Guide to Mijn NN Zakelijk

for employers

Notes on
Mijn NN Zakelijk

for employers

Contents

More information?

Please ask your client manager or contact if you have any questions about using Mijn NN Zakelijk.

General

What is Mijn NN Zakelijk?

The new Mijn NN Zakelijk is a single location where you can manage all your company's business products. We offer handy links with external bodies to minimise your administrative work and we are making it even easier to submit updates.

Mijn NN Zakelijk has been developed in close consultation with customers and advisers and so, for example, there are no unnecessary inputs. And navigation through the screens is much improved. The look & feel is also better.

The advantages of Mijn NN Zakelijk

1. **Focus on convenience and simplicity**
   We only ask you to input information we cannot get from other sources such as the Employee Insurance Agency (UWV) and the Personal Records Database (BRP). The information display is stratified: you see the most important information immediately and then click down for more detail.

2. **Minimising your administrative work with automatic links to municipalities, the UWV and other bodies**
   For example, you no longer have to submit changes of address unless someone lives abroad. We also process information on civil status automatically. See the Civil status and children event card for more information.

3. **Performance**
   We have worked to create an even faster environment that meets all the requirements for a modern website.

4. **Everything in one place**
   1. Submit updates.
   2. Information brought together for each employee.
   3. Documents available (for example, the Pensioen 1-2 and pension regulations and administration agreement).
   4. Overview of all billing statements and financial status.

5. **Live help**
   If you want, we can look in with you live. During the phone call we will ask you to authorise us to look in so that we will be able to help you even better.

6. **Secure environment**
   The world around us is changing and security is really important. Mijn NN Zakelijk has the latest security features to best protect your information (and ours). The General Data Protection Regulation (GDPR/AVG) also sets strict rules for this. We no longer share certain information in Mijn NN Zakelijk as standard. More was available in the old environment but now, for example, no information on addresses or partners is displayed. Nationale-Nederlanden has an interface with the BRP (Personal Records Database, formerly the GBA) and we are not allowed to share data from it.
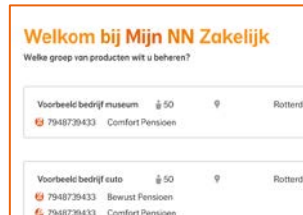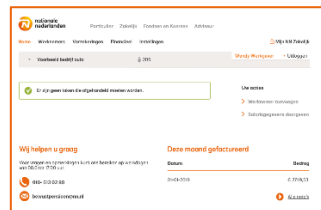
Logging in
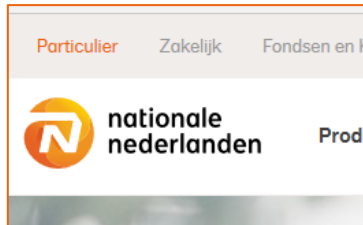
✓ In nn.nl, select Zakelijk.

✓ Click on Inloggen (top right in the screen).

✓ Use your existing user name and password.

Home page

✓ On the home page, you see a list of all the schemes you can manage.
✓ Click on a tile to open the management portal.

✓ On the Mijn NN Zakelijk home page, you see a summary of the outstanding tasks, common activities and important information.

✓ Click on the grey bar to return to the previous screen or where appropriate select another scheme.

✓ You see important tasks, such as a failure when registering a new employee, here.

✓ On the home page you can:
  - add a new employee;
  - add several employees at the same time;
  - report several employees leaving at the same time;
  - update several salaries and/or part-time percentages at the same time.

  If you only want to change the salary details of one employee, click on Werknemers and then the employee concerned so you can make this individual update.

  (There is more information on these updates below)

✓ You see the amount billed this month.
✓ Click on Alle nota's to download the billing statement (pdf) and the breakdown (csv). You can also find all the billing statements in the Financieel tab.

Access management

General

You can add users in Mijn NN Zakelijk. This could be a member of your organisation's HR staff or an external adviser or trust office. **Important:** At the moment it is not possible to set up roles and authorities. As a result, anyone you add now will be able to make updates. We will adjust this in the course of 2020.

✓ Click on the Instellingen tab.

✓ You are now in the Instellingen tab. All users are displayed on this page. Click on Gebruiker toevoegen to add a new user.

✓ Clicking on Gebruiker toevoegen opens a screen showing the user information you can input. Input the user's details and click on Toevoegen. You can create your own user name.

