

Guide to using analysis codes



Guide to using analysis codes

Analysis codes allow plan administrators to add additional fields to record useful information, unique to your company. This type of information can be used by you for further analysis of the plan membership although it will not be used by Zurich. Maintenance of the codes is the plan administrator's responsibility.

Managing analysis codes

Analysis codes can be found under the Plan administration menu accessed via the Administration link on the ZIO global navigation bar.

ZURICH
Administration | Plan information | Reports | Tools | Inbox | Workflow

Administration > Plan administration > Manage analysis codes

Manage analysis codes

123456 - Company One

Member analysis codes

Policy analysis codes

Below is a list of analysis codes that are available to be assigned to your members. To add a new code for a particular policy type, click 'Add new analysis code' on the top right of the screen. To view the codes available for a specific policy type, select the policy type and click 'Filter'. To edit an existing code, click 'Edit'. To delete a code, click 'Delete'. You can only delete a code if no values have been added for that code.

Filter options

Policy type [EE "Additional Voluntary Contributions"]

Analysis code	Type	Options
asdasdas	String	

Upload analysis code data

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Member analysis codes allow you to store data against a member.

Policy analysis codes allow you to store data against a policy

Clicking on either of these options allows you to Add , Edit or Delete codes using the icons shown on the page. Note that you can only delete codes that have not already been used within the plan.

Analysis code	Type	Options
Date Analysis Code	Date	
Numeric Analysis Code	Numeric	
Percentage Analysis Code	Percentage	
String Analysis code	String	
Test	Date	

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Add new analysis code

When adding a new member analysis code, you will need to give your code a title and select a code type.



The screenshot shows a form titled "Add Analysis code". It has a text input field for "Analysis code" and a dropdown menu for "Code type" with "String" selected. At the bottom are "Cancel" and "Save" buttons.

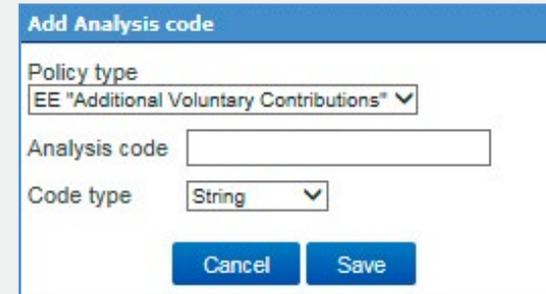
Below is a list of the code type and data allowed:

- String – any selection of numbers/letters/characters
- Numeric – numbers only
- Percent – numbers only and will be shown as a percentage
- Date

Please be aware that the use of certain special characters and symbols are not allowed in the analysis fields. These characters are detailed below

! £ \$ € % ^ = ; # ~ ? > < é á í @ &

The process is the same for adding a new policy analysis code; though you will additionally need to specify which policy type you wish to add the code against



The screenshot shows a form titled "Add Analysis code". It has a dropdown menu for "Policy type" with "EE 'Additional Voluntary Contributions'" selected, a text input field for "Analysis code", and a dropdown menu for "Code type" with "String" selected. At the bottom are "Cancel" and "Save" buttons.

Once you have created an analysis code, you have two options:

Option 1: Create a template and upload the data in bulk.

This option is best used when updating a large number of member analysis codes or policy analysis codes – you just need to select the correct template type from the list available



The screenshot shows a "Manage analysis codes" interface. At the top is a dropdown menu showing "123456 – Company One". Below are three main sections: "Member analysis codes" with a right arrow, "Policy analysis codes" with a right arrow, and "Upload analysis code data" with a checkmark. Under "Upload analysis code data" are three sub-options: "Create member analysis code template", "Create policy type analysis code template", and "Upload analysis code data".

Clicking on either the 'member analysis code template' or the 'policy type analysis code template' will place a csv format template in your 'Inbox' which will list all the members or policies within the plan (depending on the template type chosen)

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You will then need to add the analysis code data into the correct column in the spreadsheet and then save the file (ensuring the file format remains CSV). You then use this template as an upload file (see section **'Upload analysis code data'**).

	A	B	C	D	E	F	G	H	I
1	MemberID	Payroll reference	Surname	Forename	Gender	Date of birth	Salary	Risk Cover	
2	200000226	5899	Adams	Abdil	M	20/06/1960	1	Yes	
3	200000227	9235	Alberts	Jonas	M	01/07/1960	2	No	
4	200000228	9224	Alder	Ivan	M	12/07/1960	3	No	
5	200000229	9777	Allan	Axel	M	20/07/1961	4	Yes	
6	200000230	9999	Alonso	Paul	M	14/07/1961	5	Yes	
7	200000231	9282	Amin	Michelle	F	05/05/1948	6	No	
8	200000232	9261	Anders	Colton	M	26/05/1955	7	No	
9	200000233	9233	Andersson	Mary	F	03/08/1956	8	Yes	
10	200000234	9255	Antony	Sook	M	06/04/1949	9	Yes	
11	200000235	9250	Atta	Isao	F	11/04/1965	10	No	
12	200000236	9270	Azam	Abby	F	17/05/1960	11	No	
13	200000237	5888	Azim	Ansari	M	22/07/1955	12	Yes	
14	200000238	9230	Bennet	John	M	06/07/1978	13	Yes	

When creating an upload file at policy level, you will first need to select the **'Policy type'**, before creating the template.

