



INWESTYCJE

Video Transcript – Process of Concluding a PPK Maintenance Agreement in TFI PZU

This material presents the process of concluding a PPK Maintenance Agreement.

During the Management Agreement process, the employer designated an administrator whose e-mail address received an individual login for the e-PPK system.

To conclude the Maintenance Agreement, go to **ppk.pzu.pl**, select **Log in** in the upper-right corner, and then choose **PPK for Employers**.

The first message displayed confirms that the Management Agreement has been signed.

Click **Start** to begin the process of signing the PPK Maintenance Agreement.

At the beginning, you may review the template of the Maintenance Agreement as well as the regulations.

The employing entity's data is automatically populated based on the signed Management Agreement.

If any information has changed, you may edit all fields except REGON and NIP.

Enter the current number of employees and proceed to the next step.

Adding Employees

In the next step, you will add employees. There are two available methods:

1. **Add employees manually** by completing the form, or
2. **Import a file** previously prepared.

You may import a file generated from your HR and payroll system or complete the template available in the e-PPK portal.

The template clearly marks which fields are mandatory.

Once the employee data file is completed, save it to your computer and upload it using **Add file from disk**.

If the file contains errors, you will have three options:

- **Import all – I will correct the errors manually,**
 - **Import only correct entries – I will add the remaining ones manually,**
 - **Do not import – I will correct the file and upload it again.**
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Choosing the Method of Signing the Maintenance Agreement

Next, select the method of signing the Maintenance Agreement. You can choose from three options:

- **SMS,**
- **Print (traditional signature),**
- **Qualified electronic signature.**

Click the information icon (i) next to each option to view detailed instructions.

Signing the Agreement via SMS

The details of the signing person are loaded automatically.

Verify whether the data is correct — if not, you can edit or remove the person.

You can also add another employee authorised to sign the Maintenance Agreement.

Next, review and accept the mandatory declaration.

Click **Save and continue**.

A window will appear confirming that the agreement is ready for approval.

You may review the agreement and the regulations.

If all data is correct, click **Save and continue**.

Additionally, you may print:

- the list of enrolled employees,
- the payment account number.

Use the corresponding icons to download the documents.

After reviewing them, click **Close**.

The next step is the electronic signature by the employing entity.

You will be redirected to the start page.

At this moment, an e-mail is sent to the employer's representative containing a login link.

The signing person clicks the link and is redirected to the e-PPK system.

After clicking **Sign**, they receive an SMS code, which must be entered and confirmed.

Before signing, the agreement may be reviewed via the agreement icon.

Clicking **Sign Agreement** finalises the electronic signature.

Please note:

If multiple people were designated to sign, the agreement is concluded only after *all* required signatures have been submitted.

To complete the process, the signing person clicks **Finish**.

The agreement is then electronically signed by TFI PZU.

Signing the Agreement via Printed Document (Traditional Method)

The data of the signing person is loaded automatically.

Verify whether the information is correct — you may edit or remove the person if necessary, or add another authorised individual.

Review and accept the mandatory declaration.

Click **Save and continue**.

A window will appear confirming that the agreement is ready.

You may review the agreement and the regulations.

If everything is correct, click **Save and continue**.

The system informs you that the agreement is ready.

By clicking the agreement icon, you can download and print the document to forward it for signature by the employer.

After completing this step, click **Next**.

You may also print the list of enrolled employees and the payment account number.

Use the corresponding icons to download the documents.

Then click **Next**.

On the next screen, upload a scan of the employer-signed agreement.

You may drag the file into the designated area or select **Add file from disk**.

Choose the file and click **Save scan**.

Remember to mark the required declaration to enable file upload.

The system will inform you that the next step is the signature of the Maintenance Agreement by TFI PZU.

The employer's representatives will also receive this notification.

Only after TFI PZU signs the agreement will you receive an e-mail confirming the conclusion of the Maintenance Agreement.

The process of signing via qualified electronic signature is analogous to the print-based method, except for the way the document is signed.

A qualified electronic signature requires dedicated software.

If you have any difficulties or additional questions, please contact our helpline at:

22 640 06 22.