

GEMINI Collective Foundation

## CONNECT FOR EMPLOYERS INSTRUCTIONS

January 2023

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# 1 Purpose

Connect is the employer portal of the GEMINI Collective Foundation (hereinafter referred to as Foundation). This document sets out the processes that can be managed via Connect and describes the functions of the portal.

## 2 General points

### 2.1 Homepage and navigation

The Connect homepage provides useful information and links as well as the name and details of your contact person at the Foundation.

The header at the top of the screen lists various functions as well as your documents and settings.



#### 1. Navigation

Use the menu symbol to show and hide the navigation column on the left margin of the screen.

#### 2. Logo

Click on the logo to return to the homepage.

#### 3. Quick selection

Shows which Connect for employers you are using. You can switch between different affiliations via the quick selection in the drop-down list. This applies if you are responsible for several companies.

#### 4. Tasks

Shows the changes and notifications you have initiated or cached. Various filter criteria make it easier for you to find the tasks you are looking for. You can call up your cached changes and notifications with a double click and continue to edit them.

#### 5. Messages

Lists all documents for your use in chronological order. Filter criteria make it easier for you to find the documents you are looking for.

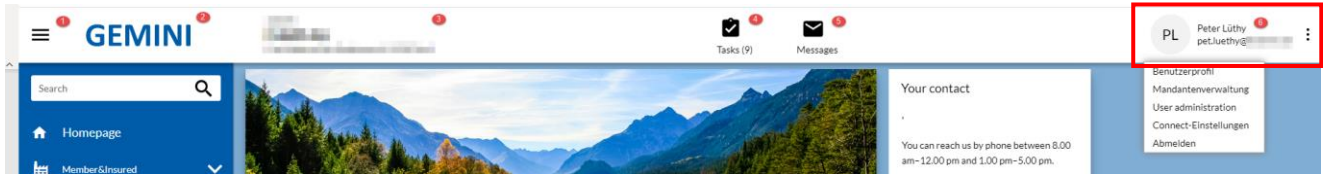
As soon as a new document arrives, all users you have registered will receive an automated e-mail with the subject "New information in your connect" from noreply@avadis.ch.

#### 6. Three-dot menu

Click on your user name or the three-dot menu to open the user settings or log out of Connect. Details regarding the user settings can be found in the "User settings" chapter.

