

Hargreaves Lansdown Workplace Solutions

USING THE EMPLOYER ADMINISTRATION WEBSITE

Issued by HL Workplace Solutions.
Hargreaves Lansdown Asset Management is authorised and regulated by the Financial Conduct Authority.

**HARGREAVES
LANDSDOWN**

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LOGGING IN

- This page allows each of your authorised users to log onto the employer administration site.
- Their username and password will determine the level of access that they have and the functions that they are able to carry out. You can find the site at:


<http://admin.corporate-vantage.co.uk>

- From this page, you are also able to download a copy of the Scheme Rules for the Vantage SIPP and our Terms & Conditions.

The screenshot shows a Microsoft Internet Explorer browser window with the title "HL Corporate Vantage : Home : Login - Microsoft Internet Explorer provided by Hargreaves Lansdown". The address bar shows the URL "https://qa-hlcorp/home/login.hl". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. The Favorites bar shows "Atlas - Employer Admin" and "Free Hotmail". The main content area has a dark header bar, followed by a blue bar with the word "Login". Below this is a green box with the text "Good morning. Please enter your username and password." Inside the green box, there are two input fields: "Username:" with the text "sapizza01" and "Password:" with masked characters. Below the password field is a green "Continue" button with a double arrow. At the bottom of the page, there is a small text box stating: "Once logged in you will be able to manage your schemes, administer your members and make contributions quickly and efficiently. Please note this site is to be used by **authorised personnel only**. Please contact the Corporate Vantage Helpdesk or your internal administrator should you have any queries regarding access and security."

SCHEME SUMMARY

- This page shows you each of your Workplace schemes. Payments for each scheme must be uploaded separately. To choose a scheme, simply click on the relevant link.
- You can also use this page to search for all the members of your schemes – further details on this feature are provided later.



[Log out](#)

**HARGREAVES
LANDSDOWN**

Corporate
Vantage

Scheme Summary

Your Schemes

HL Vantage Group SIPP Schemes
[SIPP scheme](#)

Corporate Vantage Stocks & Shares ISA Schemes
[ISA scheme](#)

Corporate Vantage Fund & Share Account Schemes
[Fund & Share scheme](#)

You must upload a payment schedule for each of your scheme(s) separately. Please click on the scheme name above to begin.

Your Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

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SCHEME SPECIFIC DETAILS

- Once you have chosen to view one of your schemes, you will reach this page. In this case, the SIPP is shown. This page allows you to start uploading a new payment schedule and to see all your earlier schedules.
- You can also search for all the members of this scheme.

All of your previous and current payment schedules are shown here, including their status and the amounts collected.

You can click on a schedule name at any time and for any status to see further details and download a copy of the data.

Corporate Vantage

SIPP scheme

[Scheme Summary](#)

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ SIPP scheme ☐ All schemes

Payment Schedules

Upload a new schedule for this scheme

What would you like to call your schedule?

When would you like the contributions to be processed? *

Before uploading your payment schedule, please ensure it is correctly formatted. [\[show help\]](#)

Please select your schedule contributions file to upload:

☐ I have checked the name, date and format of this schedule.

* The payment will be collected from your nominated bank account two working days after this date, on 19-10-2010.

Schedules

Name	Status	Action date	Members	Employer (£)	Employee (£)
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 PB test	Complete	07-09-2010	6	14,317.72	14,349.14

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.

No payments will be collected in respect of a schedule which has not been formally submitted.

