

Ref	Data field	Field type	Format / Length	Requirement	Description	Used to
Take On file input						
TAF1	Title	Character	10 char	Mandatory	The relevant employee's title e.g. Mr, Mrs, Miss, Dr	Set up the member record on the platform. Also used for communications, reports and searches.
TAF2	First name	Character	50 char	Mandatory	first name of relevant employee, e.g. David	Set up the member record on the platform. Also used for communications, reports and searches.
TAF3	Surname	Character	50 char	Mandatory	Last name of the relevant employee, e.g. Smith	Set up the member record on the platform. Also used for communications, reports and searches.
TAF4	National Insurance number	Character	9 char	Mandatory	The employee's NI number. In the event that an ER does not have a NINO, a temporary one will need to be entered.	Provide a unique identifier for the relevant employee.
TAF5	Employer reference	Character	36 char	Mandatory	The employer's unique identifier for the relevant employee	Provide a unique identifier for the relevant employee.
TAF6	Gender	Character	6 char	Mandatory	Male or female	Set up the member record on the platform.
TAF7	Date of birth	Date	DD/MM/YYYY	Mandatory	The relevant employee's date of birth	Set up the member record on the platform. Also used to calculate current and State Pension ages to determine eligibility.
TAF8	Permanent residential address - line 1	Character	80 char	Mandatory	The first line of the relevant employee's address, e.g. 10 New Road	Set up the member record on the platform and for communications.
TAF9	Permanent residential address - line 2	Character	80 char	Optional	The second line of the relevant employee's address, e.g. River View	Set up the member record on the platform and for communications.
TAF10	Permanent residential address - line 3	Character	80 char	Optional	The third line of the relevant employee's address	Set up the member record on the platform and for communications.
TAF11	Permanent residential address - line 4	Character	80 char	Optional	The fourth line of the relevant employee's address	Set up the member record on the platform and for communications.
TAF12	Permanent residential address – postcode	Character	8 char	Mandatory	The relevant employee's postcode, e.g. AB12 3CD	Set up the member record on the platform and for communications.
TAF13	Country of residence	Character	13 char	Mandatory	The relevant employee's country (as part of their address). Must be a valid 3 digit country code from the following list. http://unstats.un.org/unsd/methods/m49/m49alpha.htm The NGS restrictions to residency should be noted when completing.	Set up the member record on the platform and for communications.
TAF14	Telephone number (home/mobile)	numeric	100 char	Mandatory	The relevant employee's home phone number	Set up the member record on the platform and for communications.
TAF15	Telephone number (work) (optional)	numeric	100 char	Mandatory	The relevant employee's work phone number	Set up the member record on the platform and for communications.
TAF16	Email address (work)	Character	60 char	Mandatory	The relevant employee's work e-mail address.	Set up the member record on the platform and for communications. If no e-mail address is supplied key member correspondence will be supplied in hard copy.
TAF17	Email address (personal)	80 char	60 char	Mandatory	The relevant employee's personal e-mail address.	Set up the member record on the platform and for communications. If no e-mail address is supplied key member correspondence will be supplied in hard copy.
TAF18	Preferred email (work / personal)	Character	12 char - if supplied must be 'work' or 'personal'	Mandatory	Work or personal	Set up the preference on the platform and for communications.
TAF19	Marketing opt out (Y/N)	Character	Must be Y or N	Mandatory	Yes or No	Set up the preference on the platform and for communications.
TAF20	Date joined employer	Date	DD/MM/YYYY	Mandatory	The relevant employee's employment start date	Provides Aviva with data that powers ongoing auto enrolment monitoring.
TAF21	Salary (before tax)	numeric	13 char	Mandatory	The value of the employee's salary	Provide detail that will drive illustrations and projections for the member.
TAF22	Member category	Character	150 char	Mandatory	The category name for the specific section of the workforce, e.g. Managers	Segment the workforce into different categories and allows different payroll contributions for different groups of employees.
TAF23	Scheme Number	numeric	36 char	Mandatory	A unique scheme identifier	Provide Aviva with information to ensure the member is assessed for entry into the correct scheme.
TAF24	Selected retirement age	numeric	5 char	Mandatory	Age from 55-74	Provide an initial selected retirement date that the member can update at any time thereafter.
TAF25	Date left employer	Date	DD/MM/YYYY	Mandatory	If populated employer duties will cease for the member	Provide Aviva with the relevant information to cease employer duties against a member.
TAF26	Salary exchange (Y/N)	Character	Must be Y or N	Mandatory	Yes or No	Set up the member record with relevant information around the payroll contribution type.
