

Fondation Patrimonia

Employer Web Portal : user manual



"Employer Web portal" user manual



"Employer Web portal" user manual

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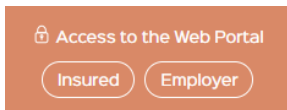


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1. Connection

<https://gestion.patrimonia.ch/auth-ag/>

Or from the Patrimonia website: www.patrimonia.ch →



1.1 Username and password

Please enter your username and password in the appropriate fields:

Login to portal WEB employer



Please log in with your access details.

User name

Password

Have you forgotten your password?
[Forgot password](#)

Not registered yet?
[Registration](#)

1.2 Unique access code by SMS, e-mail or token

After entering and validating your login and password, you will receive a message on your cell phone or e-mail, or with the Token authentication containing a unique access code. Please insert it in the field provided and validate the code.

Access code



For security reasons, we have sent an access code via SMS message to your registered mobile phone.

Please enter the code below. The code will only be valid for several minutes.

Access code



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1.3 Portal home

You are now on the home page of the web portal, where you will find a wealth of information, including: various key figures, an inbox for your mail, shortcuts for new employee announcements and salary changes, current transfers, contribution statements, and the ability to generate documents...

EN 



Search 

**Employeur SA**
Contract: Employeurs SA
Contract no.: 999
Rue Test 2
1214 Vernier

Contact person
Jérôme Michallet

Welcome to the employer dashboard
You can make, view and modify all information related to the company's employees. Edit employee personal information. Simulations. Draw up a list of theoretical contributions.

**6**
INSURED PERSON

**78'817.80**
ANNUAL CONTRIBUTION

**36'208.80**
ANNUAL INSUREE'S CONTRIBUTIONS

**42'609.00**
ANNUAL EMPLOYER'S CONTRIBUTIONS

**520'000.00**
TOTAL ANNUAL SALARIES

**520'000.00**
TOTAL INSURED SALARY

Inbox
Your in-box is currently empty.

Quick access
[➤ New admission](#) [➤ Salary / level of employment](#)

Pending changes Close 
Filter 10 25 50

Date Mutation Contract Creator
Total: 0

Contribution calculations
There are no contribution invoices at the moment.

Documents
[➤ Contributions overview](#) [➤ Contributions overview \(Excel\)](#)
[➤ Account statement](#)

Insured persons Close 
Filter 10 25 50

Name	First name	SSN	Contract	Contract no.	Plan name	
benvengien	Oxane		Employeurs SA	999	E1BK55 - Plan Plus	to insured person
Bolomey	Cédric	756.0000.0000.02	Employeurs SA	999	E1BK55 - Plan Plus	to insured person
Gomez	Françoise	756.7064.8225.19	Employeurs SA	999	E1BK54 - Plan Basis	to insured person
Lampert	Maurice	756.0000.0000.02	Employeurs SA	999	E1AB19 - Modèle de plan dynamique	to insured person
Pahud	André	756.0000.0000.02	Employeurs SA	999	E1BK54 - Plan Basis	to insured person
Veseli	Durim	756.9258.8438.12	Employeurs SA	999	E1BK54 - Plan Basis	to insured person

Total: 6 Pages 1 / 1

Completed changes 



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1.4 Password change

If you wish, you can change your password and telephone number or e-mail address for two-factor authentication. To do so, click on the "  " button in the top right-hand corner of your screen.



EN 

Search 

Personal details

Name

First name

Date of birth

SSN

Personal ID number

User ID

Prenom

Laurent

LPTES72

Change password

Never disclose your password. We will never ask for your password!

Change password >

Confirmation code (two-factor authentication)

The confirmation code is currently used via SMS:

+4179

This confirmation code is used for registration and increases the security of your data.

Change 2FA >



2. Transfer orders

Once you have entered and validated your transfer orders, they will be processed by Fondation Patrimonia staff. Processing may take up to 5 working days. In the event of a data entry error, and to avoid retroactive modifications, please contact your contact person at the number displayed on your online portal to cancel the order.

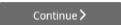
To access the various possible mutations, please click on the  button; you can then make the mutations indicated below:

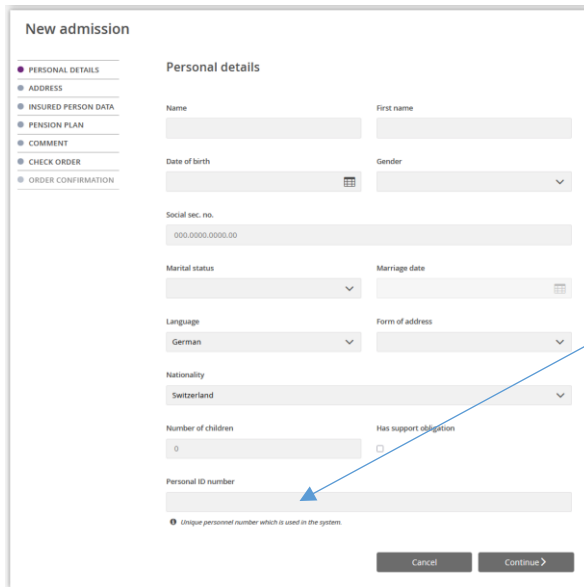
Dashboard	Messages	Simulations	Services
Home	New admission	New admission	Downloads
Completed changes	Salary / level of employment		Contact
Pending changes			General Terms and Conditions
In-box			
Documents			



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2.1 New admission

The fields below must be completed to make a new entry. After entering the information, click on  .