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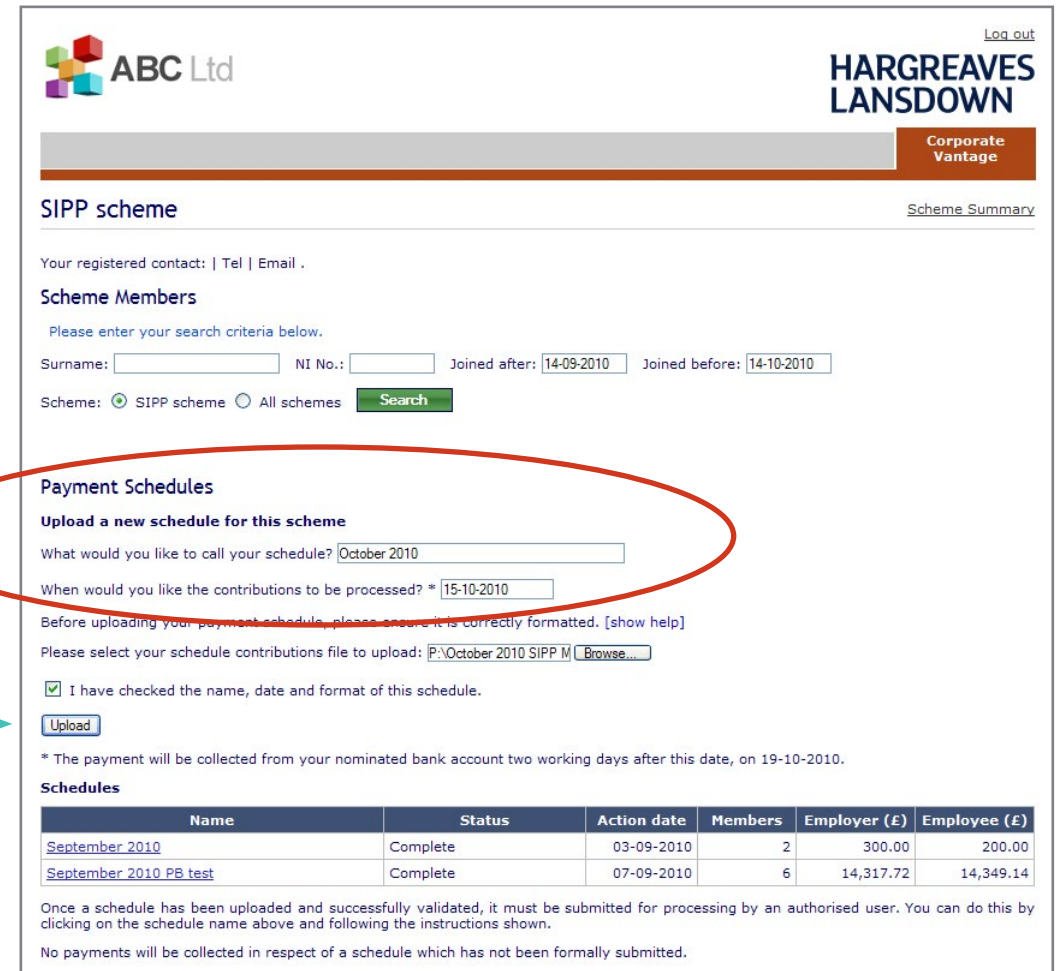
UPLOADING A PAYMENT SCHEDULE (1)

- You can name your schedule, tell us when you would like it to be processed, and choose the file to be uploaded here.

Salary Sacrifice Pension Schemes

Please remember that all pension contributions being made via a salary sacrifice arrangement must be uploaded as employer contributions.

Once you have chosen your file and are happy with the date and format, click 'upload'



ABC Ltd Log out **HARGREAVES LANSDOWN** Corporate Vantage

SIPP scheme [Scheme Summary](#)

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: 14-09-2010 Joined before: 14-10-2010

Scheme: ☒ SIPP scheme ☐ All schemes

Payment Schedules

Upload a new schedule for this scheme

What would you like to call your schedule? October 2010

When would you like the contributions to be processed? * 15-10-2010

Before uploading your payment schedule, please ensure it is correctly formatted. [\[show help\]](#)

Please select your schedule contributions file to upload: P:\October 2010 SIPP M

☒ I have checked the name, date and format of this schedule.