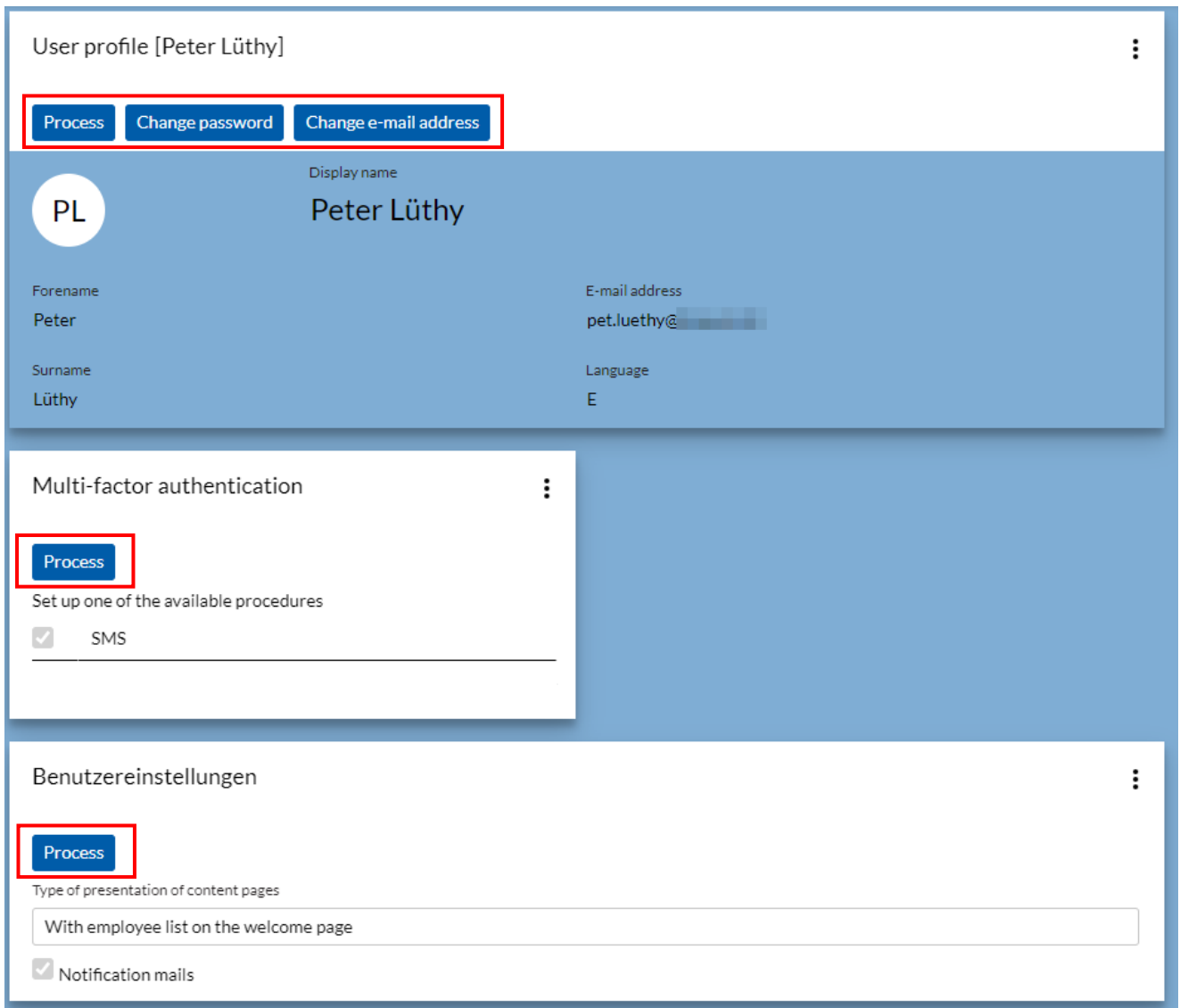
## 2.2 User settings

The header on the right shows the user name you are using.



### 2.2.1 User profile

You can edit your user settings in the user profile.



### Edit: user name and language setting

You can change your user name and the language setting for your Connect account via the "Edit" button. Please note that these changes will not become active until the next user name.

### Change password

Click "Change password" to create a new password.

### Change e-mail address

Click on "Change e-mail address" to enter a new e-mail address.

### Multi-factor authentication

For security reasons, two-factor authentication is required to log in to your Connect account. Since this involves two separate elements, you must provide a mobile number when registering.

## 2.2.2 Client management

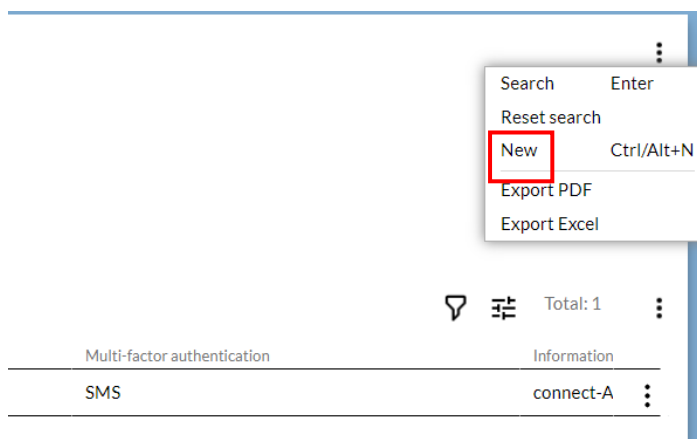
The client management section lists the user accounts to which you have access. The list is the same as the quick selection in the drop-down menu shown in the title bar. You can give the individual clients an alias, which will be displayed in the quick selection.

## 2.2.3 User management

Manage the Connect users under "User management". To do this, you need to hold the Connect administrator rights.

### Enter new users

Click on "New" in the three-dot menu in the top right-hand corner to access the data entry interface.



Forename, last name, e-mail address, user name and language are mandatory fields. You can choose individual subject authorisations for each user. With the "Connect administrators" authorisation, you can enter, delete and edit users. The checkbox for the "Welcome e-mail" must be activated to ensure that newly registered users immediately receive an e-mail to guide them through the login process.

### User detail ⋮

**Process**

Forename

Surname

E-mail address

Login

Blocked until   Disabled

Language ?

**▼ Authorisation**

X	Name	Description
<input checked="" type="checkbox"/>	connect-Administrators	Admin by the customer: can add other connect Users
<input checked="" type="checkbox"/>	Berufliche Vorsorge	PW 2.0 Berechtigung für Thema "Berufliche Vorsorge"
<input checked="" type="checkbox"/>	Accounting	connect-SE authorisation for the area Accounting
<input checked="" type="checkbox"/>	Other transactions	connect authorisation for the area Other transactions
<input checked="" type="checkbox"/>	Interface partner	Authorised group to control the menu permissions for the interface partner in the PartnerWeb.

**▼ Multi-factor authentication**

SMS

## Edit user

Select the relevant user with a double click or via the "Detail" button.

Benutzerverwaltung search ⋮

Detail Search Reset

▼ Search

Text  Incl. deactivated

▼ Results 🔍 ⚙️ Total: 1 ⋮

<input type="checkbox"/>	Display name	E-mail address	Language	Disabled	Reference	Multi-factor authentication	Information
<input type="checkbox"/>		r	E	<input type="checkbox"/>		SMS	connect-A <span style="float: right;">⋮</span>

Edit the forename, last name, e-mail address, user name, language and authorisations by clicking on "Edit".

User detail ⋮

Process

Forename

Surname

E-mail address

Login

Blocked until   Disabled

Language ?