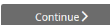


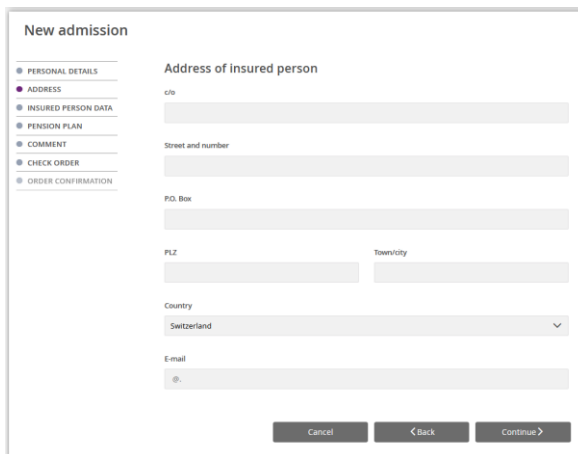
The form is titled "New admission" and has a sidebar menu with the following items: PERSONAL DETAILS (selected), ADDRESS, INSURED PERSON DATA, PENSION PLAN, COMMENT, CHECK ORDER, and ORDER CONFIRMATION. The main section is "Personal details" and contains the following fields:

- Name:
- First name:
- Date of birth:
- Gender:
- Social sec. no.:
- Marital status:
- Marriage date:
- Language:
- Form of address:
- Nationality:
- Number of children:
- Has support obligation: ☐
- Personal ID number:

Below the Personal ID number field, there is a note: "Unique personnel number which is used in the system." At the bottom right, there are two buttons: "Cancel" and "Continue >".

Optional

Complete the data then click  .



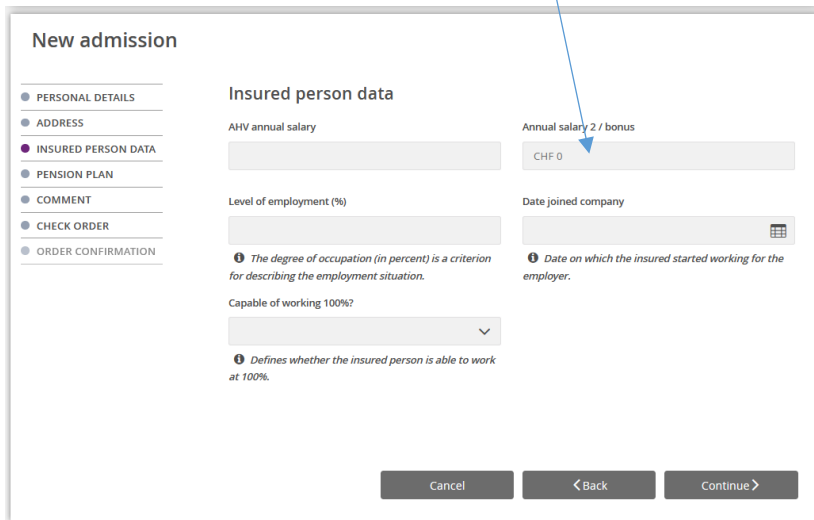
The form is titled "New admission" and has a sidebar menu with the following items: PERSONAL DETAILS, ADDRESS (selected), INSURED PERSON DATA, PENSION PLAN, COMMENT, CHECK ORDER, and ORDER CONFIRMATION. The main section is "Address of insured person" and contains the following fields:

- c/o:
- Street and number:
- P.O. Box:
- PLZ:
- Town/city:
- Country:
- E-mail:

At the bottom right, there are three buttons: "Cancel", "< Back", and "Continue >".

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Unless otherwise specified, please do not enter "annual salary 2 /bonus".



New admission

- PERSONAL DETAILS
- ADDRESS
- INSURED PERSON DATA**
- PENSION PLAN
- COMMENT
- CHECK ORDER
- ORDER CONFIRMATION

Insured person data

AHV annual salary

Annual salary 2 / bonus
CHF 0

Level of employment (%)

Date joined company

The degree of occupation (in percent) is a criterion for describing the employment situation.