TAF27	Employer – regular contribution (%)	numeric	8 char	Mandatory	Expected contribution level if a pension is created for the member	Set up the member record with the relevant information to inform the member of the level of payroll contributions they can initially expect to receive.
TAF28	Employee – regular contribution (%)	numeric	8 char	Mandatory	Expected contribution level if a pension is created for the member	Set up the member record with the relevant information to inform the member of the level of payroll contributions they can initially expect to receive.
TAF29	Gross Salary in Pay Period	numeric	13 char	Mandatory	The employee's gross pay in the pay period. Used for member categories set up for qualifying earnings.	Ensure that members are assessed on the correct earnings basis.
TAF30	Pensionable Salary in Pay Period	numeric	13 char	Optional	Required for those members whose contribution basis is not 'qualifying earnings' (see Aviva guide EPEN16e). Member categories will be set up for non qualifying categories and this method of pay assessment will map to those member categories.	Ensure that members are assessed on the correct earnings basis.
TAF31	UK Contract (Y/N)	Character	Must be Y or N	Mandatory	Yes or No	Determine whether the member should be assessed for employer duties.
TAF32	Member Contribution Frequency	Character	No restriction. Must be one of: = Weekly = Calendarly Monthly = Quarterly = Half-Yearly =Yearly	Mandatory	Annually, half-yearly, quarterly, monthly, fortnightly, and weekly	Set up the member record with the relevant information to inform the member of the frequency of payroll contributions they can initially expect to receive.
Additional items for take-on activity						
TO1	Employer duty change date	Date	DD/MM/YYYY Can be date in the past or the future	Mandatory	The date that the scheme changes from the previous provider to Aviva. The date is set at member level but is likely to be static across the members being uploaded	Determines date from which Aviva are responsible for providing AE services and when first assessment is due.
TO2	Member join date	Date	DD/MM/YYYY must be a date in the past	Mandatory	Date member commenced a pension with the previous supplier	Used to determine whether an FRA is opened for the member.
TO3	AE Date	Date	DD/MM/YYYY	Mandatory	This is the worker's original AE date as this may be different to date Aviva scheme membership starts. tPR require us to keep a record of the AE date.	Set up member record with correct audit trail. Required to be kept in line with tPR regulations
TO4	Assessed worker status	Character	Must be; Eligible Non eligible EW ND <blank> for those in postponement	Mandatory	Eligibility status from the previous scheme	Determines; 1. Worker status on Aviva scheme 2. Worker communications that go out 3. Whether an FRA is opened
TO5	Assessment status date	Date	DD/MM/YYYY	Mandatory	Date on which last eligibility status was confirmed	Set up member record with correct audit trail
TO6	Waiting period end date	Date	DD/MM/YYYY Can be date in the past or the future	Conditional mandatory (If it exists, it is required)	This date will be used where a worker has been uploaded to the previous scheme and is in the waiting period ahead of assessment on the previous scheme. Only primary assessment period end dates will need to be captured. This data will overwrite any postponement date derived with reference to the member category.	The data will be used to set the member-level assessment date on NGS.
TO7	Opt Out date	Date	DD/MM/YYYY. Must be date in the past	Conditional mandatory (If it exists, it is required)	This detail can be accessed from the previous provider and should only be populated where a member has opted out of the previous pension scheme having previously been assessed as an Eligible Jobholder	This date will be used to 'opt out' an individual previously marked as an opted-out Eligible jobholder on the previous scheme. This will have the effect of not opening an FRA for those workers and marking their record for a triennial review.
TO8	Opt In date	Date	DD/MM/YYYY. Must be date in the past	Conditional mandatory (If it exists, it is required)	This detail can be accessed from the previous provider and should only be populated where a member has opted into the previous pension scheme having previously been assessed as a Non eligible jobholder. Must not be populated for member's who are Entitled Workers	This date will be used to 'opt in' an individual previously marked as an opted-in Non eligible jobholder on the previous scheme. This will have the effect of opening an FRA for the worker. (and providing them with the right to opt out of Aviva scheme)

TO9	Cease active membership date	Date	DD/MM/YYYY	Conditional mandatory (If it exists, it is required)	This detail can be accessed from the previous provider and should only be populated where a member has ceased contributions to the previous pension scheme. This status will only be relevant for those assessed in the previous scheme as Eligible jobholders and Non eligible jobholders	Needed to support tPR late contribution monitoring requirements. Prevents FRA account being opened, determines whether or not worker is included in next triennial review
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