* The payment will be collected from your nominated bank account two working days after this date, on 19-10-2010.

Schedules


Name	Status	Action date	Members	Employer (£)	Employee (£)
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 PB test	Complete	07-09-2010	6	14,317.72	14,349.14

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.

No payments will be collected in respect of a schedule which has not been formally submitted.

UPLOADING A PAYMENT SCHEDULE (2)

- The schedule you have uploaded will be validated against the records we hold of your members. The status will show as **'Awaiting validation'** for a short time.



[Log out](#)

HARGREAVES LANSDOWN

Corporate Vantage

SIPP scheme

[Scheme Summary](#)

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ SIPP scheme ☐ All schemes

Payment Schedules

Name	Status	Action date	Members	Employer (£)	Employee (£)
October 2010	Awaiting validation	15-10-2010	2	300.00	200.00
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 PB test	Complete	07-09-2010	6	14,317.72	14,349.14

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.


No payments will be collected in respect of a schedule which has not been formally submitted.

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UPLOADING A PAYMENT SCHEDULE (3)

- Assuming that there are no errors or omissions in the data (for example it contains payment data for an employee we are unaware of, or is missing an NI number) the status of the file will change to **'Validated successfully'**.



[Log out](#)

HARGREAVES LANSDOWN

Corporate Vantage

SIPP scheme [Scheme Summary](#)

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ SIPP scheme ☐ All schemes

Payment Schedules

Name	Status	Action date	Members	Employer (£)	Employee (£)
October 2010	Validated successfully	15-10-2010	2	300.00	200.00
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 PB test	Complete	07-09-2010	6	14,317.72	14,349.14

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.

No payments will be collected in respect of a schedule which has not been formally submitted.

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SUBMITTING A SCHEDULE FOR PROCESSING (1)

- Once a schedule has been successfully validated, it must be submitted for processing by an authorised user. This must be done **before** the date on which you would like the data to be processed. To do this, click on the link to the relevant schedule in the list and you will reach this page:

Click here to tell us that you are happy for the schedule to be processed, and the funds to be collected from your bank account.

If for any reason you want to delete the schedule and upload a new version, you can do this here.

The screenshot displays the Hargreaves Lansdown Corporate Vantage interface. At the top, the ABC Ltd logo is on the left, and the Hargreaves Lansdown logo with a 'Log out' link is on the right. Below the header, the page title is 'Schedule - October 2010', with links for 'Scheme Summary' and 'SIPP scheme'. The main content area shows details for the 'HL Vantage Group SIPP - SIPP scheme', including the creation date (14-10-2010 12:38 by sapizza01), action date (15-10-2010), and member counts. It also lists financial figures: Employer (£300.00), Employee (£200.00), and Combined (£500.00), with a 'Download CSV' link. The status is 'Validated successfully', and a message states 'This schedule has been validated.' Below this, there are links to 'submit it for processing', 'show upload options', and 'delete this schedule'. A footer section contains links for 'About Us', 'Trust Deeds & Rules', 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy', along with a statement that Hargreaves Lansdown is authorised and regulated by the Financial Services Authority.

SUBMITTING A SCHEDULE FOR PROCESSING (2)

- Once you have submitted a schedule for processing, the status will change to 'Awaiting processing'. It will be processed on the date that you have chosen, and funds will be collected from your account 2 working days later.

Once a payment has been submitted for processing, you are able to download a receipt.

Whilst a schedule is '**Awaiting processing**' you can delete it or upload a replacement at any time before the process date.