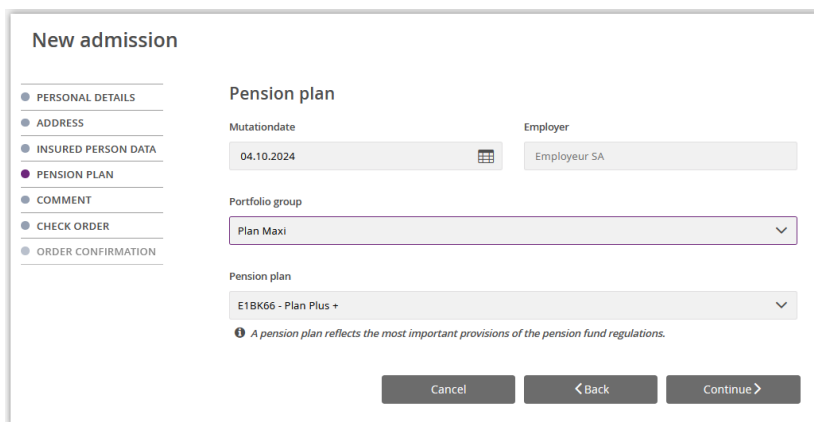
Date on which the insured started working for the employer.

Capable of working 100%?

Defines whether the insured person is able to work at 100%.

Cancel < Back Continue >

Please enter the date of enrolment, select the pension plan corresponding to the insured person, then click on **Continue >**.



New admission

- PERSONAL DETAILS
- ADDRESS
- INSURED PERSON DATA
- PENSION PLAN**
- COMMENT
- CHECK ORDER
- ORDER CONFIRMATION

Pension plan

Mutationdate
04.10.2024

Employer
Employeur SA

Portfolio group
Plan Maxi

Pension plan
E1BK66 - Plan Plus +

A pension plan reflects the most important provisions of the pension fund regulations.

Cancel < Back Continue >

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You can add a remark and/or a file to your contact person:

New admission

PERSONAL DETAILS

ADDRESS

INSURED PERSON DATA

PENSION PLAN

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Comment

Order message

Attachementes

Attach file

You can attach more than one file. The permitted formats are .PDF, .JPG, .JPEG, .PNG. The maximum file size is 5 MB.

Cancel

Back

Continue

The transfer notice summary allows you to check the transfer before sending it electronically. If necessary, you can go back by clicking on

Back

 to correct the information.

New admission

PERSONAL DETAILS

ADDRESS

INSURED PERSON DATA

PENSION PLAN

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Check order

Personal details

Name

First name

Date of birth

Gender

Mister

EXAMPLE

02.10.1972

male

Social sec. no.

Marital status

Marriage date

Language

civil union

04.10.1995

German

Form of address

Nationality

Number of children

Responsibility to provide financial support

Mr

Switzerland

4

Personal ID number

Address

c/o

Street and number

P.O. Box

PLZ

Example Street 45

1200

Town/vicity

Country

E-mail

Gemehe

Switzerland

Insured person data

AHV annual salary

Annual salary 2 / bonus

Level of employment

Date joined company

CHF 10'000.00

100%

10.10.2019

Capable of working 100%?Capable of working 100%?

Yes

Pension plan

Date joined pension plan

Employer

Portfolio group

Pension plan

04.10.2024

Employeur SA

Plan Maxi

E18956 - Plan Plus +

Comment

Order message

Attachementes

Cancel

Back

Send



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2.2 Personal data

On the home page, in the "Policyholders" section, click  for the policyholder whose personal data you wish to change.

Insured persons

Close

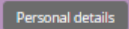
Filter

10 25 50

Name	First name	SSN	Contract	Contract no.	Plan name	
benvegner	Oxane		Employeurs SA	999	E1BK65 - Plan PLUS	to insured person +
Bolomey	Cédric	756.0000.0000.02	Employeurs SA	999	E1BK65 - Plan PLUS	to insured person +
Gomez	Françoise	756.7064.8225.19	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +
Lampert	Maurice	756.0000.0000.02	Employeurs SA	999	E1ABI9 - Modèle de plan dynamique	to insured person +
Pahud	André	756.0000.0000.02	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +
Veseli	Durim	756.9258.8438.12	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +

Total: 6

Pages < 1 / 1 >

Click on  to report changes to your personal data:

Insured persons

Close

Filter

10 25 50

Name	First name	SSN	Contract	Contract no.	Plan name	
benvegner	Oxane		Employeurs SA	999	E1BK65 - Plan PLUS	to insured person -
Departure Salary / level of employment Personal details						
Bolomey	Cédric	756.0000.0000.02	Employeurs SA	999	E1BK65 - Plan PLUS	to insured person +
Gomez	Françoise	756.7064.8225.19	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +
Lampert	Maurice	756.0000.0000.02	Employeurs SA	999	E1ABI9 - Modèle de plan dynamique	to insured person +
Pahud	André	756.0000.0000.02	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +
Veseli	Durim	756.9258.8438.12	Employeurs SA	999	E1BK64 - Plan Basis	to insured person +

Total: 6

Pages < 1 / 1 >



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You can change the marital status and add a date of marriage, for example. Click on [Continue>](#) to change your postal and e-mail addresses.

