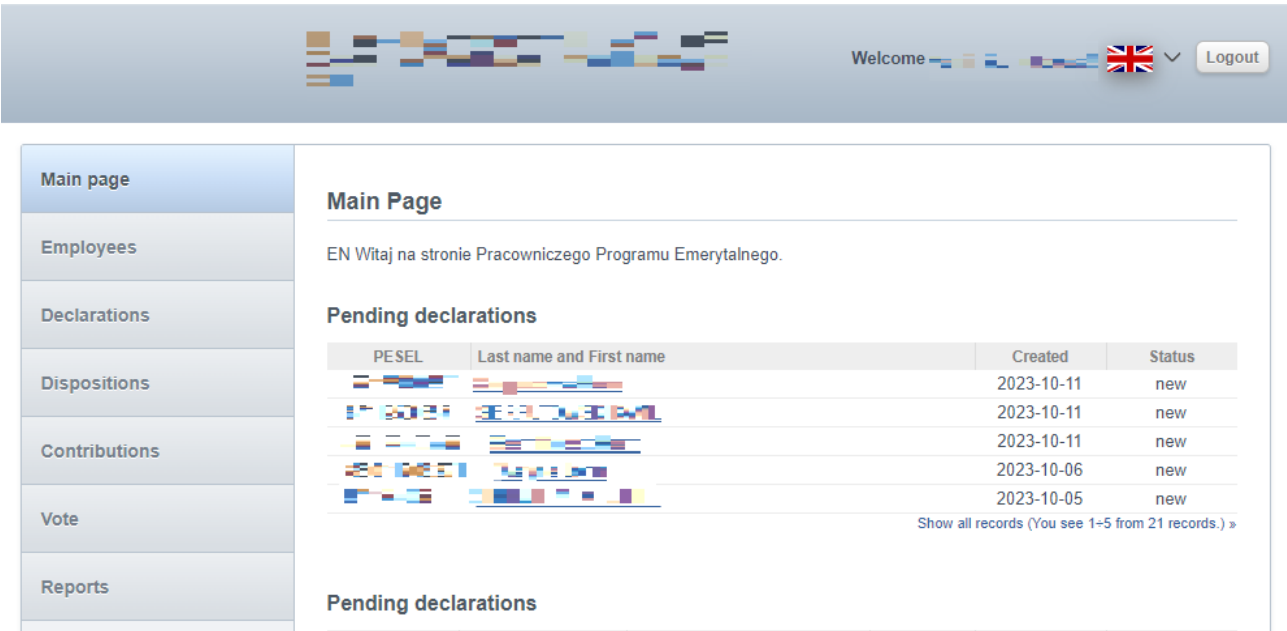




## 3. Employer Panel

After logging in, the Employer Panel is divided into three sections:

- top bar presenting summary information on the EPS and navigation tools (changing the password, switching between available EPS instances, logging out);
- navigation menu on the left side;
- contents of the selected menu item in the central part.



The screenshot displays the Employer Panel interface. At the top, there is a header bar with a logo on the left, a "Welcome" message in the center, a language selector (UK flag) on the right, and a "Logout" button. Below the header is a navigation menu on the left with items: "Main page", "Employees", "Declarations", "Dispositions", "Contributions", "Vote", and "Reports". The main content area is titled "Main Page" and contains a welcome message: "EN Witaj na stronie Pracowniczego Programu Emerytalnego." Below this is a section for "Pending declarations" with a table:

PESEL	Last name and First name	Created	Status
[blurred]	[blurred]	2023-10-11	new
[blurred]	[blurred]	2023-10-11	new
[blurred]	[blurred]	2023-10-11	new
[blurred]	[blurred]	2023-10-06	new
[blurred]	[blurred]	2023-10-05	new

Below the table, there is a link: "Show all records (You see 1+5 from 21 records.) »"



Where a logged-in user administers more than one EPS, on the top bar there will be the option to switch between available schemes (also referred to as EPS instances).

The screenshot shows the employer's panel interface. At the top, the header displays the program name: "Pracowniczy program Emerytalny Płatna Jesień Zakłady Mięsne Mortadelle w Konopieczu Dolnym z STI24". On the right, the user is logged in as "Witaj Wodnik Szuwarek!" with a "Wyloguj" button. A dropdown menu is open, showing the current instance "Testowa Instancja PPE z sti24" and two other options: "pso" and "test2". The main content area shows a sidebar with navigation options: "Strona główna", "Pracownicy", "Deklaracje", "Oświadczenia", "Listy Składek", "Głosowanie", and "Raporty". The main content area displays "Strona główna" with a welcome message and a section for "Oczekujące deklaracje" with a table header for "PESEL" and "Nazwisko i Imię", showing "Brak rekordów."

The program administrator has the possibility to manage the notifications sent from the elmpuls system, to change the settings click on your name on the top bar.

The screenshot shows the user profile settings page. The header features the "ProService Finteco" logo on the left, a "Welcome" message, a user name, a flag icon (UK), and a "Logout" button. The main content area is divided into a sidebar and a main section. The sidebar contains navigation options: "Main Page", "Employees", "Declarations", "Dispositions", "Contributions", and "Vote". The main section is titled "Your data" and contains the following information:

- First and last name:
- Email address:
- Password: (Change)
- Notifications: disabled
- Notifications about new documents requiring approval will not be sent. (Change)



## 4. Home page

The *home page* contains a welcome section and a list of new declarations to join EPS that must be accepted by the administrator. By selecting one of the records, you will go to the details view of the selected declaration.

<b>Main page</b>	<h3>Main Page</h3> <p>EN Witaj na stronie Pracowniczego Programu Emerytalnego.</p>																								
Employees																									
Declarations	<h3>Pending declarations</h3> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>PESEL</th> <th>Last name and First name</th> <th>Created</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>2023-10-11</td> <td>new</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>2023-10-11</td> <td>new</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>2023-10-11</td> <td>new</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>2023-10-06</td> <td>new</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>2023-10-05</td> <td>new</td> </tr> </tbody> </table> <p style="text-align: right;"><a href="#">Show all records (You see 1+5 from 21 records.) »</a></p>	PESEL	Last name and First name	Created	Status	[REDACTED]	[REDACTED]	2023-10-11	new	[REDACTED]	[REDACTED]	2023-10-11	new	[REDACTED]	[REDACTED]	2023-10-11	new	[REDACTED]	[REDACTED]	2023-10-06	new	[REDACTED]	[REDACTED]	2023-10-05	new
PESEL	Last name and First name	Created	Status																						
[REDACTED]	[REDACTED]	2023-10-11	new																						
[REDACTED]	[REDACTED]	2023-10-11	new																						
[REDACTED]	[REDACTED]	2023-10-11	new																						
[REDACTED]	[REDACTED]	2023-10-06	new																						
[REDACTED]	[REDACTED]	2023-10-05	new																						
Dispositions																									
Contributions																									
Vote																									
Reports																									
	<h3>Pending declarations</h3> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>PESEL</th> <th>Last and first name</th> <th>Declaration Type</th> <th>Source</th> <th>Created</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>Authorized Persons Data Change</td> <td>elmpuls</td> <td>2023-10-25</td> <td>complete</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>Attorney Data Change</td> <td>elmpuls</td> <td>2023-10-16</td> <td>complete</td> </tr> <tr> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>Taxpayer Declaration</td> <td>elmpuls</td> <td>2023-10-11</td> <td>complete</td> </tr> </tbody> </table>	PESEL	Last and first name	Declaration Type	Source	Created	Status	[REDACTED]	[REDACTED]	Authorized Persons Data Change	elmpuls	2023-10-25	complete	[REDACTED]	[REDACTED]	Attorney Data Change	elmpuls	2023-10-16	complete	[REDACTED]	[REDACTED]	Taxpayer Declaration	elmpuls	2023-10-11	complete
PESEL	Last and first name	Declaration Type	Source	Created	Status																				
[REDACTED]	[REDACTED]	Authorized Persons Data Change	elmpuls	2023-10-25	complete																				
[REDACTED]	[REDACTED]	Attorney Data Change	elmpuls	2023-10-16	complete																				
[REDACTED]	[REDACTED]	Taxpayer Declaration	elmpuls	2023-10-11	complete																				