▼ Authorisation

X	Name	Description
<input checked="" type="checkbox"/>	connect-Administrators	Admin by the customer: can add other connect Users
<input checked="" type="checkbox"/>	Berufliche Vorsorge	PW 2.0 Berechtigung für Thema "Berufliche Vorsorge"
<input checked="" type="checkbox"/>	Accounting	connect-SE authorisation for the area Accounting
<input checked="" type="checkbox"/>	Other transactions	connect authorisation for the area Other transactions
<input checked="" type="checkbox"/>	Interface partner	Authorised group to control the menu permissions for the interface partner in the PartnerWeb.

▼ Multi-factor authentication

SMS

Back

## Block user

Select the "Disabled" checkbox to block users from Connect.

### User detail

**Process**

Forename

Surname

E-mail address

Login

Blocked until

Disabled

Language ?

#### ▼ Authorisation

X	Name	Description
<input checked="" type="checkbox"/>	connect-Administrators	Admin by the customer: can add other connect Users
<input checked="" type="checkbox"/>	Berufliche Vorsorge	PW 2.0 Berechtigung für Thema "Berufliche Vorsorge"
<input checked="" type="checkbox"/>	Accounting	connect-SE authorisation for the area Accounting
<input checked="" type="checkbox"/>	Other transactions	connect authorisation for the area Other transactions
<input checked="" type="checkbox"/>	Interface partner	Authorised group to control the menu permissions for the interface partner in the PartnerWeb.

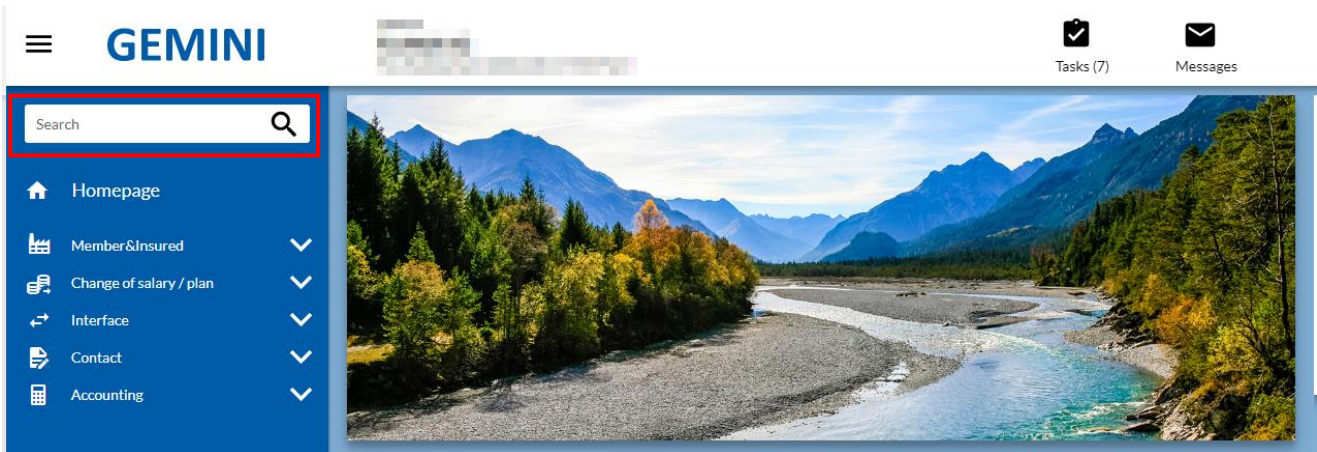
#### ▼ Multi-factor authentication

<input checked="" type="checkbox"/>	SMS
-------------------------------------	-----