PERSONAL DETAILS

ADDRESS

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Personal details

Mutation date

03.10.2024

Name

bernegren

First name

Oxane

Date of birth

25.07.1979

Gender

feminine

Social sec. no.

000.0000.0000.00

Marital status

single

Marriage date

Language

French

Form of address

Ms

Nationality

Switzerland

Number of children

Has support obligation

☐

Personal ID number

135180

Unique personnel number which is used in the system.

Cancel

Continue>

PERSONAL DETAILS

ADDRESS

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Address of insured person

c/o

Street and number

P.O. Box

PLZ

Town/city

Country

Switzerland

E-mail

@.

Cancel

< Back

Continue >



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You can add a note to your contact person by clicking on Continue > :

Personal details

PERSONAL DETAILS

ADDRESS

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Comment

Order message

Attachments

Attach file

You can attach more than one file. The permitted formats are: PDF, JPG, JPEG, PNG. The maximum file size is 5 MB

Cancel

< Back

Continue >

Use the summary to check the information and click on Send > to send the transfer notice:

Personal details

PERSONAL DETAILS

ADDRESS

COMMENT

CHECK ORDER

ORDER CONFIRMATION

Check order

Mutation date

03.10.2024

Personal details

Name	First name	Date of birth	Gender
benveggen	Oxane	25.07.1979	feminine
Social sec. no.	Marital status	Marriage date	Language
	single		French
Form of address	Nationality	Number of children	Responsibility to provide financial support
Ms	Switzerland		
Personal ID number			
135180			
Address			
c/o	Street and number	P.O. Box	PLZ
Town/city	Country	E-mail	
Comment			
Order message			
Attachments			

Cancel

< Back

Send >



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2.3 Salary / activity rate - Mutations via Web interface

Click on the check mark indicated by the arrow to select all employees for simultaneous annual salary adjustments. Recommended for salary adjustments concerning all staff.

For individual salary changes, please select only the person concerned.

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Selection

Filter

☐

Name

First name

Date of birth

SSN

Personal ID number

☐

benveggen

Oxane

25.07.1979

135180

☐

Bolomey

Cédric

13.05.1975

756.0000.0000.02

135631

☐

Gomez

Françoise

07.02.1960

756.7064.8225.19

135345

☐

Lampert

Maurice

12.07.1978

756.0000.0000.02

137388

☐

Pahud

André

13.05.1975

756.0000.0000.02

136842

☐

Veseli

Durim

13.09.1959

756.9258.8438.12

135512

Total: 6

Pages < 1 / 1 >

Template

Import

Cancel

Continue >

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You must enter the transfer date corresponding to the date of the salary change.

You can check the salary to date and enter the new salary in the field below.

Click on [Continue >](#) as soon as you have made your salary changes.

Salary / level of employment

● SELECT

● **SALARY CHANGE**

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Salary change

Change date

09.10.2024

10 25

Name	Salary new	Salary 2 (bonus)	Level of employment
Bolomey, Cédric	CHF 100'000.00	CHF 0.00	100%
E1BK65 - Plan PLUS	CHF 100'000.00	CHF 0.00	100 %

Total: 1

Pages < 1 / 1 >

Cancel

< Back

Continue >



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2.4 Salary / activity rate - Mass transfers via Excel file

To transfer all employees via Excel file, click on **Template** and then on **All** to download the Excel file with the effective set.

Salary / level of employment

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Selection

Filter

10 25

☐	Name	First name	Date of birth	SSN	Personal ID number
☐	benvegnen	Oxane	25.07.1979		135180
☐	Bolomey	Cédric	13.05.1975	756.0000.0000.02	135631
☐	Gomez	Françoise	07.02.1960	756.7064.8225.19	135345
☐	Lampert	Maurice	12.07.1978	756.0000.0000.02	137388
☐	Pahud	André	13.05.1975	756.0000.0000.02	136842
☐	Veseli	Durim	13.09.1959	756.9258.8438.12	135512

Total: 6

Pages < 1 / 1 >

Template

Import

Cancel

Continue

Open the Excel file and enter the new salary and activity rate. Once the data has been entered, save the file on your computer.

Enregistrement automatique 7MEWMiq - Mode de compatibilité • Enregistré dans ce PC									
Fichier Accueil Insertion Mise en page Formules Données Révision Affichage Automate Aide Nuance PDF									
Calibri 11 A A									
G I S									
Police									
Alignement									
Nombre									
Styles									
O2									
H	I	J	K	L	M	N	O	P	
1	Nom	Prénom	Date de naissani	N° AVS	NSS	Salaires annoni	Taux d'activi	Nouveau salai	Nouveau taux d'activi
2	Keller	Luca	23.02.1999	53699154000	7562222222224	Fr. 39'522.00	100.00%		
3	Müller	Alexandre	10.10.1985	67185410000	7561234567811	Fr. 75'000.00	100.00%		
4	Müller	Sofia	10.04.1970	67170610000	7563333333328	Fr. 75'000.00	80.00%		
5	Schmidt	Lena	01.01.1990	82290501000		Fr. 80'000.00	100.00%		
6									
7									
8									
9									



When copying and pasting, it is important to use the same format to avoid compatibility problems.

