

TISA

Transfers Database User Guide
November 2026

Transfer Database Content

1. Introduction & Information Stored
2. First time logon
3. Accessing the transfers database
4. Using the transfers database
5. Company Admin



TISA

Introduction & Information stored

Transfer Database Content

Introduction & Information stored

The Transfers Database, hosted by TISA is a **free self-service database** provided to the industry, used by ISA managers and the wider industry to provide identification of transfer contacts and is a secure area to store transfer contact information.

Key contacts are available in the database and to access these firms must first register here: TISA Transfers . You do not need to be a TISA member to access the database.

*For support, please see Support & Disclaimer

What information is stored on the transfers database?

A list of ISA managers, validated using the HMRC list of authorised ISA managers, is maintained and companies are invited to provide day to day and escalation contact details, along with other information relevant to transfers such as:

- Postal address for transfers
- Opening hours
- Residual income payment details
- APS information.

The database also contains SUN details for those providers participating in the Pay.UK Cash ISA transfers initiative. Cash ISA Transfer Service - Pay.UK (wearepay.uk)



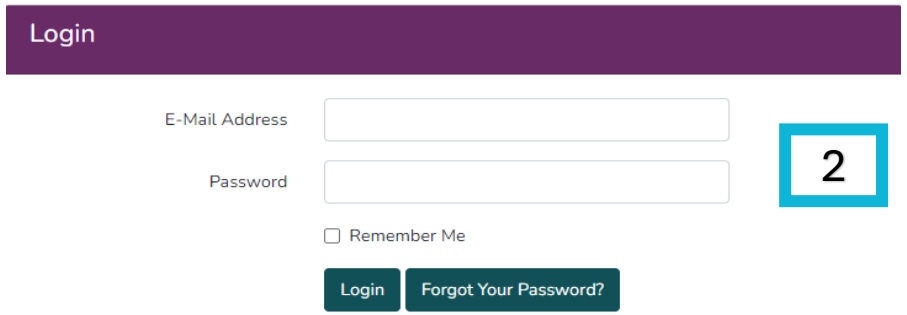
TISA

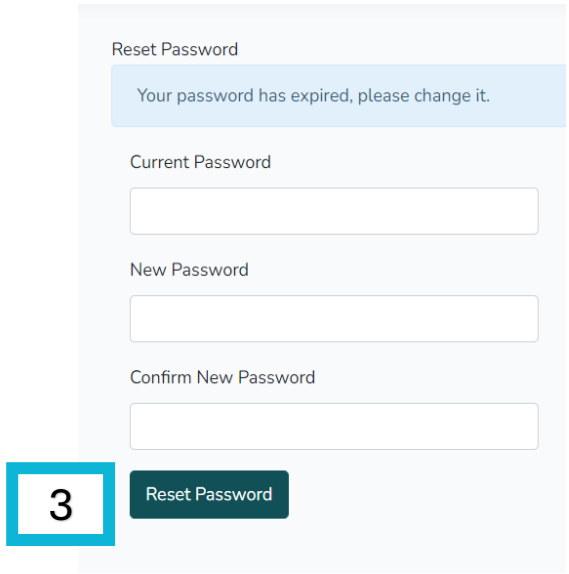
Logging In

Transfer Database Content

First time logon







1. New users added to the Transfers Database receive an email to confirm their access and to provide an initial password (please note this may go into Spam or Junk).
2. When logging on for the first time, users will be prompted to reset their password. Enter your email address and initial password (note that both are case sensitive), select **LOGIN.**
3. Enter your initial password and then enter and confirm your new password and select **Reset Password.**