The screenshot displays the Hargreaves Lansdown Employer Administration Website interface. At the top left is the ABC Ltd logo. At the top right, there is a 'Log out' link and the HARGREAVES LANSDOWN logo. Below the logo is a 'Corporate Vantage' button. The main heading is 'Schedule - October 2010', with links for 'Scheme Summary' and 'SIPP scheme'. The schedule details include: 'HL Vantage Group SIPP - SIPP scheme', 'Created on 14-10-2010 12:38 by sapizza01', 'Action date: 15-10-2010', 'Members: 2', 'Employer: £300.00', 'Employee: £200.00', and 'Combined: £500.00'. There is a 'Download CSV' link. The 'Current status' is 'Awaiting processing'. Below this, there is a 'Download a receipt' link, an option to 'Upload a replacement file for this schedule [show upload options]', and a link to 'click here to delete this schedule'. At the bottom, there are links for 'About Us', 'Trust Deeds & Rules', 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy', along with a statement that Hargreaves Lansdown is authorised and regulated by the Financial Services Authority.

YOUR RECEIPT

- Your receipt will confirm the amount to be collected, the date on which the payment will be processed and the date the funds will be collected by direct debit.
- You can also download a detailed receipt.

**HARGREAVES
LANSDOWN**


One College Square South
Anchor Road
Bristol
BS1 5HL

For any enquiries, please phone:
0845 365 1279

Printed 14-10-2010 13:02

Account No. 04704499

Schedule Receipt
ABC Ltd




Your Scheme: SIPP scheme
Schedule name: October 2010
Process date: 15-10-2010

Contribution Summary

Members	Employer	Employee	Total
2	£300.00	£200.00	£500.00

Payment
A payment of £500.00 will be collected by Direct Debit from your nominated bank account on 19-10-2010.


The Direct Debit Guarantee



- This Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society.
- If the amounts to be paid or the payment dates change Hargreaves Lansdown will notify you 10 working days in

PROCESSING BY HARGREAVES LANSDOWN

- On the date you have asked us to process your schedule, the status will change from **'Awaiting processing'** to **'Being processed'** and then to **'Complete'**.
- Funds will be collected from your chosen bank account two working days later.
- No changes can be made to a schedule that is **'Being processed'** or **'Complete'**.
- You can also download previous schedule receipts.



Log out
**HARGREAVES
LANSDOWN**
Corporate
Vantage

SIPP scheme

Scheme Summary

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ SIPP scheme ☐ All schemes

Payment Schedules

Upload a new schedule for this scheme

What would you like to call your schedule?

When would you like the contributions to be processed? *

Before uploading your payment schedule, please ensure it is correctly formatted. [\[show help\]](#)

Please select your schedule contributions file to upload:

☐ I have checked the name, date and format of this schedule.

* The payment will be collected from your nominated bank account two working days after this date, on 20-10-2010.

Schedules

Name	Status	Action date	Members	Employer (£)	Employee (£)
October 2010	Complete	15-10-2010	2	300.00	200.00
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 PB test	Complete	07-09-2010	6	14,317.72	14,349.14

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.

No payments will be collected in respect of a schedule which has not been formally submitted.

VIEWING EARLIER SCHEDULES


- You can click on any schedule which is complete and download the data you provided as a .csv file.
- This can form the basis of a future upload, though you must ensure all the details are updated for the relevant month.

The screenshot displays the Hargreaves Lansdown Corporate Vantage interface. At the top left is the ABC Ltd logo, and at the top right is the HARGREAVES LANSDOWN logo with a 'Log out' link. Below the logos is a navigation bar with 'Corporate Vantage' highlighted. The main content area is titled 'Schedule - October 2010' with links for 'Scheme Summary' and 'SIPP scheme'. The schedule details include: 'HL Vantage Group SIPP - SIPP scheme', 'Created on 14-10-2010 12:38 by sapizza01', 'Action date: 15-10-2010', 'Members: 2', 'Employer: £300.00', 'Employee: £200.00', and 'Combined: £500.00'. A 'Download CSV' link with a download icon is present. Below this, the 'Current status: Complete' is shown, followed by the message 'This schedule has been successfully processed.' and a 'Download a receipt' link. At the bottom, there is a footer with links for 'About Us', 'Trust Deeds & Rules', 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy', along with a statement that Hargreaves Lansdown is authorised and regulated by the Financial Services Authority.