✓ The new user receives an email which gives the user name you have created and then creates a password and can log into Mijn NN Zakelijk straight away.

Employees

Naam
Akker, J. van dan
Arts, M.A.G.
Beek, R. van der
Berg, P.P.M. van den

Uw acties

> Werknemer toevoegen
> Werknemersoverzicht downloaden
> Meerdere werknemers toevoegen
> Meerdere werknemers uit dienst melden
> Meerdere salarissen en parttime percentages doorgeven
> Mutatieoverzicht downloaden

✓ All active employees are displayed under Werknemers along with their monthly premiums.

✓ Non-active employees can be seen in the employee list for up to one year so that you can check that the leaving date has been processed correctly.

✓ Click on the employee for more information and to manage that employee.

✓ You can add an employee to the workforce from the list of employees.

✓ Click on download a list of employees to get a CSV file listing information your employees. This file shows the accrued entitlements/insured amounts, total premiums and a breakdown of the cover for each employee.

✓ Click on Meerdere werknemers toevoegen to download a template for information to register several employees at the same time.

✓ This also applies to Meerdere werknemers uit dienst melden. Here you download a template you can use to input several employees who are leaving at the same time. You can then upload it.

✓ Click on Meerdere salarissen en parttime percentages doorgeven to input new salary information for several employees at the same time.

✓ Click on Mutatieoverzicht downloaden to review the updates you have sent via Mijn NN Zakelijk. This list does not gives status information but acts as a logbook so that you can clearly see at any time what updates (and the related values) you have sent and when.

Adding an employee

Basic information

✓ Complete the information for the new employee. All fields are mandatory and so are marked *.

✓ If an employee is married, in a registered partnership or cohabiting (meeting the definition of a partner) click on Ja in the question Is er een partner bekend?

✓ An additional tab - Partnergegevens - is displayed.

✓ If the unspecified partner system is in use, the question Is er een partner bekend? is not displayed.

✓ Complete the employment starting date and click on Volgende.

Partner information (if there is a known partner)

✓ State the civil status in Burgerlijke staat.

✓ In the case of a marriage or registered partnership, we will retrieve the partner's information from the BRP. You do not need to input any further information.

✓ We cannot retrieve this information for a cohabiting partner and so you have to input the information manually.

✓ Click on Volgende.

Schemes

- ✓ You see which voluntary and mandatory schemes the employee is registered for.
- ✓ Complete the additional information such as the Burgerservicenummer and the date the schemes have to take effect.
- ✓ Click on Volgende.

Salary information

- ✓ Input the salary information and part-time percentage.
- ✓ You can also input part-time salaries or salaries per week or four weeks.
- ✓ The salary is always converted into a full-time annual salary that is processed in our records. You see this amount in the Berekende basissalaris field.
- ✓ Click on Aanmelden to register the employee. Important: The update is sent immediately. You can click on Terug to check what you have input. What you have input remains in place.

Adding several employees

Uw acties

> Werknemer toevoegen
> Meerdere werknemers toevoegen
> Meerdere werknemers uit dienst melden
> Meerdere salarissen en parttime percentages doorgeven

Open updates
- ✓ Click on Meerdere werknemers toevoegen in Uw Acties.
- ✓ Updates can be opened in the Home page or from the Werknemers page.
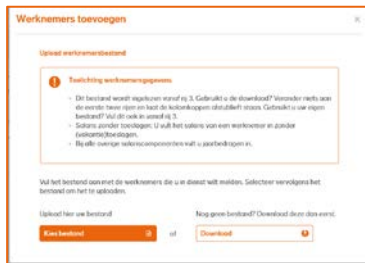
- ✓ <u>Step 1</u>: Click on Download to download the employee file upload (template).
- ✓ This screen explains how the template has to be completed in Toelichting Werknemergegevens.
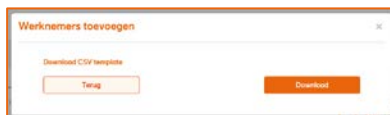
- ✓ <u>Step 2</u>: Click on Download.
  A pop-up appears so that you can download the file.