TISA

Accessing the Transfers Database

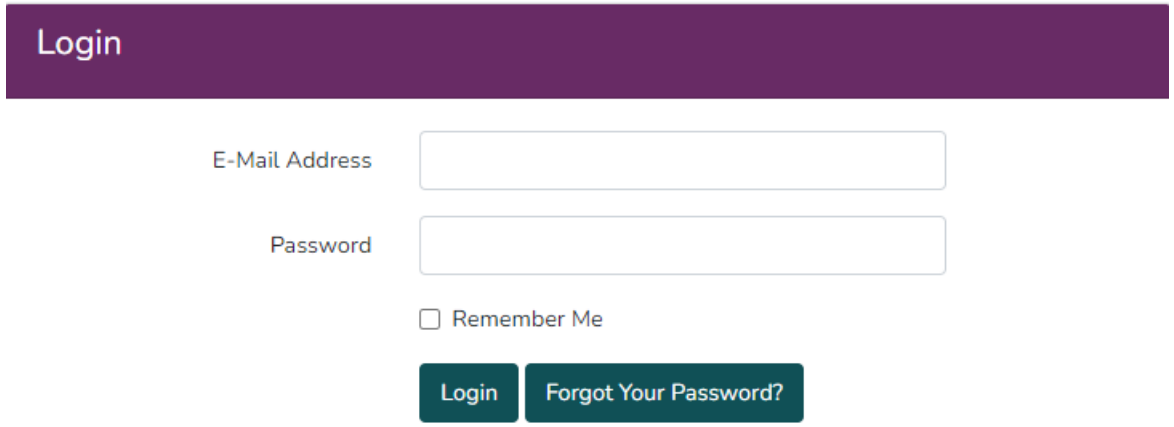
Transfer Database Content

Accessing the Database

The Transfers Database can be accessed from the TISA website under FREE SERVICES or through this link: https://www.tisa.uk.com/isatransfers-database/ and clicking into