Besides a list of new statements may appear on the Home Page, which also require approval from the administrator. The table identifies the source of the submitted instruction:

E-Impulse: instructions entered in the employer module via an instruction link generated from this application.

STI: instructions entered in the employee module (Transaction Service). For instructions entered in the Transaction Service, it is possible to enable automatic confirmation of instructions. To do this, contact your account manager at Generali Investments TFI.

Selecting one of the records from the list takes you to the view of the details of the selected statement regardless of the source/place of submission.

If there are declarations and statements in elmpuls that require program administrator approval, automatic notifications are sent to all administrators in the morning of each business day.

If your employee wants to access the free Transaction Service with the possibility of verifying the value of contributions made and making orders and instructions provide the employee with a link: <https://www.generali-investments.pl/contents/display-article/klient-indywidualny/prosty-i-bezpieczny-dostep-online-do-twoich-inwestycji>

The screenshot displays the 'List of Dispositions' interface. On the left is a sidebar with navigation links: 'Main page', 'Employees', 'Declarations', 'Dispositions', 'Dispositions list', 'Links to fulfill', and 'Links dispatch'. The main content area has three buttons at the top: 'New Declaration', 'Accept selected', and 'Open selected as PDF'. Below these is the title 'List of Dispositions' and a search filter box. The filter box contains fields for 'Created from:', 'to:', 'Search:', 'Type:', and 'Status:', along with a 'Filter' button. Below the filter, it says 'You see 1+25 from 129 records.' and has a pagination control showing '1 2 3 4 5 6'. A table below shows the list of dispositions with the following columns: PESEL, Last and first name, Declaration Type, Source, Created, and Status. The first row of data shows: PESEL (represented by a color bar), Last and first name (represented by a color bar), Declaration Type: 'Participant Data Change', Source: 'elmpuls', Created: '2023-10-25', and Status: 'in progress (25%)'.

## 5. Employees

### 5.1 List of employees

The *Employees* module is used to manage the list of employees covered by the EPS. Each record is identified by PESEL number.



Employee number / PESEL	Last name and First name	Declaration	Voted	Active
[blurred]	[blurred]	2013-03-27	2013-01-03	yes
[blurred]	[blurred]	2015-06-16	no	yes
[blurred]	[blurred]		no	yes
[blurred]	[blurred]		no	yes
[blurred]	[blurred]		2013-01-15	yes

The list can be sorted. To do this, click the column header, which will result in sorting according to the selected criterion. The list can also be filtered by:

**SEARCH**

searching by first name, last name or PESEL number

**POLL STATUS**

whether the employee has attended the polls

**ACTIVE STATUS**

whether the employee is active

## 5.2 Adding a new employee

When adding a new employee, the required fields are first name, last name and PESEL number. Other data is not mandatory, but without such data as, for example, an email address, it will not be possible to grant access to available STI24 EPS instance.





[Back](#)   [Save](#)

## Employee Details

---

### Employee Details

Employee number:

PESEL:

First name:

Second name:

Last name:

Email address:

Active:  employee is active



## 5.3 Employee details

After selecting a record from the list of employees, you will go to the employee details view. The first section contains the personal data and contact details of the selected person. The next sections contain information about the declaration of joining the EPS/Systematic Savings Plan (SSP) and agreements concluded. If the Poll module has been enabled within the scheme, the section related to the polls attended by the given employee will be shown.

Back
Save
Delete

### Employee Details

---

**Employee Details**

Employee number:

PESEL:

First name:

Second name:

Last name:

Email address:

Active:  employee is active

**Declaration**

Declaration to fill Link: <https://demo-ppk.kpoint.pl/test/ppe-creator?id=1&token=a1bad1162>

Send date: *Not sent yet.* [Email the link](#)

Completed	Date	Document number	Status
Declarations:	2013-03-27	<a href="#">008130327000100019</a>	wysłana do PSAT

**PPE agreement details**

No information about the signed agreement.

**Voting Module**

Link sent: *Not sent yet.* [Email the link](#)

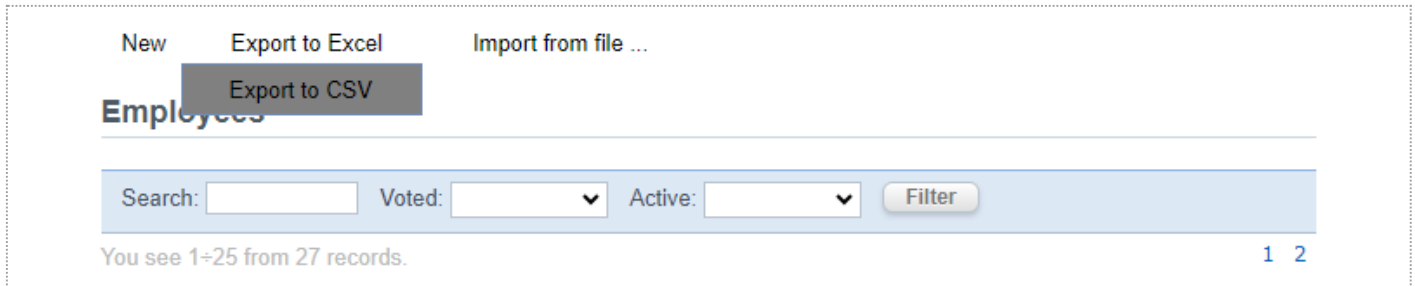
Note: after changing the email address in the employee details, you must send the link again. The voting link is generated, among others, on the basis of the email address.

Vote cast: The Employee cast his vote on 2013-01-03 at 13:58.



## 5.4 Exporting the list of employees

The list of employees can be exported to an Excel or CSV file, as below.