- ✓ <u>Step 3</u>: Fill in the information for the new employees in the file.
- ✓ Do not change anything in the first two rows and do not delete the column headings. If you are using your own file, complete this from row 3.
- ✓ The file shows the salary information we expect. If necessary read the notes on how to complete these fields (see step 1).
- ✓ <u>Step 4</u>: Save the file to your local disk.
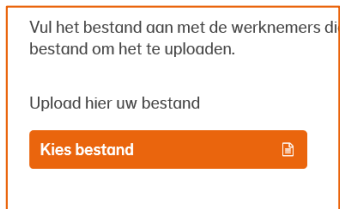
✓ Step 5: Click on Kies bestand to select the file and click on Openen.

✓ Step 6: Check that the right name is shown in the Geselecteerde bestand field. Click on Verwerken.

✓ Step 7: The uploaded file is checked. You will receive feedback on the result. If there is a mistake, correct it in the file and upload the file again.

✓ Step 8: If there are no mistakes, the screen displays a summary of the updates. Click on Bevestigen to process them in Nationale-Nederlanden's records.

Employee page

✓ The Werknemerpagina page no longer displays any address or partner information because we are using information from the BRP and cannot share it with third parties.
✓ You will, however, see whether the employee has a partner listed in our records.

✓ You can see at a glance what the employee is insured for and the related total premium.

✓ Click on the Maandelijkse Premie bar to open the drop-down.
✓ The drop-down displays more information, such as policy numbers and product names.
✓ It also displays the breakdown of the premium for the various products and insurance cover.

Updates for one employee

General

Nationale-Nederlanden uses a BRP interface and so you no longer need to provide the following updates:
- ✓ Marriage/registered partnership
- ✓ Divorce/end of registered partnership
- ✓ Death
- ✓ Address update unless abroad

Nationale-Nederlanden also uses a UWV interface and so you no longer need to provide the following updates:
- ✓ Occupational disability

The disability interface submits new registrations, updates and recoveries. You see the employee's disability percentage and the effect on the premium.

Important: if you have a Persoonlijk Pensioen Plan (formerly through Pensioen Services Online), we only receive reports of a change in disability percentage from the UWV. We are not notified by the UWV when an employee has been ill for two years. You have to report this to us yourself. See the 'Reporting disability in the Persoonlijk Pensioen Plan' event card.

You do have to submit the following updates:

Salary/part-time percentage update
- ✓ Input the new salary information here. If there are separate salary elements, these fields are also displayed.
- ✓ Input the new part-time percentage.
- ✓ Click on Mutatie verwerken to process them in Nationale-Nederlanden's records.

Employee leaving
- ✓ Input the first day that the employee is no longer employed. For example: Ms J. van den Akker leaves on 31 October 2020. The first day that she is no longer employed is 1 November 2020. Fill that date in.
- ✓ Click on Mutatie verwerken to process it in Nationale-Nederlanden's records.

Registering a partner (including cohabitation)
(where there is specified partner cover)
- ✓ Register a cohabiting partner with us as we do not get this information from the BRP.
- ✓ Complete the information on the cohabiting partner and the date from which the partner should be registered for a partner's pension.
- ✓ Click on Mutatie verwerken to process it in Nationale-Nederlanden's records.

Registering/deregistering for voluntary Anw shortfall pension for a Comfort Pensioen or a Persoonlijk Pensioen Plan (formerly Bewust Pensioen)

- ✓ Send an email to your client manager to insure the Anw shortfall pension. Deregistration is done using the Afstandsverklaring Anw-hiaatpensioen form (0.1 mb) that can be downloaded from: https://www.nn.nl/Zakelijk/Pensioen/Persoonlijk-Pensioen-Plan-1.htm#tab:a825b34e-b6c6-46f1-af26-5ee458c767e9-3. Send the signed and completed form to your client manager.

Registering/deregistering for voluntary Anw shortfall pension for a Persoonlijk Pensioen Plan (formerly through Pensioen Services Online)

- ✓ If you have an opt-out scheme, the Anw shortfall pension is insured if you register the partner. You register the employee through the portal. If you have an opt-in scheme, send an email to your client manager to insure the Anw shortfall pension.
- ✓ Deregistration is done using the Afstandsverklaring Anw-hiaatpensioen form (0.1 mb) that can be downloaded from https://www.nn.nl/Zakelijk/Pensioen/Persoonlijk-Pensioen-Plan-1.htm#tab:a825b34e-b6c6-46f1-af26-5ee458c767e9-3. Send the signed and completed form to your client manager.

