Employer Portal Manual

Index **Page**

1. Activating an account

To sign up for the employer portal you need to be added to either the main contact registration form, authorised employer user list or authorised payroll user list. The form then needs to be signed by someone who is a current registered authorised signatory.

All forms are available in the employers zone on our website at www.wypf.org.uk under managing your contacts.

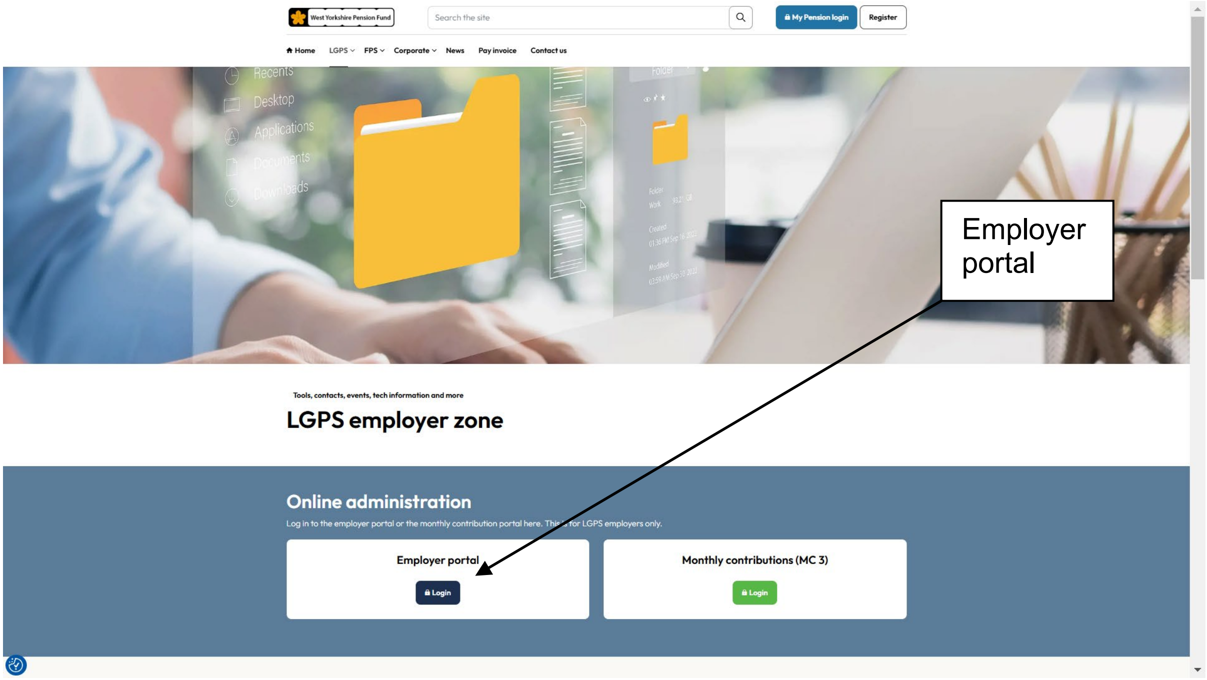
All new users need to complete a secure administration user agreement form. This requires each user to agree to the terms and conditions by signing and dating the form.

Scan and e-mail the completed forms to wypf.pfr@wypf.org.uk or alternatively send through the post for the attention of Employer Relations Team, WYPF, PO Box 67, Bradford, BD1 1UP.

A separate login will be requested for each user.

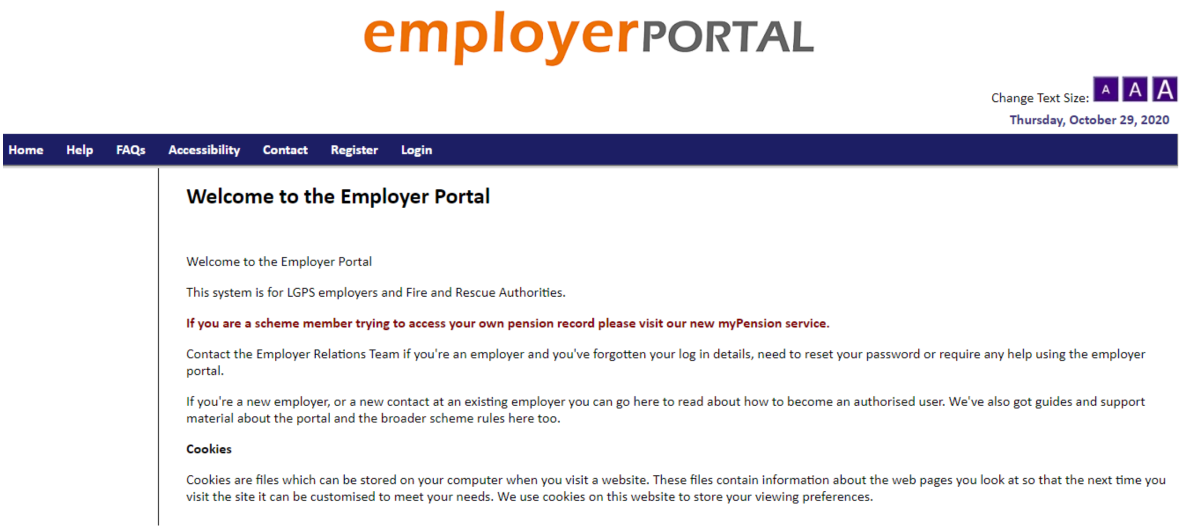
2. Accessing the employer portal

To access the employer portal, go to the LGPS employer zone and select Employer portal login from the online administration menu. See below



3. Employer portal home page

The first screen you will see is this.