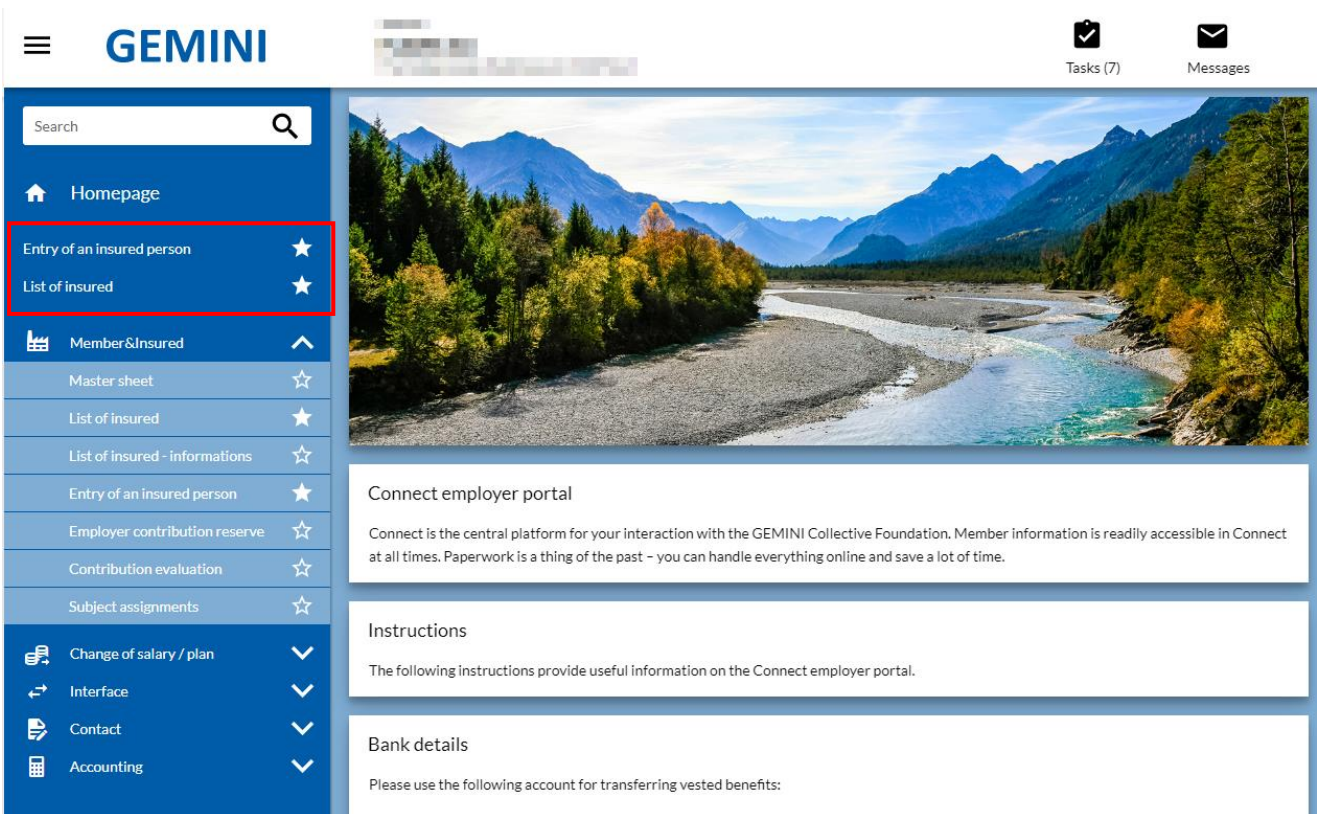
## 2.3 Search

Use the search function in the top left-hand corner to search for specific employees. The results are presented in order in various tabs. In the "List of insured persons" tab, you can enter changes and notifications directly for individual employees. To do this, click on the three-dot menu on the right margin of the line.



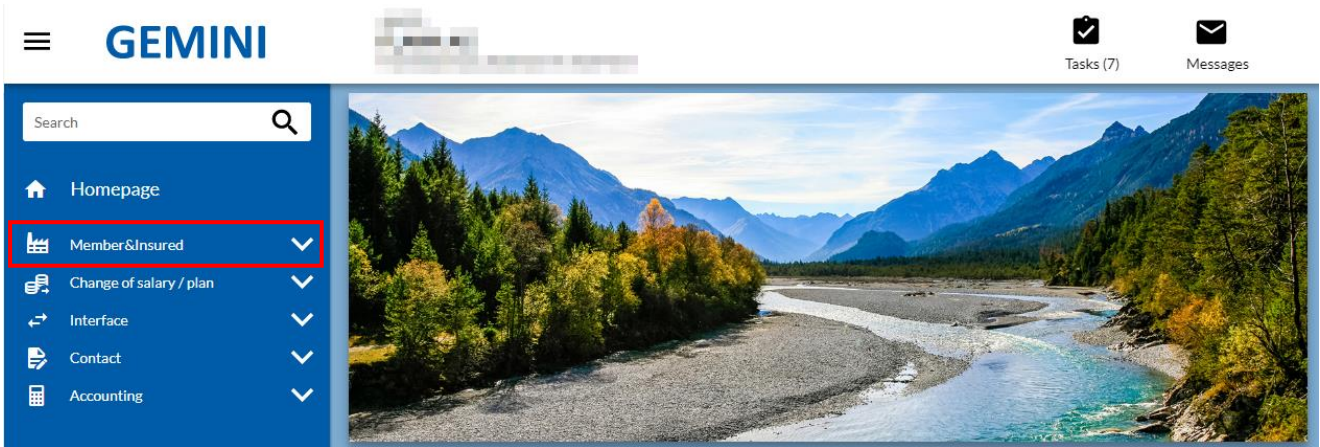
## 2.4 Favourites

Click on the star to mark frequently used menu items as favourites. The items will be listed above the navigation to make it easier for you to find them. Click on the star again to deactivate the favourite status.