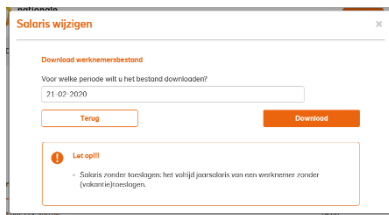**Reporting a foreign address or marriage or a foreign employee**
Send us this information to your client manager as we do not receive it from the BRP.

Updates for a group of employees

Submitting several salaries
- ✓ <u>Step 1</u>: Click on Meerdere salarissen en parttime percentages doorgeven. Click on Download to download the employee file.

- ✓ <u>Step 2</u>: If necessary, alter the date for generating the employee file (for example, 1 January of the current year) and click on Download. A pop-up appears so that you can download the file.

- ✓ <u>Step 3</u>: Complete the new salary information in the file. You do this for the entire employee file.

- ✓ <u>Step 4</u>: Save the file to your local disk.

✓ Step 5: Click on Kies bestand to select the file and click on Openen.

✓ Step 6: Check that the right name is shown in the Geselecteerde bestand field. Input the date that the new salary information has to take effect. Click on Verwerken.

✓ Step 7: The uploaded file is checked. You will receive feedback on the result. If there is a mistake, correct it and upload the file again.

✓ Step 8: If there are no mistakes, the screen displays a summary of the updates. Click on Bevestigen to process them in Nationale-Nederlanden's records.
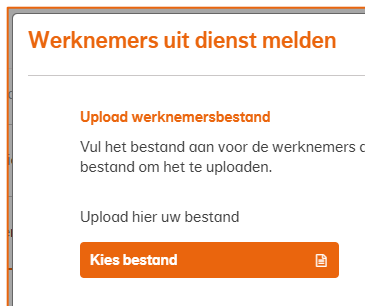
Reporting several employees as leaving

✓ Step 1: Click on Download to download the employee file and click on Download again in the following screen.

✓ Step 2: Complete the leaving date in the file. You only do this for the employees who are leaving.

✓ Step 3: Save the file to your local disk.
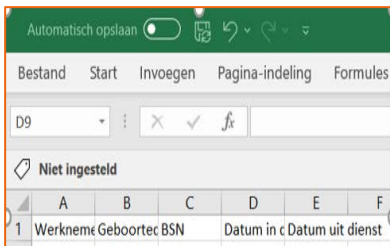
✓ Step 4: Click on Kies bestand to select the file and click on Openen.

✓ Step 5: Check that the right name is shown in the Geselecteerde bestand field. Input the date that the new salary information has to take effect. Click on Verwerken.

✓ Step 6: The uploaded file is checked. You will receive feedback on the result. If there is a mistake, correct it and upload the file again.
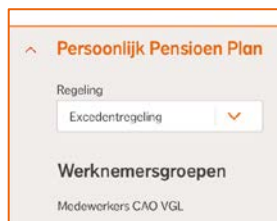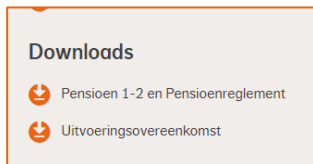
Insurance

✓ The Verzekeringen page displays the collective insurance policies you can manage.

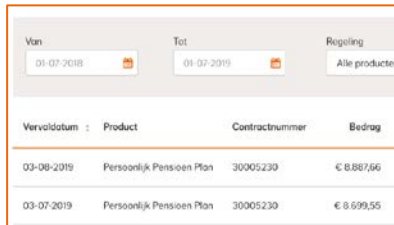✓ The drop-down shows key information on each product in the pension scheme, such as the offset and any rate bands.

✓ If you have several schemes, you can review the others in the drop-down.

✓ Pensioen 1-2 or the Pension regulations and the Administration agreement are available as downloads.
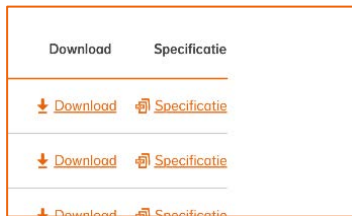
✓ Any addendums can also be downloaded.

Financial

✓ This is where to see a list of all billing statements and related breakdowns issued up to then.
✓ These can be filtered by product and period.

✓ You can download the billing statement, which meets the tax authorities' requirements, as a pdf.
✓ You can also download a breakdown that shows how the amount of the direct debit was calculated. This is a csv file that you can convert into Excel so that you can carry out checks.