LOGON TO THE TRANSFERS DATABASE →

1. Enter your email address and password (note both are case sensitive) and select **LOGIN.**



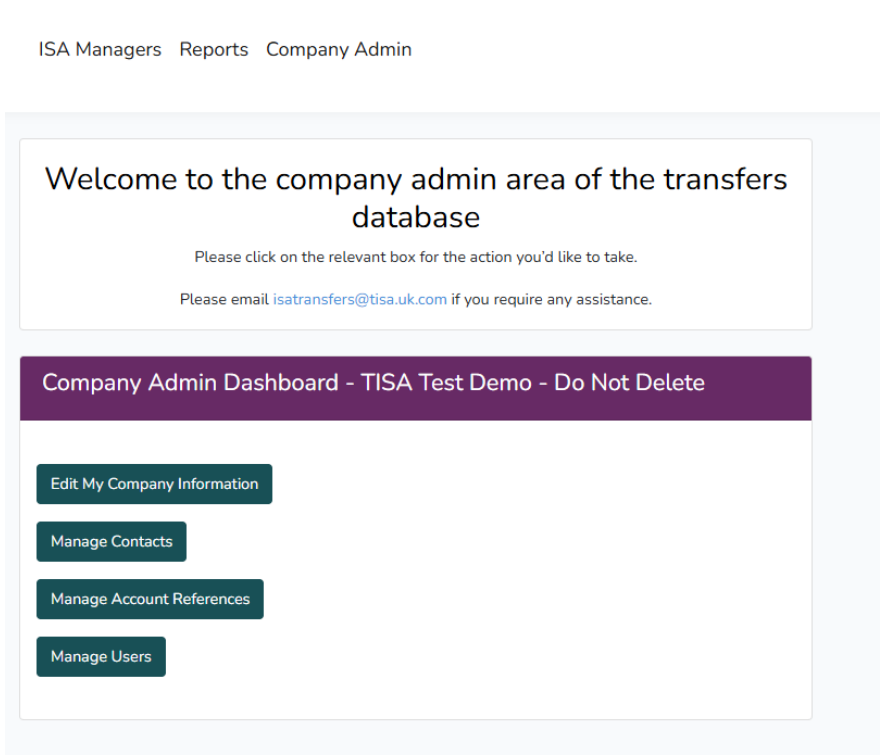


TISA

Using the Transfers Database

Transfer Database Content

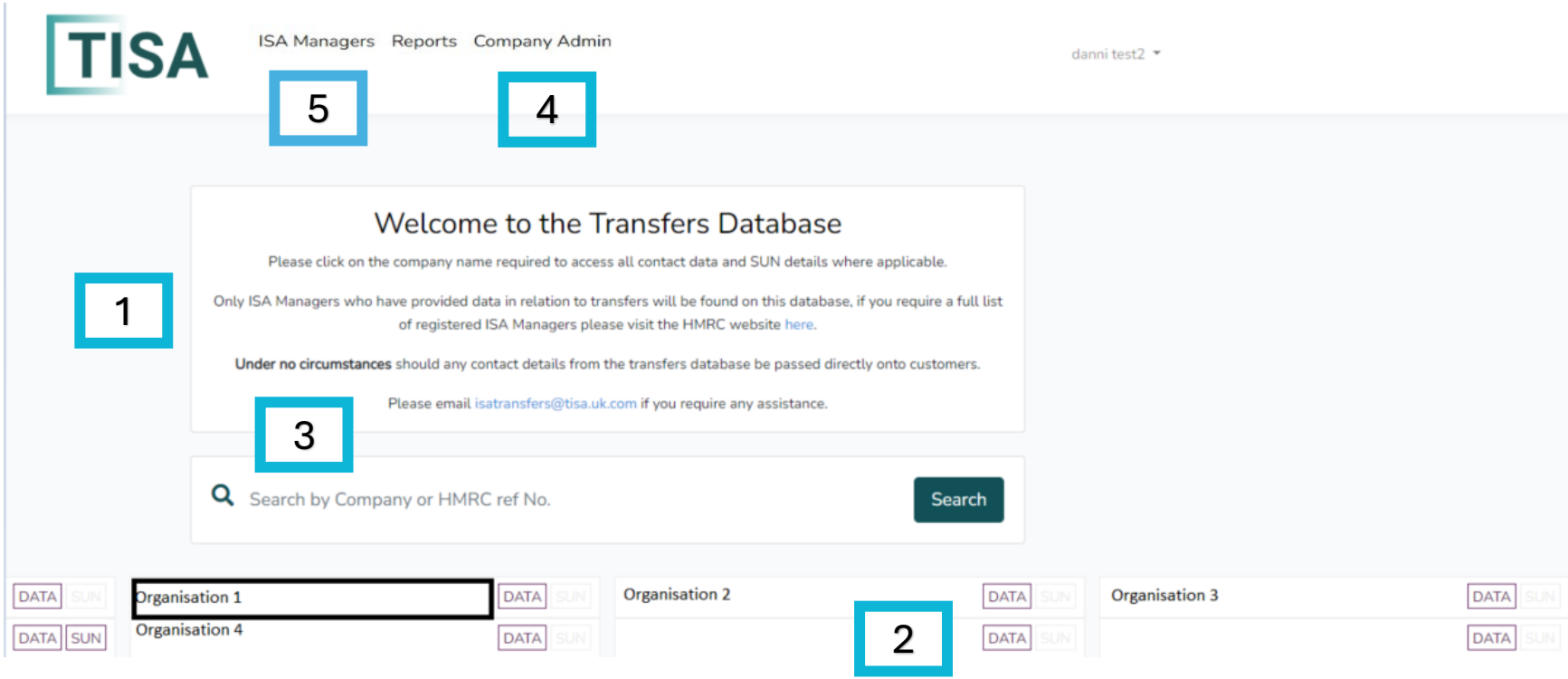
Using the Transfers Database



1. The next screen displayed depends on your individual access level. Database users will be presented with all Transfers Database information**.**
2. Database managers will be presented with a choice of ISA managers or Company Admin. To access the Transfers Database, select **ISA MANAGERS.**