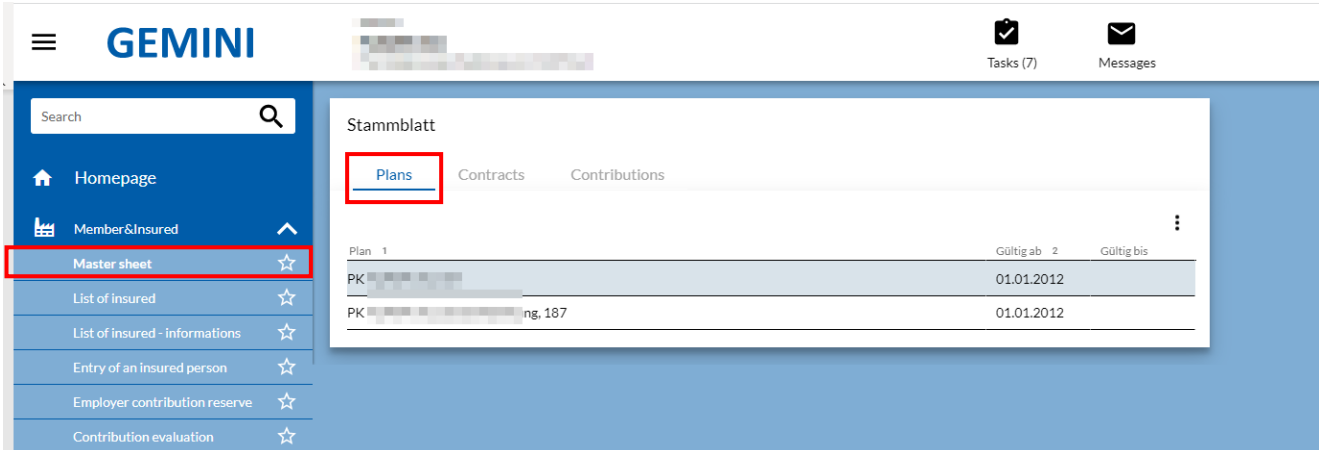
### 3 Member & insured persons

Details of your employees can be found under "Members & insured persons". You can enter and submit changes like salary or address changes.



#### 3.1 Master sheet

The master sheet provides information on plan allocations, contracts and settlement conditions as well as invoiced contributions.



## 3.2 List of insured persons

The list of insured persons provides an overview of all of your employees. Submit the changes (3.2.1 to 3.2.11) and notifications listed below to the Foundation by opening the context menu for a specific employee (right-click or two-finger click) or via the three-dot menu on the right-hand side.

The screenshot shows the GEMINI web application interface. The main content area is titled 'Versichertenliste' and contains a table of insured persons. The table has the following columns: Name, Vorname, AHV-Nummer, Geburtsdatum, Bezeichnung, Valid from, and Valid until. A context menu is open over the table, listing various actions such as 'Insured details', 'Salary change', 'Change of plan', 'Exit report', 'Contribution simulation', 'Adressänderung', 'Personalienänderung', 'Zivilstandsänderung', 'Notification of incapacity for work', 'Retirement', and 'Notification of death'. The 'List of insured' option in the left sidebar is highlighted with a red box.

Name	Vorname	AHV-Nummer	Geburtsdatum	Bezeichnung	Valid from	Valid until
[REDACTED]	[REDACTED]	754 [REDACTED]	18.01.1994	PK [REDACTED]	01.09.2021	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	14.09.1969	PK [REDACTED]	01.01.2015	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	09.12.1982	PK [REDACTED]	01.04.2022	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	11.09.1984	PK [REDACTED]	01.01.2015	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	04.04.1963	PK [REDACTED]	01.01.2015	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	20.08.1972	PK [REDACTED]	11.03.2015	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	10.05.1981	PK [REDACTED]	01.01.2015	[REDACTED]
[REDACTED]	[REDACTED]	754 [REDACTED]	25.07.1994	PK [REDACTED]	01.01.2015	[REDACTED]

### Processing of changes

The Foundation processes changes on a pro rata basis.

Use the "Export PDF" button to download the list as a PDF file. You can generate an XLS file by clicking on the three-dot menu and then on "Export Excel".

The screenshot shows the GEMINI web application interface. The top navigation bar includes the GEMINI logo, a search bar, and user information (Peter Lüthy, pet.luethy@...). The left sidebar contains a navigation menu with items like 'Homepage', 'Member & Insured', 'Master sheet', 'List of Insured', 'List of Insured - informations', 'Entry of an insured person', 'Employer contribution reserve', 'Contribution evaluation', 'Subject assignments', 'Change of salary / plan', and 'Interface'. The main content area displays the 'Versichertenliste' (List of Insured Persons) page. It includes a search bar and a table with columns for Name, Vorname, AHV-Nummer, Geburtsdatum, Bezeichnung, Valid from, and Valid until. The 'Export PDF' button is highlighted with a red box.

Name	Vorname	AHV-Nummer	Geburtsdatum	Bezeichnung	Valid from	Valid until
[REDACTED]	[REDACTED]	756. [REDACTED]	18.01. [REDACTED]	PK [REDACTED]	01.09.2021	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	14.09. [REDACTED]	PK [REDACTED]	01.01.2013	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	09.12. [REDACTED]	PK [REDACTED]	01.04.2022	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	11.09. [REDACTED]	PK [REDACTED] schäftsleitung	01.01.2019	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	04.04. [REDACTED]	PK [REDACTED]	01.01.2013	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	20.08. [REDACTED]	PK [REDACTED] schäftsleitung	11.03.2019	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	10.05. [REDACTED]	PK [REDACTED]	01.01.2013	[REDACTED]
[REDACTED]	[REDACTED]	756. [REDACTED]	25.07. [REDACTED]	PK [REDACTED]	01.01.2013	[REDACTED]

### 3.2.1 List of insured persons – information

Provides all relevant information regarding employee benefits.

### 3.2.2 Change of salary

Salary changes can be made directly via the list of insured persons.

