

Introduction of AsgaOnline

1. Introduction

Dear customers,

AsgaOnline is the quickest way to access your pension fund. The practical online portal makes it easier for you to manage occupational benefits in your company.

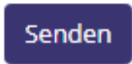
In this introduction, you will learn what AsgaOnline offers and how it works in brief and clear terms. For example:

- ▶ Which forms you can transfer to us easily and directly with just a few clicks
- ▶ How to complete the annual salary list quickly and easily
- ▶ Where you can find the benefits and contributions of the insured persons

We hope you enjoy using AsgaOnline.

2. General functions

2.1 Buttons in the forms

	Send (Senden) Submits forms directly to Asga. All submitted changes can be found in the Cockpit under "Your recent changes" (Ihre letzten Mutationen) or "Documents" (Dokumente).
	Print (Drucken) Generates a report of the selected list or form on the screen. You can print the report or export it in different formats.
	System information Shows information about the computer system you are using. This helps our support team to answer your questions about AsgaOnline.
	Required field An asterisk "*" identifies all the required fields in forms (to the right of the field to be completed). If the required field is not completed, the form cannot be submitted. A red message appears next to the field.
	Help Shows instructions and help for the forms and how to use AsgaOnline.

3. Menu navigation

Front page (Startseite)

On the front page (Startseite) you will find quick access to the subpages "Cockpit", "Staff administration" (Mitarbeitende Mutationen), "Invoices" (Rechnungen) and "My company" (Meine Firma). "Mein persönlicher Kontakt" shows your direct contact. "Mailbox"

(Postfach) contains all items which are either pending, in progress or done. You will also find the date of the last salary list.

Cockpit

"Cockpit" shows the following important information for your company at a glance: unread messages (Ungelesene Meldungen), account overview (Konto Übersicht), your recent changes (Ihre letzten Mutationen), groups of insured persons (Versicherte pro Personenkreis), information about the groups (Angaben zu den Personenkreisen), contract details (Vertragsdaten) and registered addresses (Gemeldete Adressen).

Staff (Mitarbeitende)

Here you can make various changes (e.g. simulation of persons joining or leaving, changes in marital status, etc.) and find documents such as an address list or overview of insured members. Changes such as persons leaving, marital status or wage changes can be called up by double-clicking on the required employee in the overview.

This area also includes the salary list due at the beginning of the year as well as information on how to submit the salary list.

My company (Meine Firma)

Changes to your company's location, correspondence address or contact person can be made here. In the Changes menu you will see an overview of all the benefits and contributions for all employees and can export this as an Excel file. Detailed information about the contributions can be shown by double-clicking on the required employee. You will also find an overview of the contribution account, employer contribution reserve (ECR), contribution waiver and occupational benefits fund accounts here.

Invoices (Rechnungen)

You can find an up-to-date overview with all invoices for the year here. You can download the invoices under Download.

Documents (Dokumente)

This section contains all the contracts, the benefits plan, the directory of insured persons, invoices and publications. You can download the documents directly. It also shows all the submitted forms.

Settings (Einstellungen)

Various settings such as notifications and changing a password can be made here.

Admin tools (Admin Werkzeuge) User administration (Benutzerverwaltung) Invite user (Benutzer einladen)

Here you can add additional users independently.

User administration (Benutzerverwaltung)

You can see all access logins, including those for brokers, at a glance.

4. Changes

You can transmit these changes directly to us in AsgaOnline.:

Change in salary/group of insured persons (Lohn-/Personenkreis)

Inform us about a change in salary or a change in the group of persons - e.g. according to the management plan or part-time plan. You can also adjust the level of employment here.

Termination (Austritt)

You can report an employee's departure from the pension fund here. If the details of the new employer's pension fund are already known, you can enter them here.

Address (Adresse)

Please notify us here if an employee moves house.

Change of name/marital status (Zivilstandsänderung)

Report changes of name and marital status here.