TISA

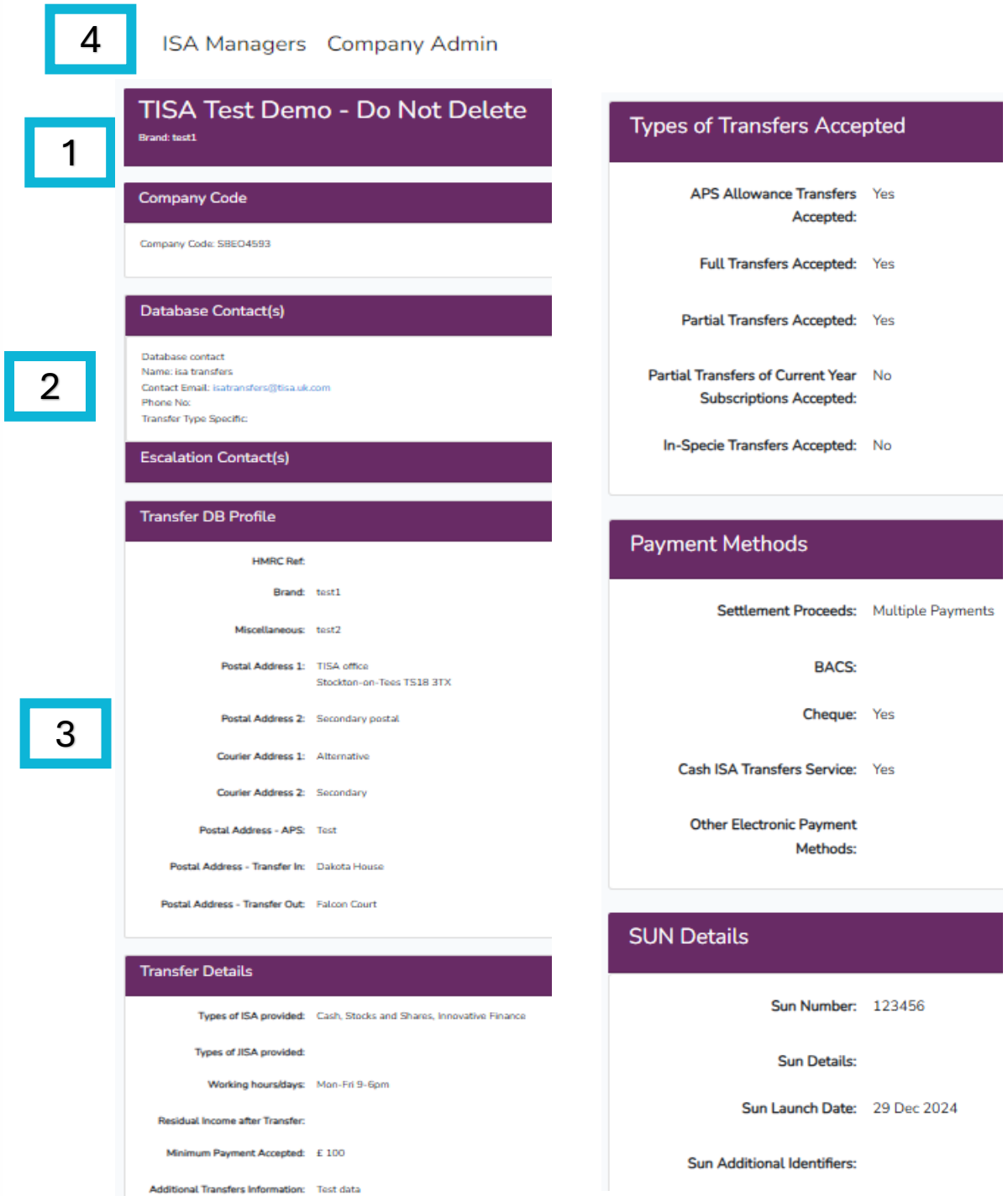
Using the Transfers Database



1. Search any company in the database using their name or HMRC reference number and click **Search**.
2. Companies matching your search results are displayed. Those with live **SUN** details are indicated by the **SUN** flag.
3. To view company data, select the relevant company name from the alphabetical list.
4. You can only view this tab if you are an admin, where you can manage your company data and contacts/users.
5. For the full **ISA manager** company list, click here to return to this page at any time.