### 3.2.3 Change of plan

Allows you to report a change of plan for employees. The process is the same as for the change of salary. You can enter a valid-from date in the second section.

### 3.2.4 Notification of departure

Before an employee leaves the Foundation, please check the address (under List of insured persons – information) and amend it if necessary. When employees leave the Foundation, all employment policies (all contracts) they hold with the Foundation are terminated.

The question about the ability to work must be answered in the affirmative, except in the case of total incapacity for work or disability.

The screenshot shows a web application interface for managing employee exit data. The interface includes a search bar at the top left, a navigation menu on the left, and a main content area. The main content area has a progress indicator with two steps: 'AHV-Nummer und Austrittsdatum' (completed) and 'Austrittsdetails' (current step). Below the progress indicator, there are several form fields for entering employee details. A red box highlights the 'Arbeitsfähigkeit\*' dropdown menu, which is currently set to '-'. The form fields include:

- Search bar
- Navigation menu: Homepage, Member&Insured, Master sheet, List of insured, List of insured - informations, Entry of an insured person, Employer contribution reserve, Contribution evaluation, Subject assignments, Change of salary / plan, Interface, Contact, Accounting.
- Search bar: Search
- Page title: Austritt (PK) [redacted], 756 [redacted]
- Instruction: Kompletieren Sie die Angaben zum Austritt. Klicken Sie anschliessend auf 'Prüfen'.
- Progress indicator: AHV-Nummer und Austrittsdatum (completed), Austrittsdetails (current)
- Section: Versicherte Person
- Form fields: OASI number (social security number) [756...], Geburtsdatum [18.01.], Geschlecht [male], Name [redacted], Vorname(n) [redacted]
- Section: Austrittsmeldung
- Form fields: Austrittsdatum \* [31.01.2023], Austrittsgrund \* [Regular], Arbeitsfähigkeit \* [-]
- Section: Bemerkungen
- Form field: [empty]

### 3.2.5 Change of personal data

Change employee details here (e.g. surname).

### 3.2.6 Change of address

Change employees' addresses here.

### 3.2.7 Change of marital status

Change employees' marital status here.

### 3.2.8 Notification of incapacity for work

You can enter the complete notification of incapacity for work on Connect and upload the necessary documents. If you would like to send the Foundation additional documents after having registered the incapacity for work, please use the contact form.

#### Arbeitsunfähigkeitsmeldung [Exempel, Ricola, 756.3437.3289.85]

Erfassen Sie den Verlauf des Erwerbsunfähigkeitsgrads und klicken Sie anschliessend auf 'Prüfen'

● — ○  
AHV-Nummer und Beginn der      Arbeitsunfähigkeit

#### Versicherte Person

Name	Exempel	AHV-Nummer	756.3437.3289.85
Vorname	Ricola	Geschlecht	männlich
Geburtsdatum	01.01.2008	Sprache	Deutsch

#### Arbeitsunfähigkeitsgrad

**Zeile hinzufügen**

Gültig ab	Arbeitsunfähigkeitsgrad
03.01.2023	

**Abbrechen**    **Zurück**                      **Zwischenspeichern**    **Prüfen**

#### Confirmation after processing by Foundation

The Foundation will process the case after receiving your notification of incapacity for work. Subsequently, the company and the employee will receive a confirmation via Connect messages. The confirmation contains detailed information, for example on incapacity for work, exemption from contribution payments or invoiced amounts.

### 3.2.9 Retirement

You can enter retirement notifications for employees here. This also requires entry of the retirement date and the degree of retirement.

The format for entering the date is MM.YYYY, with the current year being automatically added to the month entered. The retirement date is the first day of the following month (retirement as at 21.1.2023 = 2.2023).

The retirement form must still be completed.

### 3.2.10 Notification of death

You can register death notifications for employees here. This also requires entry of the date of death.

The death notification form must still be completed

#### Notification of death [., ]

[Delete draft](#)

Progress: OASI number and date of death **Notification of death**

**Insured person**

OASI number	Date of birth	Sex
<input type="text"/>	<input type="text"/>	<input type="text"/>
Last Name	First Name	
<input type="text"/>	<input type="text"/>	

**Event of death**

Date of death ?

[Back](#)

### 3.2.11 Leave

Register unpaid leave for employees here. Besides entering the data regarding the leave, please also enter the contribution type and the financing.

Leave [redacted]

Specify which contributions are to be continued during the break period and how these are to be financed and click on "Check".

●-----○  
 OASI number      Period      Finance

**Insured person**

OASI number (social security number)      Date of birth      Sex  
 [redacted]      18.01. [redacted]      male

Name      First Name  
 [redacted]      [redacted]

**Leave**

Short des.	Effective from	Valid until	Contribution type	Financing
2538 PK [redacted]	01.02.2023	28.02.2023	E_Nur Sparen	Employee

Buttons: Cancel, Back, Cache, Verify

### 3.3 List of insured persons – information

Lists all employees together with information relevant to the employee benefits scheme. You can rearrange the list by clicking on the column titles. The column widths can be adjusted individually by dragging the arrow between the column titles in the desired direction.