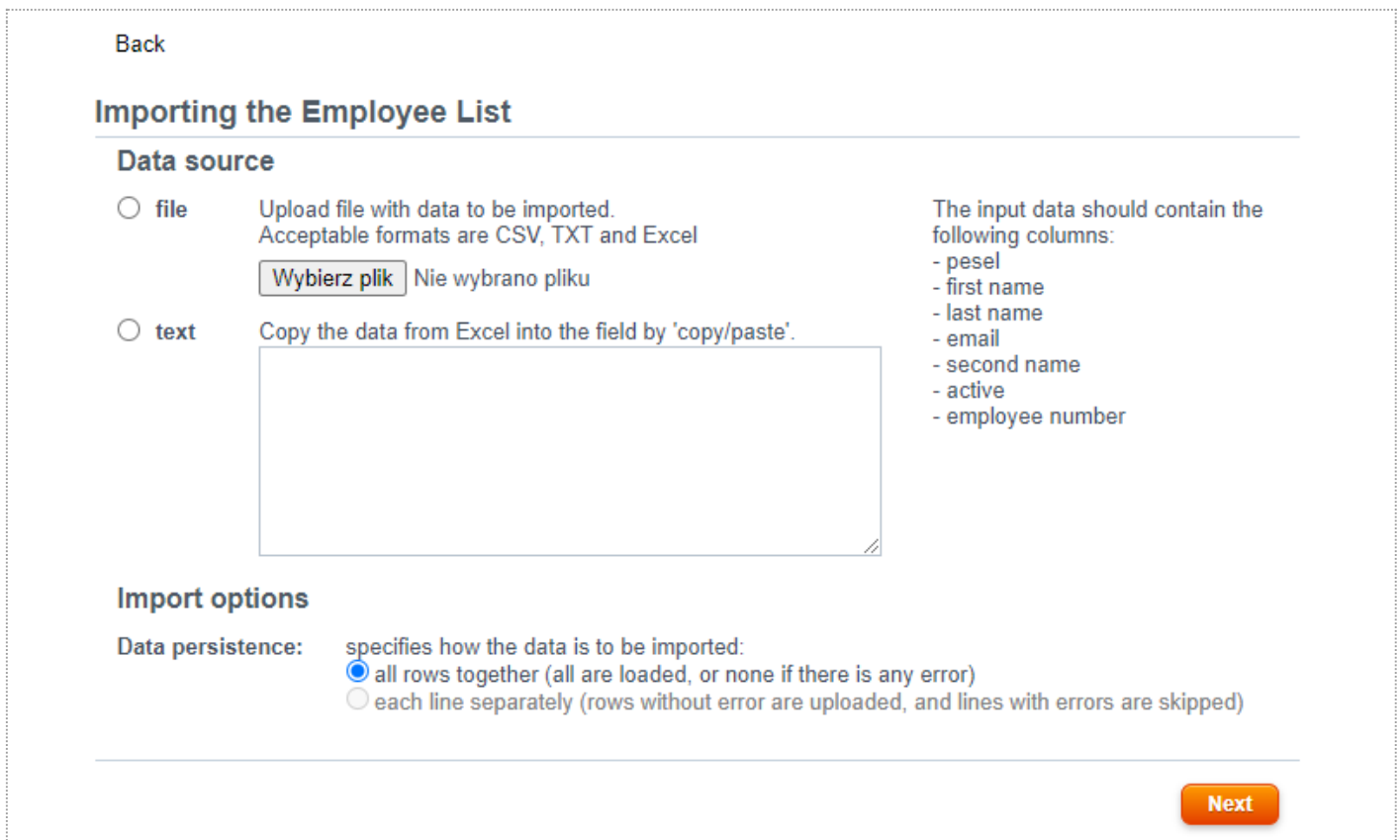
The screenshot shows the 'Employees' management interface. At the top, there are three buttons: 'New', 'Export to Excel', and 'Import from file ...'. The 'Export to CSV' button is highlighted with a grey background. Below the buttons, there is a search bar with the text 'Search:' and a 'Filter' button. The search bar contains the text 'Voted:' and 'Active:'. Below the search bar, there is a pagination bar that says 'You see 1-25 from 27 records.' and a page number '1 2'.

## 5.5 Importing the list of employees

The list of employees can be imported using a CSV, TXT or Excel file. When importing, attention must be paid to the correct data and their appropriate structure (appropriate names of columns indicated in the import window - as below).

### STEP 1

In step one, select the source from which the data will be imported.



The screenshot shows the 'Importing the Employee List' window. At the top, there is a 'Back' button. Below it, the title 'Importing the Employee List' is displayed. Under the title, there is a section 'Data source' with two radio buttons: 'file' and 'text'. The 'file' option is selected. Below the 'file' option, there is a button 'Wybierz plik' and the text 'Nie wybrano pliku'. Below the 'text' option, there is a large text area for pasting data. To the right of the 'Data source' section, there is a list of required columns: 'pesel', 'first name', 'last name', 'email', 'second name', 'active', and 'employee number'. Below the 'Data source' section, there is a section 'Import options' with a 'Data persistence:' label and two radio buttons: 'all rows together (all are loaded, or none if there is any error)' and 'each line separately (rows without error are uploaded, and lines with errors are skipped)'. At the bottom right, there is a 'Next' button.

### STEP 2



In step two, the system will pre-import the data and show the recognized columns. If there are no errors at this stage, it will be possible to start the actual import. If problems are detected, they must be removed and the import process must be started from the beginning.

### Importing the Employee List

#### Preview of the data to be imported

Review the data to make sure that the system correctly read the uploaded file. The first few records are displayed below.

pesel	first name	last name	email	second name	active	employee number
41121831508	Kamil	Testowy	kamil.testowy@gmail.com		Yes	

Back Start import

### STEP 3

Step three allows to preview the import process. If at this stage the system detects errors in the imported data, they will be listed.

Back

### Importing the Employee List

#### Importing

100%

Importing: {second name=null, employee number=null, last name=Testowy, first name=Kamil,...

Row #1: Employee number is required.  
Nr błędu: 9962bedf-929e-4fde-abf5-80244e6a91ba

Back

If there are errors, return to the previous step, correct the indicated records in the file and re-import. Repeat the operation until the loading is successful, i.e. there are no errors (as below).



Back

## Importing the Employee List

### Importing

100%

Imported records: 1, import time: 6 ms

---

Back
OK

## 6. Declarations

The Declarations module allows to manage declarations for joining the EPS.

### 6.1 List of declarations

List of declarations presents a list of all declarations submitted by employees under the EPS.