Manage analysis codes

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Member analysis codes

Policy analysis codes

Filter options

Policy type: AVC

Analysis code	Type	Options
Regular Contribution Funding Rate	Percentage	/
Regular Contribution Level	String	/

The policy level upload works in the same way, though the information is stored against the applicable policy type.

	A	B	C	D	E	F	G	H	I	
MemberID	Payroll reference	Surname	Forename	Gender	Date of birth	Policy Number	EMPLOYER	Salary	EMPLOYER	Risk Cover
200000226	5899	Adams	Abdil	M	20/06/1960	1004019				
200000227	9235	Alberts	Jonas	M	01/07/1960	1004035				
200000228	9224	Alder	Ivan	M	12/07/1960	1004052				
200000229	9777	Allan	Axel	M	20/07/1961	1004078				
200000230	9999	Alonso	Paul	M	14/07/1961	1004094				
200000231	9282	Amin	Michelle	F	05/05/1948	1004116				
200000232	9261	Anders	Colton	M	26/05/1955	1004132				
200000233	9233	Andersson	Mary	F	03/08/1956	1004159				
200000234	9255	Antony	Sook	M	06/04/1949	1004175				
200000235	9250	Atta	Isao	F	11/04/1965	1004192				
200000236	9270	Azam	Abby	F	17/05/1960	1004213				

Important points regarding the upload process: If you are only updating a select number of members, you can remove any rows containing members you are not updating. This is important as if the fields are left blank, it will overwrite any information held with blank information.

If a single analysis code column is to be updated, you can remove any additional analysis code columns. For example, if you were only updating the 'Risk Cover' in the above file, you could delete the salary column. The upload would then only update the 'Risk Cover' for the members in the file.

It is important to note that you should not amend any information in columns A to F, as this information is used as part of the validation and any changes will cause the upload to error.

We would recommend maintaining a master template to enable you to track any changes you make. Further information on how to review the analysis code information can be found in the 'Reviewing all Analysis code information' section of this guide.

Once you are happy with your data, this can be uploaded by selecting the **'Upload analysis code data'**.

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Option 2: Manually updating analysis codes

This option is used when you wish to update a single or small number of members individually and is accessed via the individual member details page.

From here you can view, add, delete or edit member and policy analysis codes.

Reviewing all analysis code information

To review all the analysis code information held at a scheme level without having to look at each member individually, simply access the Member list, apply any required filters and then Download the search results to csv file.

Member list

Advanced search >

Search

Plan: 123456 - Company One

Location: Location 2

Member name: Plan

Employee ID:

Date of birth: dd / / yyyy

Search

Employee ID	Member name	Sex	Date of birth	Location
123456	Member 1, Plan	Male	18/01/1974	Location 2
246246	Member 4, Plan	Male	15/09/1985	Location 2

Download search results to csv file

This will create a CSV excel file which can be retrieved from your Inbox (found at the top of your screen).

Address II	Address II	Post code	Country address	Currency	Annual Salary	ID certifie	Address o	Employment commenced	Employment Scheme	jc Schen
				GBP	77525					
				GBP	77525					
				SEK	748722					
				SEK	748722					
				GBP	56041					
				GBP	56041					
				EUR	97148					
				EUR	97148					
				GBP	85558					
				GBP	85558					
				NOK	596835					
				NOK	596835					
				USD	152962.92					
				USD	152962.92					
				USD	144000					
				USD	144000					
				AUD	206876					
				AUD	206876					
				GBP	106738					
				USD	103362					
				USD	103362					
				CHF	92127					
				CHF	92127					
				EUR	94775					

The analysis code columns will always be found after the 'Country address' column.

If you require any assistance or have any questions regarding analysis codes, please do not hesitate to contact your Zurich representative or alternatively, the Zurich Corporate HelpPoint Team using the details below:

For Zurich International Life Limited policies calling from outside the UAE:
+44 (0) 1624 691013

For Zurich International Life Limited policies if calling from the UAE:
+971 4363 4400

Or for all policies, please email: corporate.pensions@zurich.com



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Branch offices: 27th Floor, Almoayyed Tower, Seef District, Kingdom of Bahrain.

Telephone +973 1756 3322.

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Registered offices at Unit 601, Building 6, Emaar Square, Dubai. (PO Box 50389 Dubai)

Telephone: +971 4 425 2300 www.zurich.ae

Zurich International Life Limited, Qatar Branch, which is authorised by the Qatar Financial Centre Regulatory Authority.

Branch offices: Office No. 404, 4th Floor, Qatar Financial Centre Tower, West Bay, Doha, Qatar.

Telephone: + 974 4428 6322.

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Registered in the Isle of Man number 20126C.

Registered office: Zurich House, Isle of Man Business Park, Douglas, Isle of Man, IM2 2QZ, British Isles.

Telephone +44 1624 662266 Telefax +44 1624 662038 www.zurich.com