▼ Please pay particular attention to the following page.

Change of language (Sprachänderung)

If an insured person wishes to receive their personal documents in French, Italian or English in future, please change the language here.

Information about the previous pension fund (Angaben vorherige Pensionskasse)

Here you can inform us of the former pension fund or a vested benefits accounts at a bank. We will then request the vested benefits for the respective insured person.

New registration (Neuanmeldung)

You can register a new employee here.

Correspondence address (Korrespondenz-Adresse)

Would you like to use a different correspondence address in future? No problem - inform us of your new correspondence address here.

Company address (Sitzadresse)

Has your company moved? Use this form to notify us of your new address.

Contact details (Kontaktangaben)

Notify us here of the contact details of the person responsible for the pension fund in your company.

5. Salary list

5.1 General information about the wage list

Fragen Lohnliste Senden

Sind alle Personen voll arbeitsfähig? (alle aus gesundheitlichen Gründen nicht voll arbeitsfähigen Personen sind in der Kolonne "Bemerkungen" zu bezeichnen) *

Hatten Sie im Jahr 2020 obligatorisch zu versicherndes Personal noch bei einer anderen Pensionskasse versichert? *

The salary list for the upcoming year will be available in AsgaOnline in December. You will find the salary list in your inbox or under "Staff" (Mitarbeitende). This list includes only staff and data registered with us at the time the list is created. Terminations, new entries and changes submitted afterwards will not be shown.

First, a window appears with questions as to whether all insured persons are fully able to work and whether additional staff are employed who were subject to compulsory insurance with another pension fund in the previous year. After saving your answers you will see the salary list form.

Only the most important fields are included on the salary list. For changes to an address or social security number please use the relevant forms in the staff overview (Mitarbeitendenübersicht). If a person who has left the company still appears on the list, you can note this under "Comments" with "Termination previous year". Please create a separate notice of termination.

Under "Comments" please also inform us if there is a new or existing claim. If you save the salary list it will not appear under the saved forms. The salary list can be called up under "Salary list" (Lohnliste) or under "Pending items" (Pendenzen).

Stichtag	Versanddatum	Lohnperiode von	Lohnperiode bis	Mahndatum	Mahnstatus	Verarbeitungsstatus
01.01.2020	22.12.2020	01.01.2020	31.12.2020		Keine Mahnung	Versand gemacht

The column "Salary new" (Lohn neu) must be completed. Make sure to only enter rounded values. All other columns show current values.

Name, Vorname	Lohn alt	Lohn neu	Personenkreis	Be.grad%	Bemerkungen	Geburtsdatum	Zivilstand	Heiratsdatum
Muster, Kurt	31'800.00		0 = Personal	70		05.09.1980	unbekannt	TT.mm.jjjj

- ▶ The reference date (Stichtag) indicates the year for which the salaries apply.
- ▶ The date of posting (Versanddatum) is the date of electronic dispatch (you will also be informed by e-mail if you indicate this in the navigation menu under "Settings" (Einstellungen).
- ▶ Processing status:
 - Sent (Versand gemacht) ▶ The salary list is ready and has not yet been processed by you.
 - Registered receipt (Eingang registriert)
 - Entry started (Erfassung begonnen) ▶ Entry has started and the salary list has been temporarily saved.
 - Entry completed (Erfassung beendet) ▶ The salary list has been entered and submitted to us.

▼ Please pay particular attention to the following page.

Approved (Freigegeben) ▶ The salary list is ready for us to book the new salaries.

Booked (verbucht) ▶ The wage list is completely booked by us.

5.2 Additional buttons in the wage list form

In the wage list there are some additional buttons, which do not exist in the staff mutation forms. Please find a short description of these buttons:

Löhne kopieren

Copy wages

You have no deviations from the wages of the previous year? With this button you can copy the wages for all insured persons from the last year.

Löhne löschen

Delete wages

If you want to delete all new indicated wages, click "delete wages" (Löhne löschen).