- Main page
- Employees
- Declarations
- Declarations list
- Settings
- Link to fulfill
- Link dispatch
- Dispositions
- Contributions
- Vote
- Reports

Accept selected
Cancel selected
Open selected as PDF
Export to Excel

### List of Declarations

Search: 
Created from:

Status: 
to: 
Filter




You see 1+25 from 44 records. 1 2

PESEL	Last name and First name	Created	<input type="checkbox"/> Status
		2023-10-11	<input type="checkbox"/> new
		2023-10-11	<input type="checkbox"/> new
		2023-10-11	<input type="checkbox"/> new
		2023-10-06	<input type="checkbox"/> new
		2023-10-05	<input type="checkbox"/> new
		2023-10-04	<input type="checkbox"/> new
		2023-10-04	<input type="checkbox"/> send to AT
		2023-10-02	<input type="checkbox"/> send to AT
		2019-05-15	<input type="checkbox"/> new
		2019-04-26	<input type="checkbox"/> new
		2019-03-01	<input type="checkbox"/> send to AT
		2019-02-26	<input type="checkbox"/> send to AT
		2018-09-25	<input type="checkbox"/> send to AT



The list can be sorted by clicking on the column header: *PESEL*, *First name/Last name*, *Created* and *Status*.

The list view can be filtered by:

 <p><b>SEARCH</b></p> <p>searching by first name, last name or PESEL number</p>	 <p><b>CREATED FROM/TO</b></p> <p>by the document creation date</p>	 <p><b>STATUS</b></p> <p>by the current status of the document</p>
--	--	---

Actions available from the list:

- Accept selected - accepting selected documents (selected in the Status column);
- Cancel selected - cancelling selected documents (selected in the Status column);
- Open selected in PDF - generating the selected documents (selected in the Status column) into a PDF file;
- Export to Excel/CSV - generating the current list and saving it to an Excel or CSV file.

Accept selected    Cancel selected    Open selected as PDF    Export to Excel

### List of Declarations

Search:     Created from:   
Status:     to:    

You see 1-25 from 44 records. 1 2



## 6.2 Declaration details

After selecting a record from the list of declarations, you will go to the declaration details view. The first section contains details of the document (number, creation date, current status). The next sections contain other information about the declaration (depending on the completeness of filling). From the details view, the declaration can be opened in print preview or directly as a PDF file (buttons on the top action bar).

← Back Save Open as PDF

### Declaration Details

---

**Declaration Details**

Document number: 015240618040700262  
 Created: 2024-06-18 13:58 (via intranet)  
 Status: new

**Employee personal information**

First name	<input type="text" value="anna"/>	Second name	<input type="text"/>
Last name	<input type="text" value="nowak"/>		
PESEL number	<input type="text" value="71020227146"/>	Gender	<input type="text" value="female"/>
Date of birth	<input type="text" value="1971-02-02"/>		
Country of birth	<input type="text" value="Poland"/>		
Citizenship	<input type="text" value="Poland"/>		

**ID document**

Type	<input type="text" value="identity card"/>	Country	<input type="text"/>
Number	<input type="text" value="TVJ714001"/>	Country	<input type="text" value="Poland"/>
Date of issue	<input type="text" value="2024-06-03"/>		
Validity date	<input type="text" value="-- not specified --"/>		<input checked="" type="checkbox"/> open-end document

**Permanent residence**

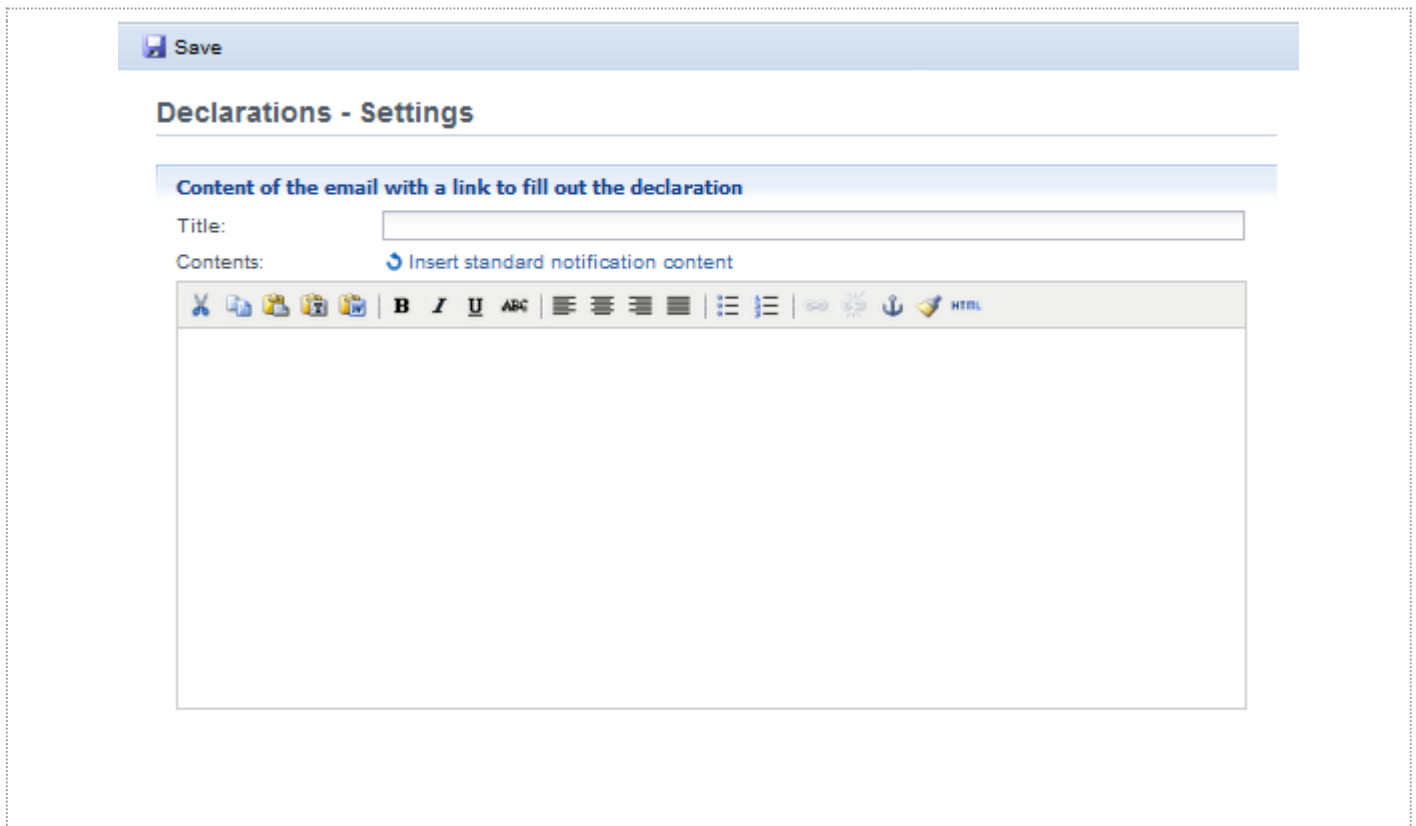
Street/town	<input type="text" value="kolorowa"/>	Building no.	<input type="text" value="3"/>	Apartment no.	<input type="text"/>
Postal code	<input type="text" value="01-200"/>	Place	<input type="text" value="Warszawa"/>		
Country	<input type="text" value="Poland"/>				
Telephone number	<input type="text"/>				
Email	<input type="text"/>				



## 6.3 Settings

On the *Settings* page, the content of a notification to the employee and an invitation to complete the declaration can be set. The notification content editor provides standard text editing tools, including: bold, italics, justification, bullets, hyperlinks, etc. You can use “hash-parameters” in the notification content, which will be converted into the relevant data when the notification is sent:

- #employee.first\_name#;
- #employee.last\_name#;
- #decalration\_link#.