TISA

Using the Transfers Database



1. All data and contact details provided for the company will be displayed.

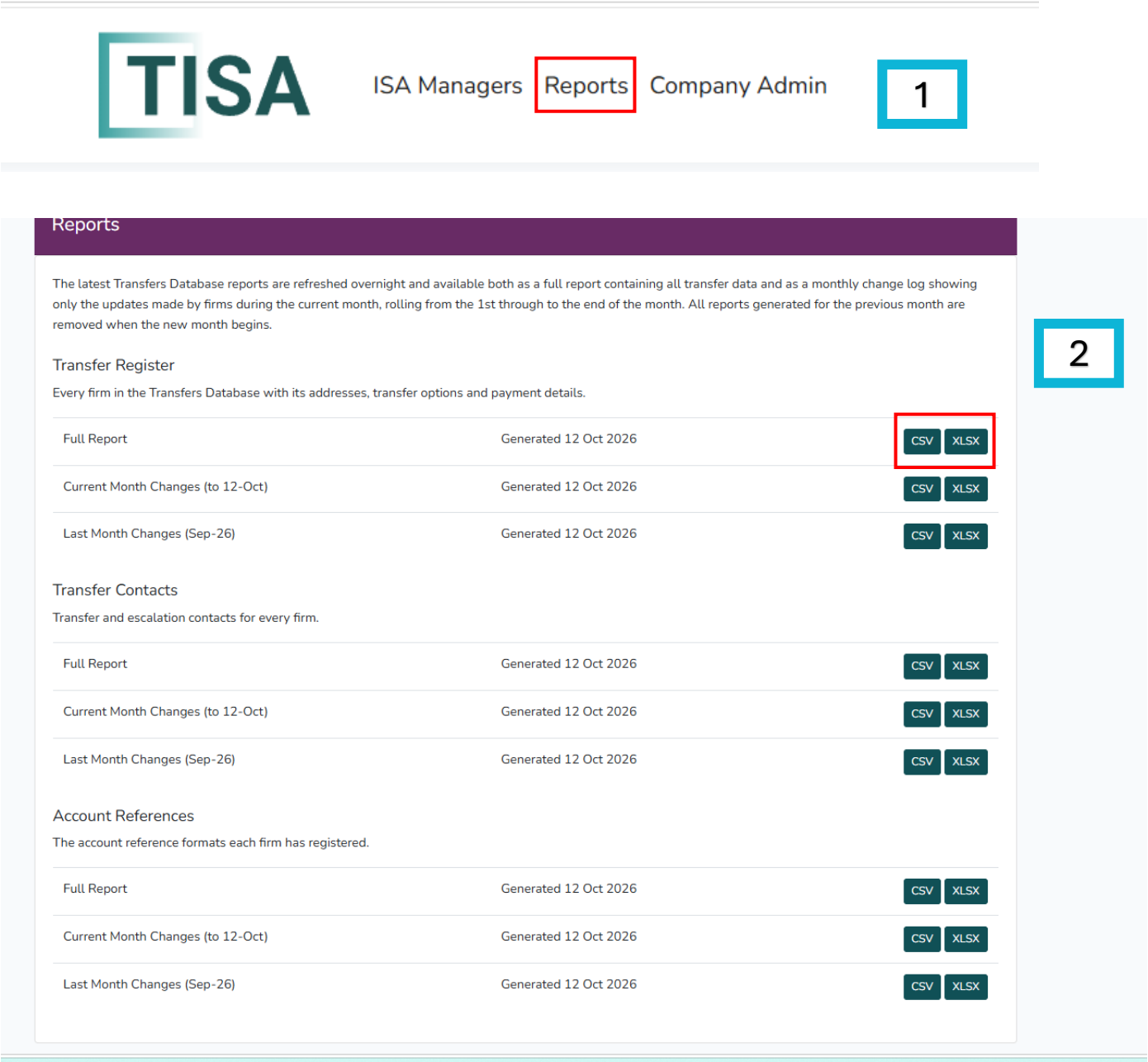
2. Scroll to view information along with the Transfers Database **contact details**, **company code** and any **SUN** (Service User Number) details.

3. For reference, please see the Transfers Database data dictionary on our Website.

4. To return to the Transfers Database select **ISA MANAGERS** (please note there is no back button).

TISA

Using the Transfers Database



1. Select **Reports** from the top navigation menu to access the available reports.
2. Locate the relevant report category: Transfer Register, Transfer Contacts or Account References.
3. Choose the required report type: **Full Report**, **Current Month Changes** or **Last Month Changes**.
4. Check the generated date to ensure you have the correct report
5. Click **CSV** or **XLSX** next to the selected report to download it in your preferred format.
6. Reports are **refreshed once per day** (overnight post 6pm).
7. All reports generated for the 'Last Month' will be superseded on the 1st of the following month. We do not retain historic reporting once past.