As soon as the file is complete, click on **Import**, select the previously completed file.



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Enter the transfer date, then click Continue > to validate the salary changes.

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Salary change

Change date

09.10.2024

👁 10 25

Name	Salary new	Salary 2 (bonus)	Level of employment
Bolomey, Cédric	CHF 100'000.00	CHF 0.00	100%
E1BK65 - Plan Plus	CHF 100'000.00	CHF 0.00	100%

Total: 1

Pages < 1 / 1 >

Cancel

< Back

Continue >

You can add a remark and/or a file to your contact person.

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Comment

Order message

Attachementes

Attach file 📎

📌 You can attach more than one file. The permitted formats are: PDF, JPG, JPEG, PNG. The maximum file size is 5 MB.

Cancel

< Back

Continue >



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The transfer notice summary allows you to check the transfer before sending it electronically. If necessary, you can go back by clicking on ◀ Back to correct the information.

Salary / level of employment

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Check order

Salary / level of employment

Change date

09.10.2024

First name

Cédric

Last name

Bolomey

SSN

756.0000.0000.02

Personal ID number

135631

AHV annual salary

CHF 100'000.00

Annual salary 2 / bonus

CHF 0.00

Level of employment

100%

Total: 1

Pages < 1 / 1 >

Comment

Order message

Attachementes

Cancel

◀ Back

Send ▶

You can download the transfer confirmation for your files.

Salary / level of employment

● SELECT

● SALARY CHANGE

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

ORDER CONFIRMATION

Order has been generated successfully.

Customer

Laurent Pittet

Status

Active

Start date

04.10.2024

Download ⬇

Complete



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2.5 Output

On the home page, please select the insured person you wish to exit by clicking on

Insured persons						Close ^
Filter						10 25 50
Name	First name	SSN	Contract	Contract no.	Plan name	
benvegien	Oxane		Employeurs SA	999	E1BK65 - Plan Plus	To insured person
Bolomey	Cédric	756.0000.0000.02	Employeurs SA	999	E1BK65 - Plan Plus	To insured person
Gomez	Françoise	756.7064.8225.19	Employeurs SA	999	E1BK64 - Plan Basis	To insured person
Lampert	Maurice	756.0000.0000.02	Employeurs SA	999	E1AB19 - Modèle de plan dynamique	To insured person
Pahud	André	756.0000.0000.02	Employeurs SA	999	E1BK64 - Plan Basis	To insured person
Vesell	Durim	756.9258.8438.12	Employeurs SA	999	E1BK64 - Plan Basis	To insured person
Total: 6						Pages < 1 / 1 >

On the insured person's page, please click on "Exit".

Insured person

Name	benvegien	Employer contribution	CHF 7785.00
First name	Oxane	Employee contribution	CHF 7785.00
Contract no.	999	Entry	01.01.2024
SSN		Portfolio group	Plan Standard
Marital status	single	Plans	E1BK65 - Plan Plus
Address		Employer	> Employeur SA

 7785.00 ANNUAL INSUREE'S CONTRIBUTIONS	 7785.00 ANNUAL EMPLOYER'S CONTRIBUTIONS	 648.75 MONTHLY INSUREE'S CONTRIBUTIONS
 648.75 MONTHLY EMPLOYER'S CONTRIBUTIONS	 100'000.00 ANNUAL SALARY	 100'000.00 INSURED SALARY

Inbox

Your in-box is currently empty.

Quick access

> New admission	> Personal details
> Salary / level of employment	> Departure

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Postal details are essential when an employee leaves the company, as they enable the Foundation to send the employee's departure statement. If applicable, please also provide us with the outgoing employee's private e-mail address.

Departure

● GENERAL

● ADDRESS

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

Address of insured person

c/o

Street and number

P.O. Box

PLZ

Town/city

Country

Switzerland

E-mail

Cancel

Back

Continue

Complete the following fields: date of discharge, reason for discharge, and indicate whether the person is at full capacity, then click on

Continue

 .

Departure

● GENERAL

● ADDRESS

● COMMENT

● CHECK ORDER

● ORDER CONFIRMATION

General

Departure as of

03.10.2024

Reason for leaving

Capable of working 100%

Yes

Defines whether the insured person is able to work at 100%.