The screenshot displays the 'Declarations - Settings' interface. At the top, there is a 'Save' button. Below it, the title 'Declarations - Settings' is shown. The main section is titled 'Content of the email with a link to fill out the declaration'. It includes a 'Title:' field and a 'Contents:' field. The 'Contents:' field has a link to 'Insert standard notification content'. Below the 'Contents:' field is a rich text editor toolbar with icons for copy, paste, undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and HTML. The editor area is currently empty.

## 6.4 Link to submit declarations

The *Link to submit declarations* page displays a link to the form for submitting the EPS/SSP declaration. This link can be used in any way, e.g. it can be pasted into the corporate intranet.





### Declarations - Link to submit a declaration

To enable employees to fulfill the Declarations, provide them with the following link:

<https://demo-ppk.kpoint.pl/test/ppe-creator>

## 6.5 Sending of links

The *Sending of links* page provides a tool for sending invitations to fill in the declaration to join the EPS/SSP. The content of the notification is configured on the *Settings* page. There are three modes of sending invitations available:

- to the employees who have not yet filled in the declaration and to whom the link has not been sent;
- to the employees who have not filled in the declaration (regardless of whether the link has been sent or not);
- on a test basis to the email address provided.

### Declarations - Link dispatch

With this action, you can send emails to employees with links to fill out Declarations. Every employee will receive an email with individually assigned link.

#### Recipients:

- to employees, who did not fill out the Declarations and the Link was not sent  
(number of such employees: 19)
- to employees, who did not fill out the Declarations (no matter if the Link was sent or not)  
(number of such employees: 23)
- to given email address, for testing purposes only:

Send links to employees

## 7. Statements

The Statements module allows to manage statements submitted under the EPS/SSP.

Distinction between a declaration and a statement:

- A **declaration** is made by an employee to join the EPS/SSP. As a result of the employee's submission of the declaration and its subsequent acceptance by the EPS administrator, the declaration goes to the Financial Institution (Investment Fund Company). There, based on the declaration, an EPS/SSP participation agreement is created.
- A **statement** is made by an employee to update the data in the participation agreement or to change the terms of the agreement. A statement can be submitted by the scheme administrator on behalf of the employee. After the statement has been accepted by the scheme administrator, it goes to the Financial Institution.



There are several types of statements. Each type is used to change a different range of data/parameters in the agreement.



## 7.1 List of statements

The *Statements* page presents a list of all statements submitted under the given EPS/SSP. This list is analogous to the list of declarations.

The screenshot shows the 'List of Dispositions' page. At the top, there are three buttons: 'New Declaration', 'Accept selected', and 'Open selected as PDF'. Below these is the title 'List of Dispositions'. A search filter is present with fields for 'Created from:', 'to:', 'Search:', 'Type:', and 'Status:', along with a 'Filter' button. Below the filter, it says 'You see 1-25 from 129 records.' and a pagination control '1 2 3 4 5 6'. The main part of the page is a table with the following columns: PESEL, Last and first name, Declaration Type, Source, Created, and Status. The table contains five rows of data, each with a checkbox in the first column.

	PESEL	Last and first name	Declaration Type	Source	Created	Status
<input type="checkbox"/>	[PESEL]	[Name]	Participant Data Change	elmpuls	2023-10-25	in progress (25%)
<input type="checkbox"/>	[PESEL]	[Name]	Authorized Persons Data Change	elmpuls	2023-10-25	complete
<input type="checkbox"/>	[PESEL]	[Name]	Attorney Data Change	elmpuls	2023-10-16	complete
<input type="checkbox"/>	[PESEL]	[Name]	Taxpayer Declaration	elmpuls	2023-10-11	complete
<input type="checkbox"/>	[PESEL]	[Name]	Limits Change	elmpuls	2023-10-11	complete

The list can be sorted by clicking on the column header: *PESEL*, *Type of statement*, *Source*, *Created* and *Status*.

Available options for filtering the list:

- Search - searching by the employee's first name, last name or PESEL number;
- Created from/to - by the document creation date;
- Type - by the type of statement;
- Status - by the current status of the statement.

Actions available:

- New statement - creating a new statement on behalf of the employee by the scheme administrator. To create a relevant statement, the type of statement must be selected.
- Accept selected - accepting selected documents (selected in the first column);
- Cancel/Cancel selected - cancelling selected documents (selected in the first column);
- Open selected in PDF - generating the selected documents (selected in the first column) into a PDF file;
- Export to Excel/CSV - generating the current list and saving it to an Excel or CSV file.

Source of the channel for the statement:

- elmpuls - statement made via a link from the elmpuls system;
- STI24 - statement made online via the Transaction Service for participants.

Status of statements:

- cancelled - rejected by the program administrator
- complete / awaiting - submitted, awaiting approval by the program administrator



- in progress - started by the program administrator
- accepted - accepted by the program administrator
- sent to PSAT - forwarded to transfer agent (PSAT).



## 7.2 Statement details

After selecting a record from the list, you will go to the statement details view. The view may vary depending on the status of the statement.

### STATEMENTS “IN PROGRESS”

If a statement has been initiated by the scheme administrator, it will be in the “in progress” status until submitted. The administrator can any time interrupt the multi-step process of filling in the statement and then return to filling it in.

In this mode, an incomplete statement can be filled in or deleted, if necessary (button on the top action bar).