If you want to enter a change or notification, go to the "List of insured persons" menu item.

Name	Vorname	AHV-Nummer	Geburtsdatum	Bezeichnung	Valid from	Valid until	ELK	Last reported wage	Wage valid from	Yearly contribution	monatlicher Arbeitnehmerbeitrag	monatlicher Arbeitgeberbeitrag
[redacted]	[redacted]	756 [redacted]	14.08. [redacted]	PK F [redacted]	01.05.2019	31.05.2022	50.00%	50'050.00	01.01.2022	4'951.20	204.30	206.30
[redacted]	[redacted]	756 [redacted]	18.01. [redacted]	PK F [redacted]	01.09.2021		100.00%	89'505.00	01.01.2023	6'475.20	269.80	269.80
[redacted]	[redacted]	756 [redacted]	14.09. [redacted]	PK F [redacted]	01.01.2013		60.00%	31'200.00	01.01.2023	3'163.20	131.80	131.80
[redacted]	[redacted]	756 [redacted]	09.12. [redacted]	PK F [redacted]	01.04.2022		40.00%	39'520.00	01.01.2023	3'866.80	161.20	161.20



### 3.4 Entry of an insured person

A valid OASI number is mandatory for registering new entries. Without the number, entries cannot be registered with the Foundation. Following the registration of a new entry, you will receive a confirmation of registration stating the provisional monthly employee and employer contributions. The Foundation will notify you of the definitive contributions after processing the case.

If the person in question is already registered in the Foundation’s system, the master data will be completed automatically. You can edit the data to update obsolete information or correct errors.

Enter the data relating to the employment relationship, such as the entry date, plan, annual OASI salary, level of employment, capacity for work or disability, in the “Pension scheme” section.

If known, enter the previous employee benefits institution in the "Further information" section. You can also enter information for the Foundation under "Remarks".

▼ **Weitere Angaben**

Bisherige VE

Bemerkungen

Click on "Submit" to generate a registration confirmation that can be sent to the insured person. The registration is not valid without confirmation from the Foundation.

### 3.5 Employer contribution reserve

You can check the outstanding balance of the employer contribution reserve account under the "Employer contribution reserve" item.

### 3.6 Contribution evaluation

You can order a contribution evaluation for a specific period of time here. As soon as the contribution evaluation is available in your messages, you will receive an e-mail with the subject "New information in your connect".

### 3.7 Subject assignments

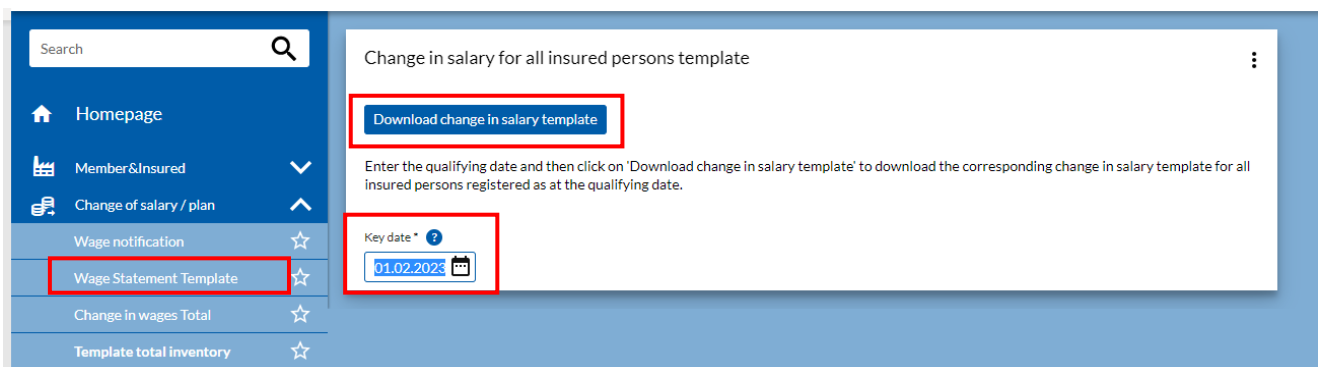
Employees can be assigned a subject (CEO, employer representative, etc.). The official form must still be used for the notification of the pension fund committee.