Cancel

Continue



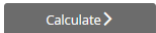
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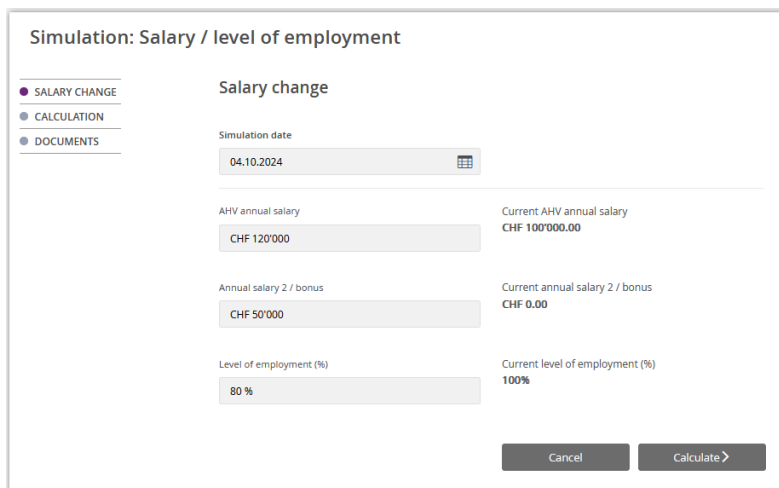
3. Simulation

3.1 Salary/activity rate simulation

To run salary simulations for an existing insured person, click on the  button; then on salary/activity rate:



Please enter the simulation date, annual salary and activity rate for your calculation simulation, then click on  .



The form is titled 'Simulation: Salary / level of employment'. It has three tabs: 'SALARY CHANGE' (selected), 'CALCULATION', and 'DOCUMENTS'. The form contains the following fields:

- Simulation date:** 04.10.2024
- AHV annual salary:** CHF 120'000
- Current AHV annual salary:** CHF 100'000.00
- Annual salary 2 / bonus:** CHF 50'000
- Current annual salary 2 / bonus:** CHF 0.00
- Level of employment (%):** 80 %
- Current level of employment (%):** 100%

At the bottom right, there are two buttons: 'Cancel' and 'Calculate >'.

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In this window, you will find the comparison of contributions with the salary simulation and you will be able to download a document in PDF format by clicking on [Documents](#) then on .

SALARY CHANGE

CALCULATION

DOCUMENTS

Simulation: Salary / level of employment

Calculation

Simulation date
04.10.2024

Module	Without simulation	With simulation
Plan	E1BK65 - Plan Plus	E1BK65 - Plan Plus
Category	Plan Standard	Plan Standard
Age LOB	45	45
Activity rate	100%	80%
Announce salary	CHF 100'000.00	CHF 120'000.00
Insured salary	CHF 100'000.00	CHF 120'000.00
Monthly inseree's savings contribution	CHF 600.00	CHF 720.00
Monthly employer's savings contribution	CHF 600.00	CHF 720.00
Monthly inseree's risks contribution	CHF 40.40	CHF 48.50
Monthly employer's risk contribution	CHF 40.40	CHF 48.50
Total monthly inseree's contribution	CHF 648.75	CHF 776.85
Total monthly employer's contribution	CHF 648.75	CHF 776.85

< Back

Complete

Documents >

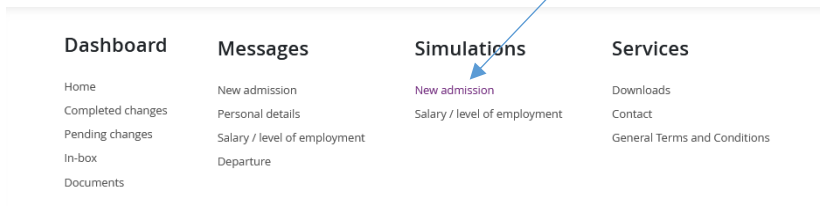


"Employer Web portal" user manual

3.2 Input simulation

This simulation will enable you to calculate and project the costs and benefits of a future employee.

To run entry simulations, click on the  button, then on "New policyholder entry".



Please enter all the information required to create the simulation.
Confirm by clicking on Next at the bottom right of the page.

Simulation: New admission

- PERSONAL DETAILS
- INSURED PERSON DATA
- PENSION PLAN
- CALCULATION
- DOCUMENTS

Personal details

Name

First name

Date of birth

Gender

Social sec. no.

Marital status

Marriage date

Language

Form of address

Nationality

Number of children

Has support obligation

Cancel

Continue >

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Please state annual salary, degree of employment and, if available, vested benefits.

Please enter your "future employee's" date of enrolment, category and pension plan by clicking on Suivant > at the bottom right of the page.

Simulation: New admission

PERSONAL DETAILS

INSURED PERSON DATA

PENSION PLAN

CALCULATION

DOCUMENTS

Insured person data

Annual salary

CHF 125'000

Annual salary 2 / bonus

CHF 10'000

Level of employment (%)

100 %

Date joined company

03.10.2023

Vested benefit

CHF 15'000

Vested benefit (BVG)

CHF 12'000

The degree of occupation (in percent) is a criterion for describing the employment situation.