### Participant Data Change

**Step 1**  
Employee Identification

**Step 2**  
New Employee's personal data

**Step 3**  
Agreements & Declarations

**Step 4**  
Summary

**Step 5**  
Printout of declaration

### Summary

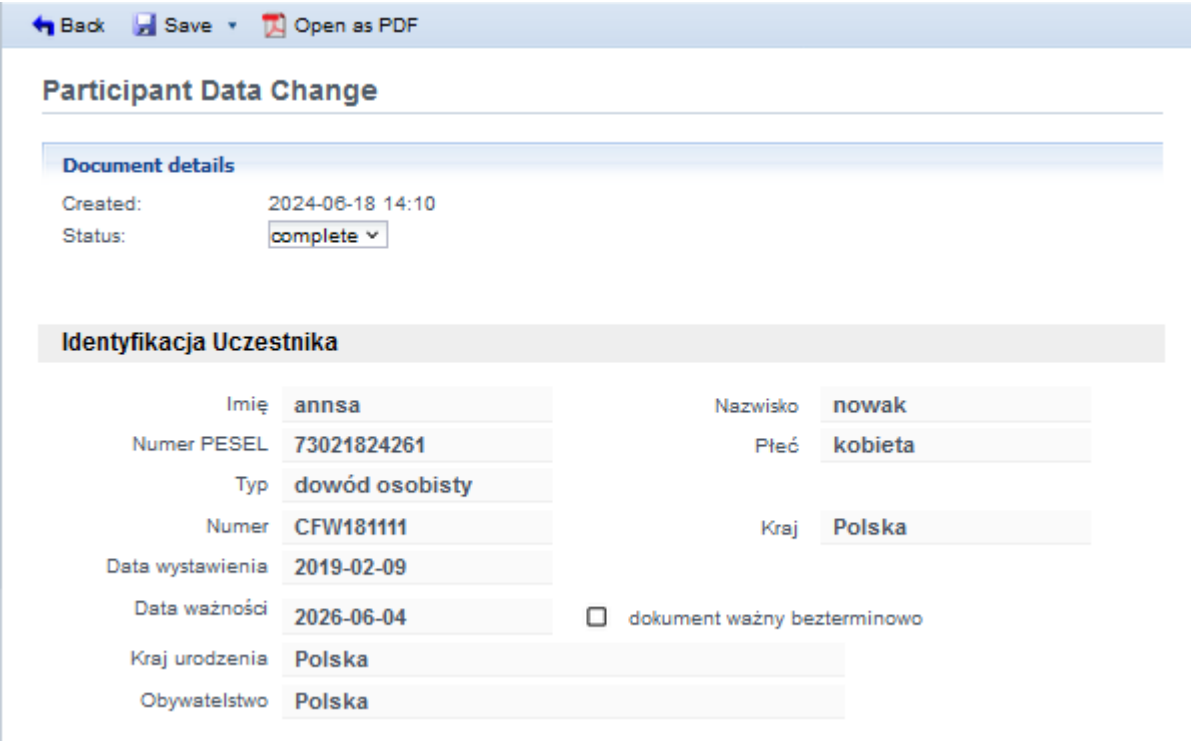
**Employee Identification**

First name	<input type="text" value="anna"/>	Last name	<input type="text" value="nowak"/>
PESEL number	<input type="text" value="73021824261"/>	Gender	<input type="text" value="female"/>
Type	<input type="text" value="identity card"/>		
Number	<input type="text" value="CFW181111"/>	Country	<input type="text"/>
Date of issue	<input type="text" value="2024-06-03"/>		
Validity date	<input type="text" value="2025-06-08"/>	<input type="checkbox"/> open-end document	
Country of birth	<input type="text"/>		
Citizenship	<input type="text" value="Poland"/>		



## STATEMENTS SUBMITTED

If the statement is submitted, the statement details page will present all the information contained in it. The administrator can change the status of such statement (accept or reject it). The administrator can also download the content of the statement as a PDF file.



The screenshot displays a web interface for managing participant data. At the top, there are navigation buttons: 'Back', 'Save', and 'Open as PDF'. The main heading is 'Participant Data Change'. Below this, there is a 'Document details' section with the following information:

- Created: 2024-06-18 14:10
- Status: complete (dropdown menu)

The next section is 'Identyfikacja Uczestnika' (Participant Identification), which contains the following fields:

Imię	annsa	Nazwisko	nowak
Numer PESEL	73021824261	Płeć	kobieta
Typ	dowód osobisty	Kraj	Polska
Numer	CFW181111		
Data wystawienia	2019-02-09		
Data ważności	2026-06-04	<input type="checkbox"/>	dokument ważny bezterminowo
Kraj urodzenia	Polska		
Obywatelstwo	Polska		

## 7.3 Link to submit statements

On the *Link to submit statements* page, there is a list of links to pages where an employee can submit a statement. This list can be used in any way, e.g. it can be pasted into the corporate intranet.



## Dispositions - Links to fulfill

To enable employees to complete their declarations, provide them with the following links

- **Participant Data Change**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=zdu](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=zdu)
- **Authorized Persons Data Change**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=zdown](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=zdown)
- **Payoff Statement**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=payoff](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=payoff)
- **Transfer Payment**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=wt](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=wt)
- **Allocation Change**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=za2](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=za2)
- **Additional Contribution Value Change**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=zsd](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=zsd)
- **Declaration Of Participation Change**  
Link: [http://eimpuls.psat.pl/ppe\\_\\_\\_\\_\\_express/doc-creator?type=zpd](http://eimpuls.psat.pl/ppe_____express/doc-creator?type=zpd)

## 7.4 Sending of links

The *Sending of links* page provides a tool for sending invitations with links to fill in the statements. In the first part, there is a list for selecting the statements to which links are to be included in the content of the message. In the addressees field, the addresses to which the message will be sent must be entered, separated by a comma or semicolon. The content of the message can be edited in the last part of the page, using the WYSIWYG editor.

Available “hash-parameters”:

- #links# - this parameter will be replaced with addresses, in the form of a list, to the selected statements.



 Save

## Declarations - Link dispatch

Using this page, you can send employees an email with links to complete the declarations.

### Links to send

- Participant Data Change
- Authorized Persons Data Change
- Payoff Statement
- Transfer Payment
- Allocation Change
- Additional Contribution Value Change
- Declaration Of Participation Change

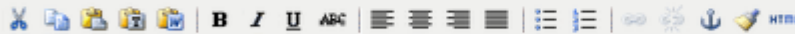
### Recipients

In the field below, enter the e-mail addresses (separated by commas or semicolons) to which e-mails with links to the selected declarations will be sent.

### Email content

Title:

Contents: [Insert standard notification content](#)



Witaj,

W związku z możliwością składania Oświadczeń w ramach Pracowniczego Programu Emerytalnego ..... przesyłamy Ci linki, za pomocą których możesz online złożyć stosowne oświadczenia:

#linki#

Pozdrawiamy,  
Zespół HR.

---

Ten email został wygenerowany automatycznie. Prosimy na niego nie odpowiadać.

The list of links will be inserted in the place marked as #linki# .

[Email the links](#)

## 7.5 Statements made on the Transaction Service

After logging in to the Transaction Service, the participant has the possibility of making the following statements:

- data change,
- adding/changing authorized people in case of death,





- withdrawal upon reaching age 60 or acquiring pension rights upon reaching age 55,
- changing the parameters of the withdrawal (including frequency of installment payments, number of installments, change of disposition from installment payment to single payment),
- change of allocation (investments and contributions),
- transfer withdrawal to another PPE or IKE.

The submitted statement is transmitted to the elmpuls system and requires approval of the program administrator.








The employer running the scheme may give the Management Company a power of attorney to automatically accept statements made through the Transaction Service.

Subject to the sentence below, transfer withdrawal to another PPE or IKE, requires each time approval in the elmpuls system by the program administrator, who confirms the termination of the participant's employment with the company.

