Video Transcript – Handling Orders in the e-PPK Service

Speaker 1

In this material, you will learn how to enter orders and participant instructions in the e-PPK service. After logging in to the system, you can process orders in two ways: directly from the participant list or by uploading a prepared file.

Let's start with placing orders from the level of a specific PPK participant.

From the employee list, find the participant to whom the order or instruction applies. On the right-hand side, click the three dots and select the appropriate module.
For example, if you need to update personal or contact details, select **"Data Change."** Then choose the information you want to update and click the appropriate field. For demonstration purposes, we will now update contact details.

If you want to add the participant's email address or mobile phone number, enter it in this section. Click **"Confirm."** Then confirm the instruction again by clicking **"Confirm."**

Download the PDF by clicking the icon, print two copies, and hand them to the employee for signature. One signed copy should be archived in the PPK documentation. Finally, click **"Close."**

If you need to enter a participant instruction, select **"Instructions"** from the list and then choose the appropriate one. Available options include:

- resignation from contributions,
- change of employee's mandatory contribution,
- change of employee's voluntary contribution,
- termination of employment,
- change of PPK enrollment date,
- transfer withdrawal request.

Let's assume you want to submit a transfer withdrawal request on behalf of an employee who already had a PPK in their previous workplace and now wants to transfer their savings to the PPK administered by TFI PZU.

Click the **"Transfer Withdrawal Request"** tile.
Choose the basis for the transfer request. In the case of a change of employer, select the first option — **"Based on information provided by the PPK participant."**

Select the name of the institution that managed the participant's PPK in their previous workplace. Enter the PPK account number from the previous institution — this information is required to process the transfer.
Click **"Confirm."** Then confirm the instruction again by clicking **"Confirm."**

Now download the PDF confirming the order, print two copies, give one to the employee, and archive the other signed copy in the PPK documentation.

All orders can also be processed using files. If this method is more convenient for you, or if you want to apply a change (for example, a data update) for multiple participants at once, it is worth using the file upload option.

From the main screen of the e-PPK service, go to the **“Orders”** tab. Then select the order you want to upload, for example **“Personal Data Change (File Upload).”**
You can download the template prepared by us and enter the correct data into it. Then upload the completed file with valid data and click **“Submit Instruction.”**

If an error message appears, download the error report and check which fields need correction. After making the necessary changes, upload the file again.

Remember: if you need to verify with your payroll/HR system provider whether the system can generate files compatible with the templates available in the e-PPK service, you can provide them with the file specification.
Having your HR system generate ready-made files will save you time and eliminate the need for manual data entry.