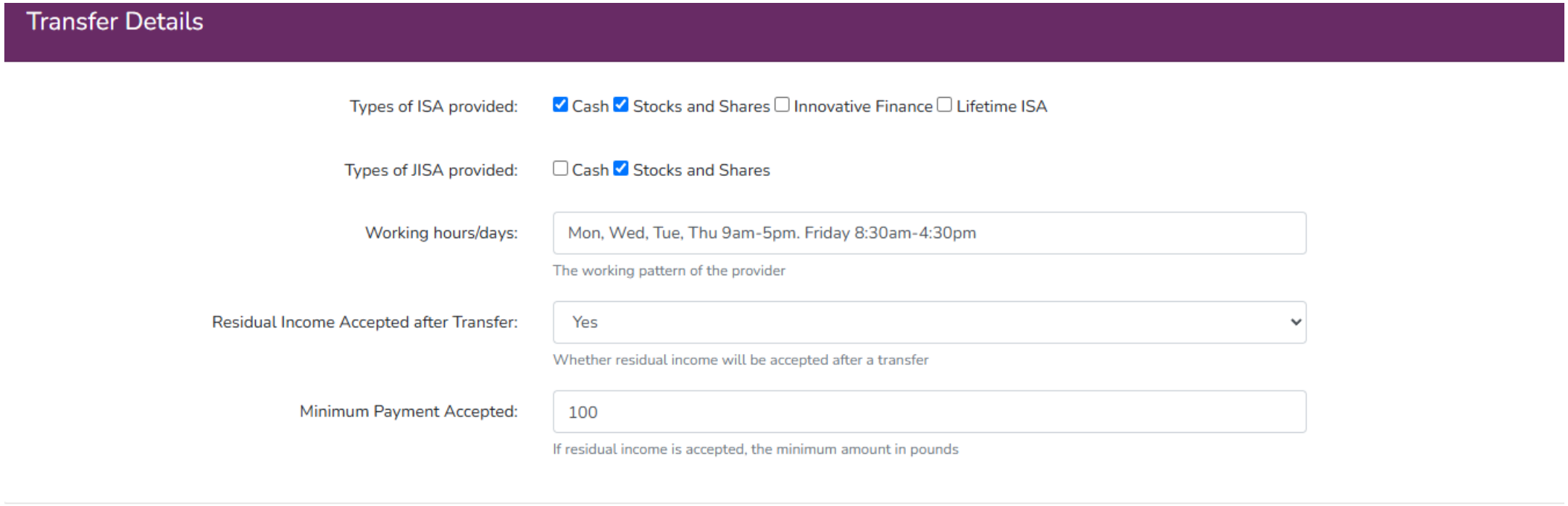


TISA

Company Admin

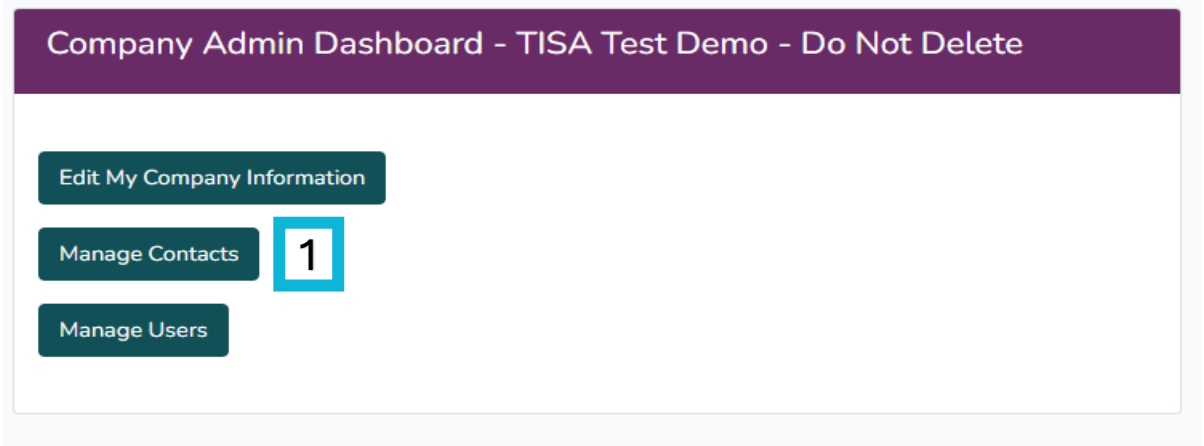
Transfer Database Content

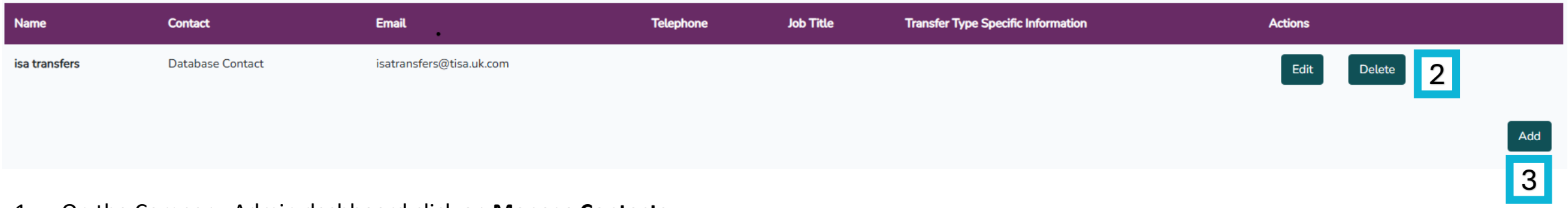
Edit my company information



1. Database managers will be presented with a choice of **ISA Managers** or **Company Admin**, to access the admins in the database, select **COMPANY ADMIN.**
2. To edit and update the company details, click **Edit My Company Information**.
3. Once all the information is entered, click **Update Details**.