Click here to download the schedule as a .csv file

USING THE MEMBER SEARCH FACILITY (1)

- You can search for all members who joined within a certain date range or look for a particular member.
- On the scheme summary page, you can search for the members of all your schemes.
- You can clear the 'joined after' date and search for members using their surname or NINO.



[Log out](#)
**HARGREAVES
LANSDOWN**
Corporate
Vantage

Member search

[Scheme Summary](#) [SIPP scheme](#)









Scheme: **SIPP scheme**

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ SIPP scheme ☐ All schemes

Search results

	Forenames 	Surname 	NI No. 	Schemes
	Forename 00527358	Surname 00527358	AB123456C	Pizza Place Pension Scheme SIPP »
	Annie188	Aircon98	AB000288D	Pizza Place Pension Scheme SIPP »
	Susan	Coxon	AF001001A	Pizza Place Pension Scheme SIPP »
	Roger	Hayne	AF001002A	Pizza Place Pension Scheme SIPP »
	Patricia	Naylor	AF001004A	Pizza Place Pension Scheme SIPP »


« first « previous **Showing results 1 to 5 of 5** next » last »

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USING THE MEMBER SEARCH FACILITY (2)

- Once you have already reached the page for a specific scheme, you can search for the members of that scheme, or the members of all your schemes.



[Log out](#)
**HARGREAVES
LANDSDOWN**
Corporate
Vantage

Member search

[Scheme Summary](#)

Please enter your search criteria below.

Surname:



NI No.:

Joined after: 01-08-2010

Joined before: 14-10-2010

Search

Search results

	Forenames	Surname	NI No.	Schemes
	Forename 00527358	Surname 00527358	AB123456C	Pizza Place Pension Scheme SIPP » Pizza Place Pension Scheme ISA » Pizza Place Pension Scheme Fund & Share »
	Annie188	Aircon98	AB000288D	Pizza Place Pension Scheme SIPP »
	Albert	Brookin	AF001005A	Pizza Place Pension Scheme ISA »

< first < previous **Showing results 1 to 3 of 3** next > last >

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ADDITIONAL INFORMATION

TIMING

- When you upload a schedule, you can tell us when you want us to process it.
- This must be a date in the future. You can choose different dates for different schemes if you wish.
- The total payment will be collected from your bank account 2 working days later. The website and receipt will confirm the payment collection date. Payments will be collected by direct debit.

Log out

ABC Ltd

HARGREAVES LANSDOWN

Corporate Vantage

ISA scheme

Scheme Summary

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: 14-09-2010 Joined before: 14-10-2010

Scheme: ☒ ISA scheme ☐ All schemes Search

Payment Schedules

Upload a new schedule for this scheme

What would you like to call your schedule? October 2010

When would you like the contributions to be processed? * 15-10-2010

Before uploading your payment schedule, please ensure it is correctly formatted. [show help]

Please select your schedule contributions file to upload: P:\October 2010 ISA MS Browse

☐ I have checked the name, date and format of this schedule.

Upload

* The payment will be collected from your nominated bank account two working days after this date, on 19-10-2010.

If the data isn't in the correct format, the file name will be displayed in red and you will not have the option to upload it.

DATA FORMAT

- The data must be uploaded as a .csv file. Here is an example of the way the data must be arranged. All fields are mandatory and if any monetary amount is nil, please enter '0'.
- Monetary values should not include commas as the .csv file will delimit these to a new column. For example, use '2000' and not '2,000'.
- The Reference Pay figure to be supplied here is the individual's pensionable pay for the relevant pay period. You must also detail the percentage of pensionable pay which each contribution represents.
- Contributions made via salary exchange/sacrifice must be included in the employer column (column D) along with the amount the employer has contributed.
- Contributions made via relief at source must be included in the employee column (column E)
- HL cannot accept contributions made using a net pay arrangement
- Please do not include minus/negative figures within the Employer £ or Employee £ columns – **this will not initiate a refund**. If a refund is required, please contact us via telephone or email.