In order for an employee to access the Transaction Service, the administrator of the PPE program provides the employee with a link to set up a free account on his/her own: <https://www.generali-investments.pl/contents/display-article/klient-indywidualny/prosty-i-bezpieczny-dostep-online-do-twoich-inwestycji>

## 8. Lists of contributions

The *Lists of contributions* page presents a view of the list of contributions. By default, the list is sorted by the creation date. The last two columns show the number of items and the total sum of contributions for the given item. The list can be sorted by clicking on the column header: *Created* and *Status*.

Main page	New Contributions List PPE			
Employees	Contributions Lists			
Declarations	You see 1-25 from 51 records.			1 2 3
Dispositions	Created / Status	List description	Records	Sum of contributions
Contributions	2023-10-04 new	 <a href="#">No description</a> Due list PPE	1	0.00
Vote	2023-10-02 new	 <a href="#">No description</a> Due list PPE		
Reports	2019-02-21 new	 <a href="#">No description</a> Due list PPE		
	2019-02-21 new	 <a href="#">No description</a> Due list PPE		
	2018-12-19 new	 <a href="#">No description</a> Due list PPE		
	2018-10-01 new	 <a href="#">No description</a> Due list PPE		
	2017-04-13 new	 <a href="#">No description</a> Due list PPE		

Actions available from the list:

- New EPS list - creating a new list of contributions ([for more information see section 8.2](#)).



## 8.1 List of contributions details

After selecting one of the records in the list of contributions, you will go to the list details view. Depending on the current status of the list, you will be able to edit it (new list) or just preview it (accepted or sent list). The first part of the view contains the details of the list, including: creation date, type, description, status, etc. The contributions section contains records with personal data and contribution amounts. In the last part, there is a chronological history, which contains all logged records for the current list.

Back
Clone
Open as PDF
Export to Excel

### Contributions List Details PPE

---

**List Details**

Created: 2017-03-21 by

Type: Due list PPE

Description:   
In this field, you can enter a description of the created list, e.g. "Contributions for August".

Status: send

**Contributions**

	First name	Last name	Pesel	Date of birth	Basic contribution	Extra contribution
1	Wacław	Wolfejko	80022214959	22-02-1980	500,00 PLN	100,00 PLN
2	Roman	Kandyd	73010911972	09-01-1973	750,00 PLN	200,00 PLN

**History**

2017-03-21	16:25	System	Status changed to 'send'.
	16:25	System	Contributions list send to AT as 8_0001_20170321_1.PPEE20.pgp.
	16:25	System	Cotributions list accepted.

Actions available:

- Clone - creating a copy of the list shown;
- Open in PDF - generating the selected list into a PDF file;
- Delete - deleting the current list (only with the “new” status);
- Import from file - importing records using the import wizard (for more information see subsection “Creating a new list of contributions”);
- Export to Excel/CSV - saving the current list of contributions to an Excel or CSV file.

## 8.2 Creating a new list of contributions


From the *List of contributions* page, a *New PPE list* action can be selected. Each list should be given a unique name to clearly identify the period it covers. In the *Contributions* section, more records can be added manually or by pasting records from an Excel file, for example.



### Contributions List Details PPE

---

**List Details**

Created: 2023-10-25 by 

Type: Due list PPE

Description:   
In this field, you can enter a description of the created list, e.g. "Contributions for August".

Status:

**Contributions**

	First name	Last name	Pesel	Date of birth	Basic contribution	Extra contribution
1						

## 8.3 Importing the list of contributions

On the *List of contributions details* page, after selecting the “Import from file” button, a tool will open to import list of contributions records from an Excel, CSV or TXT file. Attention must be paid to the correct data and their appropriate structure (appropriate names of columns).

### Importing the List of Contributions

---

**Data source**

**file** Upload file with data to be imported.  
 Acceptable formats are CSV, TXT and Excel

Nie wybrano pliku

**text** Copy the data from Excel into the field by 'copy/paste'.

The input data should contain the following columns:

- pesel
- first name
- last name
- date of birth
- basic contribution
- extra contribution

**Import options**

**Data persistence:** specifies how the data is to be imported:

all rows together (all are loaded, or none if there is any error)

each line separately (rows without error are uploaded, and lines with errors are skipped)

If there are errors during import, correct the indicated records and re-import, like for “*Importing the list of employees*” ([section 5.5](#)).



## 9. Vote

The Vote module is used to vote for employee council members and is an optional module. It is available only to selected employers.

### 9.1 List of candidates

The *Candidates* page includes the list of candidates available during the poll process. It can be sorted by clicking on the column header: *First name/Last name* and *Number of votes*. The list view can be filtered by (Search) - searching by the candidate's first and/or last name.

Last name and First name	Vote count
[Redacted]	0
[Redacted]	1
[Redacted]	0
[Redacted]	1
[Redacted]	10
[Redacted]	0

Actions available:

- New - adding a new candidate;
- Export to Excel/CSV - generating the current list and saving it to an Excel or CSV file.



## 9.2 Candidate details

After selecting one of the records in the list of candidates, you will go to the candidate details view. Here, the basic data can be entered, such as: first (middle) name, last name and additional description. The description will be displayed below the candidate's name on the ballot.

[Back](#)   [Save](#)   [Delete](#)

### Vote - Candidate Details

---

**Candidate Details**

First name:

Second name:

Last name:

Additional description:

## 9.3 Settings

The *Settings* page contains a panel designed to configure the poll process. The following must be set: the poll start and end date, the look of the voting page and the content of an email invitation.

The following “hash-parameters” can be used in the content of the invitation:

- #employee.first\_name#;
- #employee.last\_name#;
- #instance.poll\_end\_date#;
- #vote\_link#.



Save    Voting page preview    Voting reset

### Vote - Settings

---

**Basic settings**

Start date:

End date:

Active:  voting is active, available to employees

**Voting page view**

Vote name:

Introduction: 

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus augue purus, gravida nec vehicula eu, sollicitudin ut sapien. Aliquam erat volutpat. Donec vel justo at diam mollis porttitor at at mi. Sed tincidunt volutpat iaculis. Pellentesque bibendum convallis tellus at pharetra. Quisque eget ullamcorper orci. Proin pretium tempus consequat. Donec vestibulum interdum neque, eu pharetra tellus mattis eu. Maecenas risus ipsum, vehicula nec egestas vel, rhoncus sit amet ante.

Mauris vel arcu id sapien volutpat posuere eu vel ante. In sed erat ligula. Sed ullamcorper lorem vitae tortor dapibus condimentum eu blandit elit. Vivamus consectetur turpis id nisl porta aliquet. Pellentesque habitant morbi tristique senectus et netus et

**Content of the email with the voting link**

Title:

Contents: [Insert standard notification content](#)

Actions available from the view:

- Preview the vote page - previewing the ballot;
- Reset the vote - resetting the results of the current poll.

## 9.4 Preview the vote page

From the poll settings page, after selecting the *Vote page preview* action, the ballot view page will open.