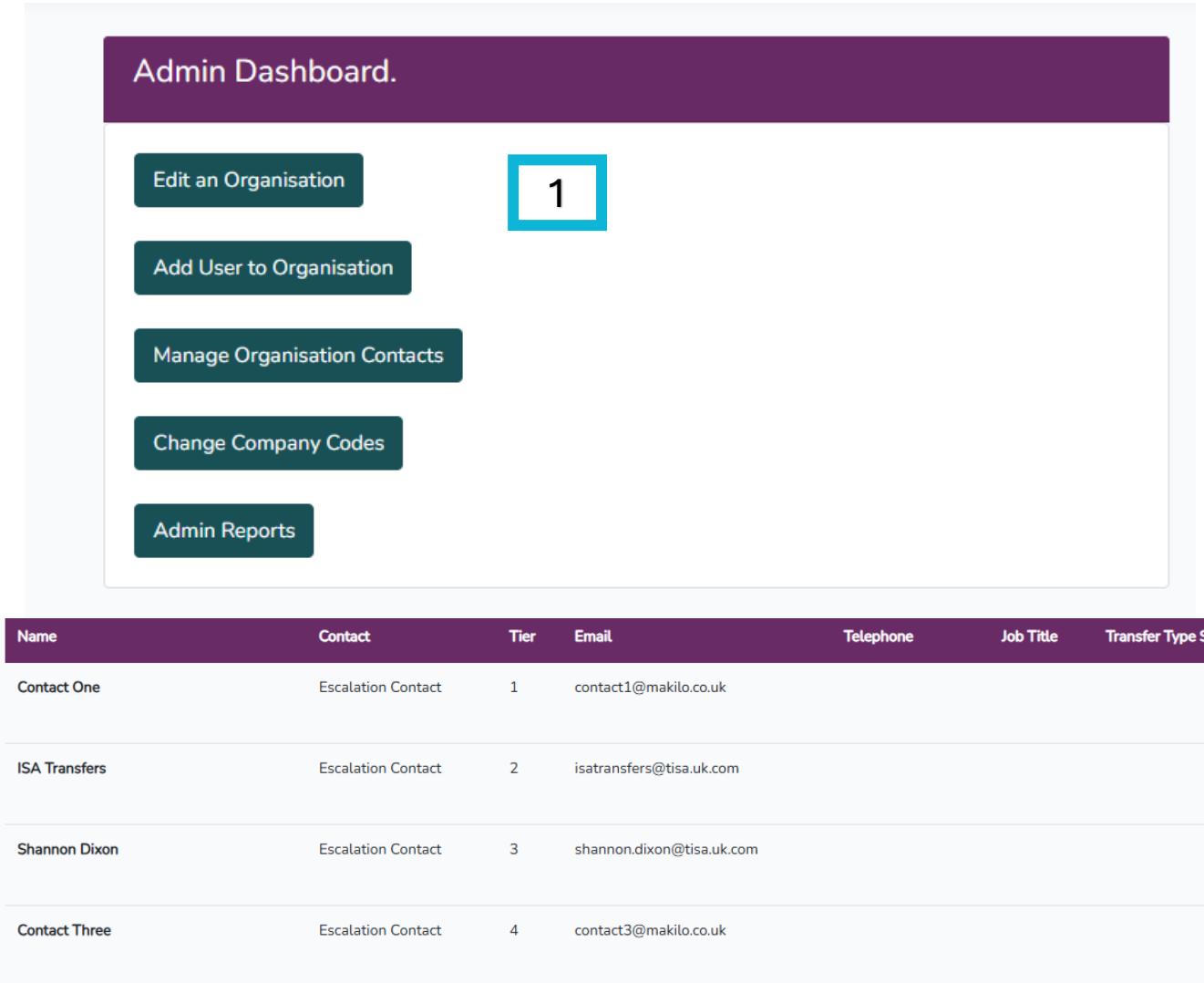
Manage Contacts





1. On the Company Admin dashboard click on **Manage Contacts.**
2. The admin user within the edit functionality can only edit names and telephone numbers. If you wish to amend a person's email address, you must delete the contact and newly create them.
3. You can **add** new contacts for the company.