Vested benefits are the assets that each insured person accumulates with his or her pension fund. The vested termination benefits must be transferred to the new pension fund as an entry benefit.

Date on which the insured started working for the employer.

Vested benefits are the assets that each insured person accumulates with his or her pension fund. The vested termination benefits must be transferred to the new pension fund as an entry benefit.

Cancel

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Continue >

On this page you will find a summary of the simulation, including the contributions, and you will be able to download a document in PDF format by clicking on , then on Documents > .

Simulation: New admission

PERSONAL DETAILS

INSURED PERSON DATA

PENSION PLAN

CALCULATION

DOCUMENTS

Calculation

Simulation date

04.10.2024

Module	With simulation
Plan	E1BK66 - Plan Plus +
Category	Plan Maxi
Age LOB	30
Activity rate	100%
Announce salary	CHF 125'000.00
Insured salary	CHF 125'000.00
Monthly insurée's savings contribution	CHF 572.90
Monthly employer's savings contribution	CHF 572.90
Monthly insurée's risks contribution	CHF 64.05
Monthly employer's risk contribution	CHF 64.05
Total monthly insurée's contribution	CHF 645.30
Total monthly employer's contribution	CHF 645.30

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4. Documents

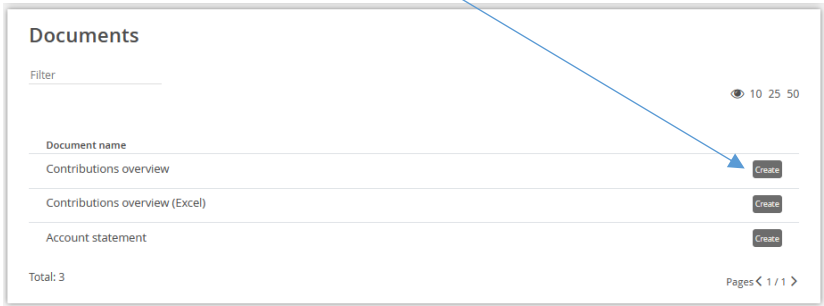
To access the documents, click on the  button, then on "Documents".



4.1 Theoretical contributions

For contributions, you can generate the list in Excel or PDF format "Theoretical contributions" by clicking on .

This feature allows you to obtain details of contributions per employee, for your entire company.



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To download the list of theoretical contributions for your entire workforce, please enter a reference date, then click on the following link [Create](#) .

Documents

Contributions overview (Excel)
WEB-AKT10a Cotisations théoriques (EXCEL)

Key date

Contract Contract Number

999

Physical person Name First name

Create



Click on the arrow to download the document  .

Documents

Designation

WEB-AKT10a Cotisations théoriques (EXCEL)

Complete

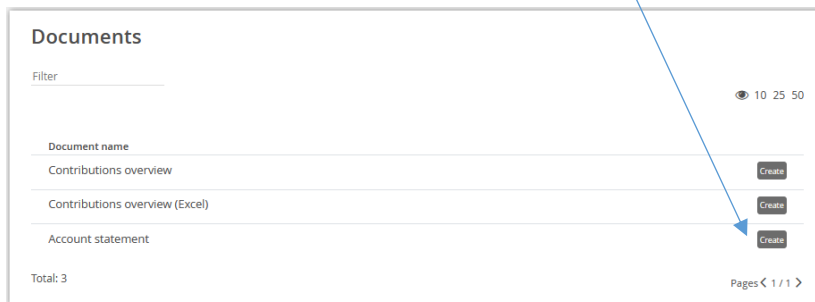


"Employer Web portal" user manual

4.2 Account statement

You can generate a statement of your account by clicking on **Create** .

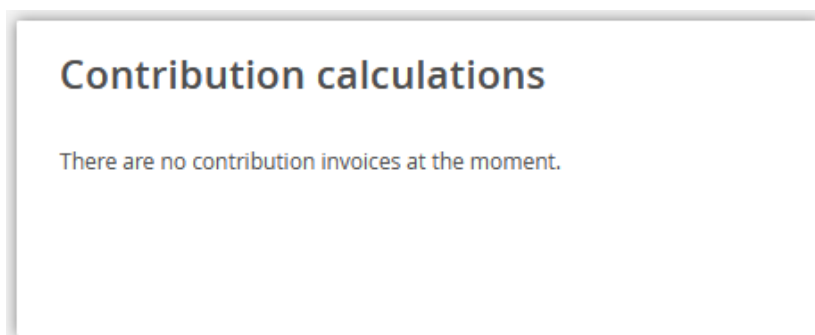
This feature allows you to download the account statement up to the previous day's value date.