### Głosowanie Na Członków Rady Pracowniczej

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Vivamus augue purus, gravida nec vehicula eu, sollicitudin ut sapien. Aliquam erat volutpat. Donec vel justo at diam mollis porttitor at at mi. Sed tincidunt volutpat iaculis. Pellentesque bibendum convallis tellus at pharetra. Quisque eget ullamcorper orci. Proin pretium tempus consequat. Donec vestibulum interdum neque, eu pharetra tellus mattis eu. Maecenas risus ipsum, vehicula nec egestas vel, rhoncus sit amet ante.

Mauris vel arcu id sapien volutpat posuere eu vel ante. In sed erat ligula. Sed ullamcorper lorem vitae tortor dapibus condimentum eu blandit elit. Vivamus consectetur turpis id nisl porta aliquet. Pellentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Quisque mollis mi et mi imperdiet ultricies. In hac habitasse platea dictumst. Pellentesque aliquet scelerisque purus, in elementum turpis ultrices eget. In sed metus et erat porta facilisis et in augue. Proin pharetra tortor odio. Integer eget augue eu magna pharetra tempor. Quisque ut aliquam metus.

#### Magdaleńska Magdalena

Jedyna kobieta wśród wszystkich kandydatów.

#### Mateuszewski Mateusz Marek

Głosując na mnie wspierasz POSTĘP!

#### Mier Greg

Tak, ona tu jest, uwielbiam ją i tańczy dla mnie

#### Wiesławski Wiesław

## 9.5 Sending of links

From the Sending of links page, invitations to the vote can be sent. There are three modes of sending messages available:

- to the employees who have not yet voted and to whom the link has not been sent;
- to the employees who have not voted (regardless of whether the link has been sent or not);
- on a test basis to the email address provided.

## Vote - Link dispatch

With this action, you can send emails to employees with links to the voting page. Each employee will receive an e-mail with an individually assigned link, thanks to which we can distinguish between voters and determine whether they voted or not.

At the moment, the voting statistics are as follows:

The number of all active employees:	28
The number of employees who have already voted:	12
The number of employees who have not yet voted:	16
The number of employees to whom an email with a voting link has already been sent:	17
The number of employees to whom an email with a voting link have not yet been sent:	11

### Recipients:

- to employees who did not vote and no link was sent (number of such employees: 10)
- to employees who did not vote (regardless of whether the link was already sent or not) (number of such employees: 16)
- to given email address, for testing purposes only:

Send links to employees

## 10. Reports

The *Reports* page includes a list of available reports. Reports are made available as downloadable Excel or CSV files. The Reports module is available only to selected employers.

Main page	<h3>List of available reports</h3> <hr/> <p><b>Declarations with an extra contribution Report</b></p> <p>The report contains data for the day 2023-10-25 09:39 from declarations and statements where status is 'sent' or 'accepted'.</p> <p> <input type="button" value="Export to Excel"/> <input type="button" value="Export to CSV"/> </p>
Employees	
Declarations	
Dispositions	
Contributions	
Vote	
Reports	

A sample content of an Excel report:







	A	B	C	D	E	F	G	H	I	J	K
1	Produkt	Imię	Nazwisko	Pesel	Data urodzenia	Data akceptacji	Dek. typ składki	Deklaracja	Dek. wys. składki	Oświadczenie	Ośw. zmiana wys. składki
2	PPE developerskie	Jan	Nowotko	75073060338	1975-07-30	2013-08-12 11:41	%	tak	10		
3	PPE developerskie	Anna	Test	80122328949	1980-12-23	2015-06-15 14:42	%	tak			
4	PPE developerskie	Tadeusz	Test	67080903199	1967-08-09	2015-11-03 08:51	%	tak			
5	PPE developerskie	Jan	Test	76010319955	1976-01-03	2015-11-02 15:50	%	tak			

## 11. Submitting a declaration

Each employer participating in the EPS/SSP is provided with an individual link through which employees can submit declarations to join the scheme.

**Participation declaration in the Employee Pension Plan**

---

Select language :  polish  english

---

New Declaration »

The process takes the form of a wizard consisting of several steps. After each step, the wizard validates the correctness of the data entered. It is possible to return to the previous step any time.



### Participation declaration in the Employee Pension Plan

**Step 1**  
Personal Info

Step 2  
Contribution

Step 3  
Authorized

Step 4  
Confirmation setup

Step 5  
Agreements & Declarations

Step 6  
Summary

Step 7  
Print Your Declaration

#### Employee personal information

First name

Last name

PESEL number  Gender

Date of birth (YYYY-MM-DD)

Country of birth

Citizenship

#### ID document

Type

Number  Country

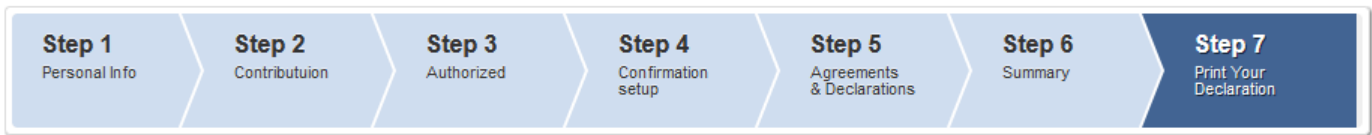
Date of issue (YYYY-MM-DD)

Validity date (YYYY-MM-DD)   open-end document

After validating the declaration summary, the employee can print/save the document filled in (as below).



## Participation declaration in the Employee Pension Plan



### Print Your Declaration

The declaration has been registered and is waiting for your employer's approval.

Print

The declaration, once submitted by the employee in an electronic form that allows its contents to be recorded on a durable data carrier, must be approved by the program administrator before it is submitted to the Financial Institution. The employer decides whether to additionally require the employee to provide a signed declaration. The declaration is submitted to the Financial Institution only electronically through the system elmpuls.

## 12. Submitting a statement

- Each employer participating in the EPS/SSP is provided with individual links through which employees can submit statements related to the agreements concluded under the scheme. Each type of statement has a unique address.
- The statement is filled in the same way as when submitting a declaration. The wizard divides the entire process into several steps. The number of steps may vary depending on the type and characteristics of the document filled in.



### Participant Data Change

**Step 1**  
Employee Identification

**Step 2**  
New Employee's personal data

**Step 3**  
Agreements & Declarations

**Step 4**  
Summary

**Step 5**  
Printout of declaration

#### Employee's personal data

First name	<input type="text"/>	Last name	<input type="text"/>
PESEL number	<input type="text"/>	Gender	<input type="text" value="-- please select --"/>
Type	<input type="text" value="identity card"/>	Country	<input type="text" value="-----"/>
Number	<input type="text"/>		
Date of issue (YYYY-MM-DD)	<input type="text"/>		
Validity date (YYYY-MM-DD)	<input type="text"/>	<input type="checkbox"/>	open-end document
Country of birth	<input type="text" value="-----"/>		
Citizenship	<input type="text" value="Poland"/>		

Required fields are marked with yellow background.

[Next »](#)

After validating the statement, the employee can print/save the document filled in (as below).



## Participant Data Change



## Printout of declaration

Your disposition have been registered. Now is waiting acceptance of you Employer staff.

Save to PDF

Print



generali-investments.pl