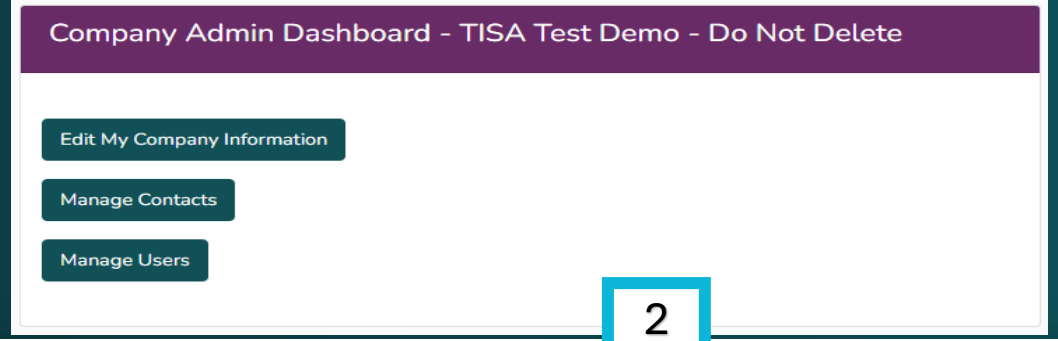
Escalation Contacts



Name	Contact	Tier	Email	Telephone	Job Title	Transfer Type Specific Information	Comments	Actions
Contact One	Escalation Contact	1	contact1@makilo.co.uk				Contact One comment	Edit Delete
ISA Transfers	Escalation Contact	2	isatransfers@tisa.uk.com			2		Edit Delete
Shannon Dixon	Escalation Contact	3	shannon.dixon@tisa.uk.com					Edit Delete
Contact Three	Escalation Contact	4	contact3@makilo.co.uk					Edit Delete

1. On the Company Admin dashboard, select **Manage Organisation Contacts**.
2. This allows admins to add escalation and database contacts for their organisation.
3. Organisations can establish an escalation process to help manage and prioritise contacts.
4. Multiple escalation tiers can be set up to identify who should be contacted and in what order of priority, with Tier 1 being the first point of contact.

Manage Users



1

2

Name	Email	Job Title	Admin & Viewer	Viewer	Notifications	Actions
Danielle Barrass		Head of Ops	✓	x	✓	Edit Permissions Delete
Gordon Shea		IT Systems Manager	✓	x	✓	Edit Permissions Delete
Patrick Test		NA	✓	x	✓	Edit Permissions Delete
TISA TDB			✓	x	x	Edit Permissions Delete
Tom Barrington		Developer	✓	x	✓	Edit Permissions Delete

3

Add A New User to Company

4

1. On the Company Admin dashboard click **Manage Users**.
2. This shows which contacts have **admin, viewer and notification** permissions.
3. The admin user can **edit** existing permissions and **delete** users.
4. **New users** can be added here.

Support & Disclaimer

- The Transfers Database is not a managed service. Where possible, TISA will support participating companies in accessing key contacts; however, this is limited to the information currently held.
    - **TISA does not mediate disputes between firms regarding transfer requests. Additionally, TISA will not pursue individual firms over non-communications related to transfer requests.**
    - We also recommend the use of the following:
    - **ISA/GIA/Pension Electronic Transfers: TeX** offer managed Service Levels between all parties, please contact tex@tisaexchange.co.uk
    - **Pay.UK** also operate a managed contact database for predominantly Cash ISA transfer queries please contact CISA@wearepay.uk
- If you are a TISA member and experience ongoing issues and have exhausted all other avenues of communication, then please raise this as a formal request under your membership and where possible we may be able to assist.
- Please note the accuracy and validity of data shown on the database **is the absolute responsibility of participating companies.**
- If you experience errors or issues in performance or functionality of the database, please contact isatransfers@tisa.uk.com
- **Under no circumstances** should any database contact details be passed directly onto customers.
- Thank you.



TISA

For any queries, please reach out to isatransfers@tisa.uk.com

tisa.uk.com

@uktisa

TISA UK

Code: PR08
Version 1.2
Reviewer: DB