4.3 Statement of contributions

On the  home page, you'll find contribution statements in the dedicated section bearing the same name.

You can view the invoice and contribution statements, or download the documents using the  .



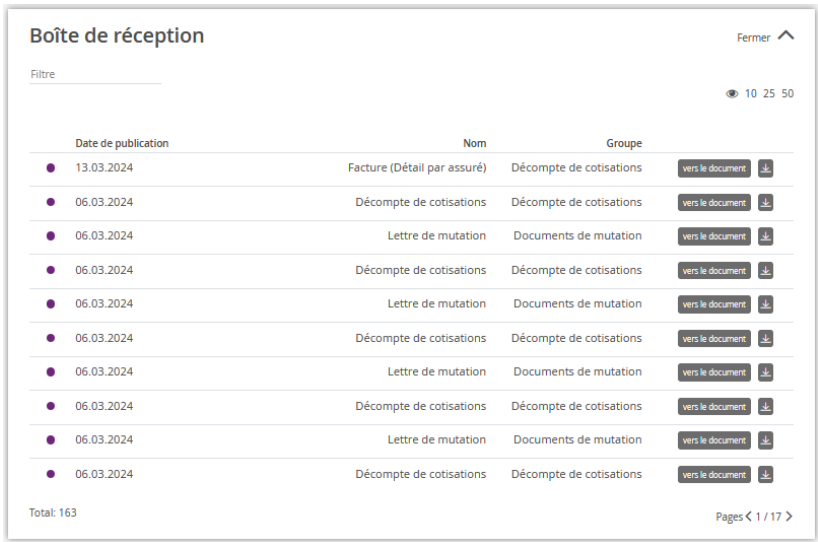
"Employer Web portal" user manual

4.4 Inbox

To access the inbox, click on the  button, then on "Inbox".



With this feature, you can view all correspondence relating to your current transfers, invoices, contribution statements, contracts, settlements and much more. You can also download documents using the  .

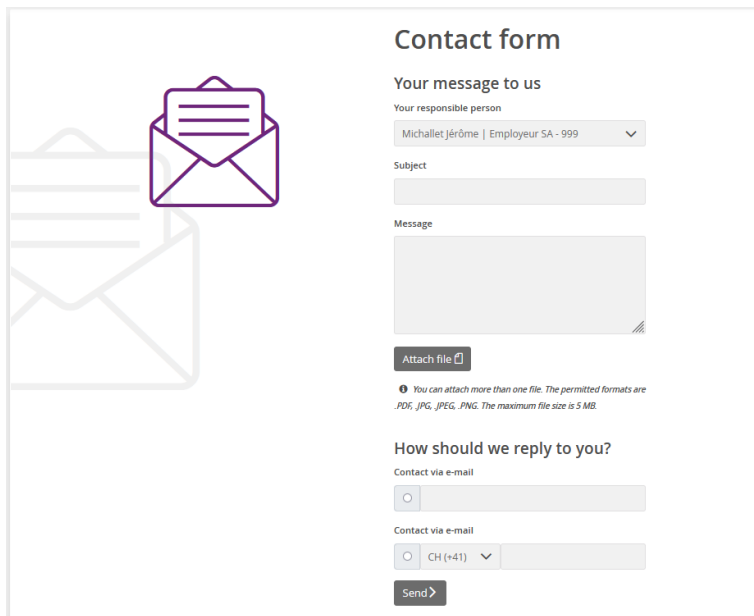


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5. Service

5.1 Contact form

You can contact us using this secure tool by sending us messages and attachments using the  button; then click on "Contact".



The contact form is displayed within a light gray border. On the left side, there is a large, faint background illustration of an open envelope with a purple outline. Overlaid on this is a smaller, solid purple icon of a closed envelope with a document inside. The form itself is titled "Contact form" in a bold, dark gray font. Below the title, the section "Your message to us" contains a dropdown menu for "Your responsible person" with the selected value "Michallet Jérôme | Employeur SA - 999". Below this is a text input field for the "Subject". The "Message" section features a large text area with a small diagonal line icon in the bottom right corner. An "Attach file" button with a paperclip icon is positioned below the message area. A small informational note follows: "You can attach more than one file. The permitted formats are .PDF, .JPG, .JPEG, .PNG. The maximum file size is 5 MB." The next section, "How should we reply to you?", includes a radio button and a text input field for "Contact via e-mail". Below this, another radio button is followed by a dropdown menu showing "CH (+41)" and a text input field. At the bottom of the form is a "Send" button with a right-pointing arrow.

Contact form

Your message to us

Your responsible person
Michallet Jérôme | Employeur SA - 999

Subject

Message

Attach file

You can attach more than one file. The permitted formats are .PDF, .JPG, .JPEG, .PNG. The maximum file size is 5 MB.

How should we reply to you?

Contact via e-mail

Contact via e-mail

CH (+41)

Send

"Employer Web portal" user manual

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