AGPOL Data upload guide

for a Group Protection renewal



Before you get started

If you have lots of changes or have a policy with more than 20 members, you will need to upload your member data via our easy-to-use

Excel template here

Download the spreadsheet and click enable editing.

| | | | Gro | up Prote | ction R | enewal inform | ation |
|---------------|----------------|----------|-----------|-----------------|----------------|-------------------------|-----------|
| Policy Name:- | | | | Policy Number:- | | | |
| Gender | Date of Birth | Title | Surname | Forename | Salary | Date of Joining Company | Date of . |
| eg. F | eg. 01/01/1970 | eg. Miss | eg. Smith | eg. Anne | eg. £25,000.00 | eg. 01/01/2010 | eg. |
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You will then be able to see your data and make any changes / amends

Please note, red notifications indicate that the member needs attention, this might be something like a missing category code. Amber notifications will show you any members that are to be excluded from the policy, explaining why. It may be that some members don't meet the eligibility criteria.

Before you upload your data, hover over the titles to find tips and guidance on how to upload your data correctly. It is important to make sure you have entered the data in the expected format to avoid the spreadsheet being rejected. The spreadsheet will get rejected if the file is larger than 5mb.

Once you have **uploaded** your data, click save.

Drag or upload the saved Excel file onto AGPOL.

| | | - | Gro | up Prote | ction R | ene | wal inform | ati |
|-------------------------|----------------|----------|-----------|-----------------------------|---------------------------------|-----|--------------------|----------|
| Policy Name:- Gender | Date of Birth | Title | Surname | Policy Number:- Forename | Please remove | any | of Joining Company | Da |
| eg. F | eg. 01/01/1970 | eg. Miss | eg. Smith | eg. Anne | as à or é from employees nam | ies | eg. 01/01/2010 | |
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| You can upl | ad data below |
|--|--|
| IMPORTANT! It's vit Please use the uplo Please download the | to format the spreadsheet correctly so our system can capture all your members' information correctly. Ing data guide or watch the video for help on how to upload and format data when using a spreadsheet preadsheet template and fill in the detail before uploading. |
| | Drag your file here to add spreadsheet |
| Or select a file | |
| | |
| | |



If you make any changes / amends, remember to press save.

Once you save your data, you will be presented with a renewal overview which will give you a high-level summary of the changes you have made. This is to ensure you are happy with the changes.

| | 0016 | Moran | 001 | 43250.00 |
|---------|-------------------------|------------------------|------------------------|---|
| ۲ | 0017 | Parks | 001 | 43250.00 |
| | Member code | Surname | Category code | Category name |
| | 0017 | Parks | 001 ~ | Senior Associates, Working Director & Practice Secretary |
| | Title | Gender | Forename | Date of birth |
| | Mr | Male | Walter | 16/06/1981 |
| | Date of joining company | Date of joining scheme | Date of leaving scheme | Salary |
| | n/a | 25/09/2020 | DD/MM/YYYY | £ 43250.00 |
| \odot | Add new member | | | |
| | Member code | Gender | Date of birth | Salary |
| | TBC | Please select 🗸 | DD/MM/YYYY | £ 0000 |
| | Title | Surname | Forename | Category name |
| | | Surname | Forename | |







Click the confirmation button at the bottom once you are happy and process your renewal.

| Con | firmation | |
|-------------------|---|--|
| Please cover u | pe aware that failure to disclose relevant information may result in non-payment of a claim and all nder the policy being cancelled. | |
| | | |
| ~ | You won't be able to change the data once you proceed to the next stage. By ticking this checkbox, you confirm that you have checked all the data is correct. | |
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If you need further assistance

- Watch our 'How to' video on uploading member data here
- @ Or, contact our support team here

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