IMPORTANT NOTE – The amounts shown in the Employer £ column and the percentages entered in the Employer % column should represent all employer contributions for that individual including those derived from salary exchange. The Pensions Regulator (tPR) requires us to monitor that the payments being paid to an individual's workplace pension by their employers are those to which they are entitled. We therefore need details of their pensionable pay for each relevant month and the percentage contributions due that month. We use this data to check that the amounts we receive each month are correct and to check that our records of the salary percentages due are up to date. Where necessary, we will check any discrepancies with you.

FAILED VALIDATION (1)

- If the file cannot be validated successfully the status will change to **'Validated with errors'**. Clicking on the link to the relevant schedule in the list will show you why the file could not be validated.

In this example, the employee could not be matched with our records. Please check their personal details carefully. Using the member search facility will show you the exact details we hold for each of your members.


The screenshot shows the Hargreaves Lansdown Employer Administration Website. The header includes the ABC Ltd logo, the Hargreaves Lansdown logo, and a 'Log out' link. A 'Corporate Vantage' banner is present. The main heading is 'Schedule - October 2010', with links for 'Scheme Summary' and 'ISA scheme'. The page details the 'Corporate Vantage Stocks & Shares ISA - ISA scheme', created on 14-10-2010 13:11 by sapizza01. It lists action date, members, employer, employee, and combined contributions. The 'Current status' is 'Validated with errors'. A message states: 'This schedule failed validation. Please correct the problems below and upload the new file.' Two errors are listed: 'Corporate1015 Vantage1015 - NI no. ZZ000795P' with the sub-error 'Employee record not found', and 'Corporate1017 Vantage1017 - NI no. ZZ000797B' with the sub-error 'Client is not a member of this scheme'. Links for uploading a replacement file and deleting the schedule are provided. The footer contains links for 'About Us', 'Trust Deeds & Rules', 'Disclaimer', 'Terms & Conditions', and 'Privacy Policy', along with a statement of authorization by the Financial Services Authority.

This screenshot is similar to the one above but shows a different set of validation errors. The header and main heading are the same. The 'Current status' is 'Validated with errors'. The message states: 'This schedule failed validation. Please correct the problems below and upload the new file.' One error is listed: 'Corporate1015 Vantage1015 - NI no. ZZ000795P' with the sub-error 'Mandatory employee fields are empty'. Links for uploading a replacement file and deleting the schedule are provided. The footer is identical to the previous screenshot.

In this example, the employee contribution field was left blank.

FAILED VALIDATION (2)

- Any schedule that has not been successfully validated will show here. However, you will be unable to approve and submit it for processing until any errors have been accounted for and a replacement schedule has been uploaded and successfully validated.



[Log out](#)

**HARGREAVES
LANSDOWN**

Corporate
Vantage

ISA scheme

[Scheme Summary](#)

Your registered contact: | Tel | Email .

Scheme Members

Please enter your search criteria below.

Surname: NI No.: Joined after: Joined before:

Scheme: ☒ ISA scheme ☐ All schemes

Payment Schedules

Name	Status	Action date	Members	Employer (£)	Employee (£)
October 2010	Validated with errors	15-10-2010	1	0.00	100.00
September 2010	Complete	03-09-2010	2	300.00	200.00
September 2010 pb	Complete	07-09-2010	5	1,104.85	3,980.81

Once a schedule has been uploaded and successfully validated, it must be submitted for processing by an authorised user. You can do this by clicking on the schedule name above and following the instructions shown.

No payments will be collected in respect of a schedule which has not been formally submitted.

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If you have any queries regarding uploading a schedule, or the collection of your payments please do not hesitate to call us on 0117 980 9992.