## 4 Salary notifications

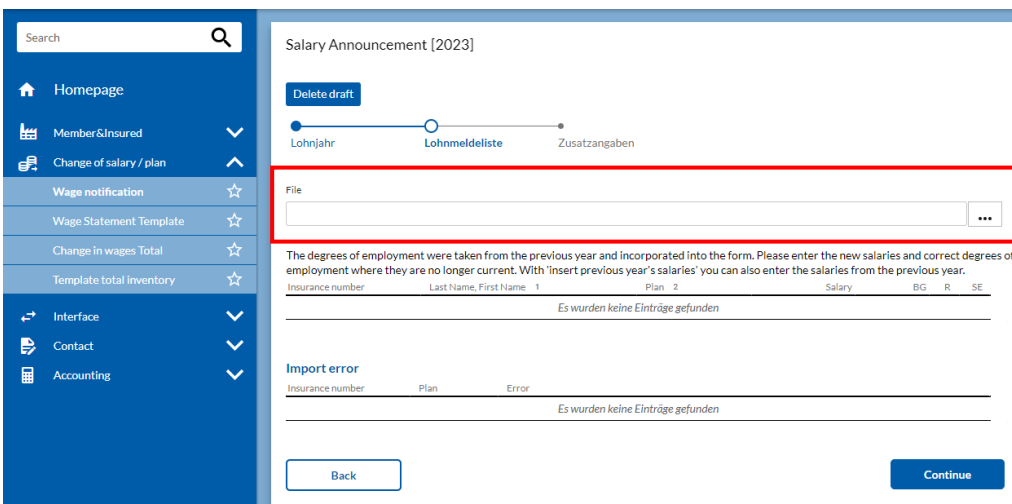
### 4.1 Salary notification

The annual salaries of your employees can be reported via the Salary notification process.

To avoid entering all salaries by hand, you can download a list of the last reported salaries, which can be found under the "Salary notification template" menu item. Enter the new details in the list and save them to your computer.



Now open the "Salary notification" menu item and call up the relevant salary year. As a next step, upload the completed Salary notification template again in the "Salary notification list".



During the last step of the process, you have to specify whether all employees are insured with the Foundation and whether they are all fully fit for work. After the data has been checked and submitted to the Foundation, a PDF confirming your notification will be displayed, which you should keep on file as a receipt.

After your salary declaration has been processed by the Foundation, you will receive a message in your "Tasks" box.

## 4.2 Change in salaries entire workforce

Salary changes for the entire workforce can also be reported during the year.

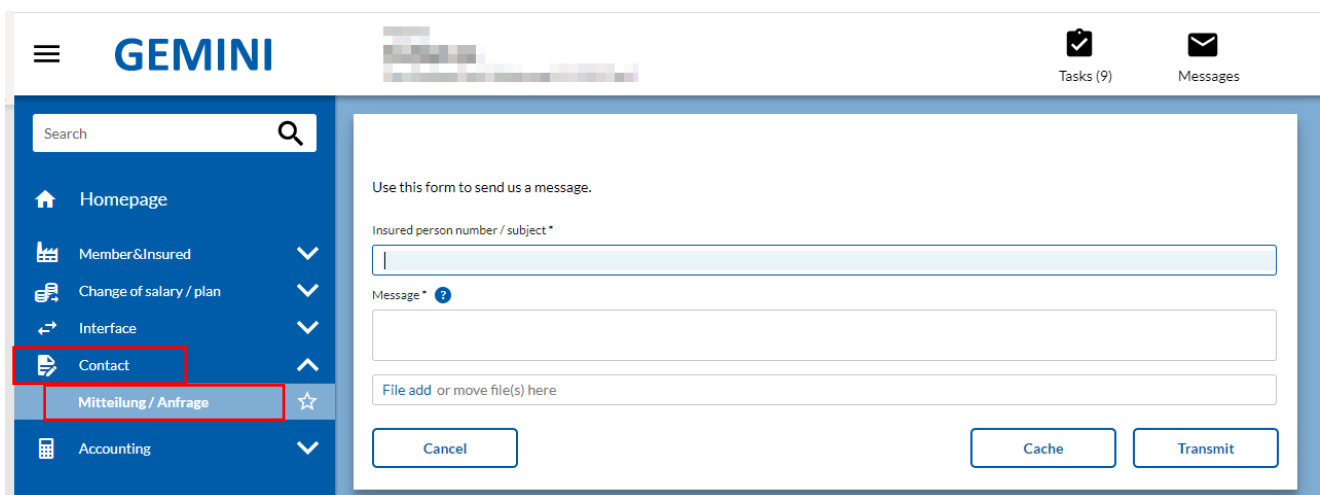
After you have entered the reference date, a list of your employees is displayed together with the salary-relevant information. You have two options to change the salaries:

1. Change the salaries directly on the portal.
2. Download the salary change template under "Template entire workforce", make the necessary changes in the list and upload it again under the "Template entire workforce" menu item.

After your salary declaration has been processed by the Foundation, you will receive a message in your "Tasks" box.

## 5 Contact

Please use this contact form for your queries and for the submission of documents to the Foundation.



The screenshot shows the GEMINI portal interface. At the top, there is a navigation bar with the GEMINI logo, a user profile picture, and icons for 'Tasks (9)' and 'Messages'. On the left, a blue sidebar contains a search bar and a menu with items: 'Homepage', 'Member&Insured', 'Change of salary / plan', 'Interface', 'Contact' (highlighted with a red box), 'Mitteilung / Anfrage', and 'Accounting'. The main content area is a contact form titled 'Use this form to send us a message.' It includes a text input field for 'Insured person number / subject \*', a larger text area for 'Message \*', and a file upload field labeled 'File add or move file(s) here'. At the bottom of the form are three buttons: 'Cancel', 'Cache', and 'Transmit'.

## 6 Accounting

### 6.1 Account statement

The account statement provides details of your invoices, credit notes and transactions. You can use the filter functions to search for specific items, display only outstanding invoices or search for transactions in a specific period.