There are a number of functions that you can access from the homepage:

4. Contact details

Help –Clicking on help will direct you to the correct contact details for the web portal you are using, as we are using the employer portal you can contact your Pension Fund Representative in the first instance.

FAQs – This contains answers to frequently asked questions for **members** signing up for '*My Pension*'.

Accessibility – You can change the size of the font by using the purple A buttons.

Contact – Gives details of how to contact the pension fund using e-mail, telephone, fax, postal address or by visiting either office in Bradford or Lincolnshire.

5. Logging on & passwords

On receipt of an authorised contact form, we will create a new user account using:

- Full name
- E-mail address
- List of permissions

Permissions refer to the members records you are able to see; therefore, if you administer the pension for more than one of our employers you will need to be named on their main contact registration form or authorised user lists in order for you to have access to their member records.

Once your account has been created you will receive an e-mail with your account details asking you to call to get your initial password to access the system.

When you call you will need to confirm the following security details:

- Full name
- Username

You will then be given your temporary password to login to the employer portal.

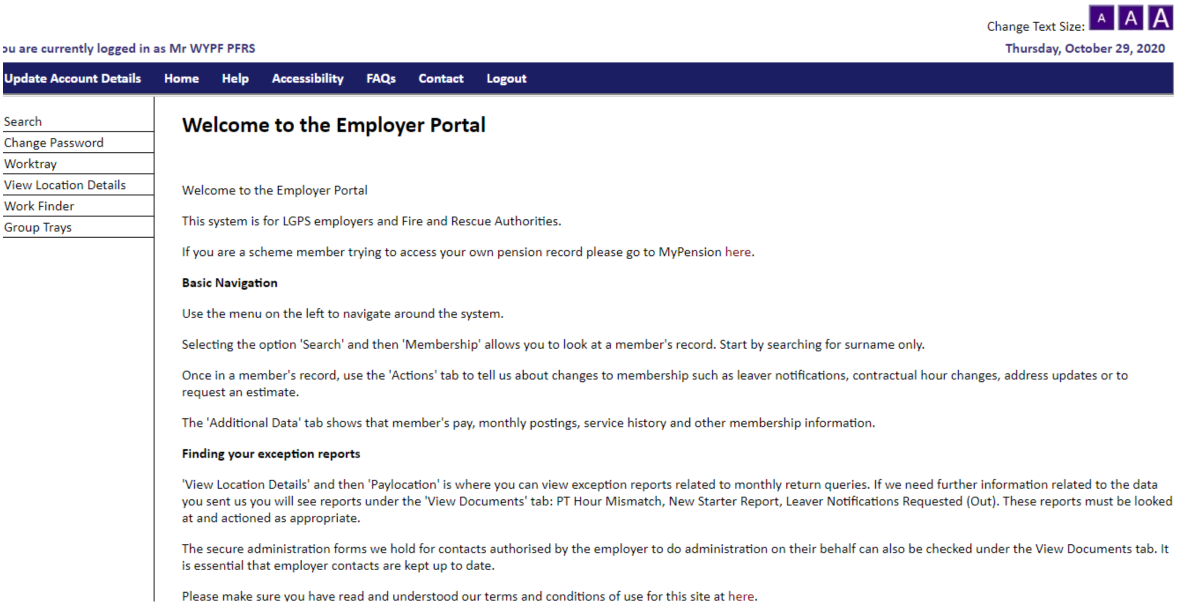
Your username is generally your surname & first initial, for example John Smith will have a username of SMITHJ. Usernames will always appear in capital letters; however, it is only your password which is case sensitive.

6. Login page & password reset

You can now enter your new login details by clicking on the Login button.
If you forget your password, you need to call 01274 434900 and ask for it to be reset.
Once you are logged on to the employer portal you will be able to search your members' data, update records with hour changes and absences, and request information from the pension fund.

7. The portal

employerPORTAL



Change Text Size: A A A

ou are currently logged in as Mr WYPF PFRS

Thursday, October 29, 2020

Update Account Details | Home | Help | Accessibility | FAQs | Contact | Logout

Search
Change Password
Worktray
View Location Details
Work Finder
Group Trays

Welcome to the Employer Portal

Welcome to the Employer Portal

This system is for LGPS employers and Fire and Rescue Authorities.

If you are a scheme member trying to access your own pension record please go to MyPension here.

Basic Navigation

Use the menu on the left to navigate around the system.

Selecting the option 'Search' and then 'Membership' allows you to look at a member's record. Start by searching for surname only.

Once in a member's record, use the 'Actions' tab to tell us about changes to membership such as leaver notifications, contractual hour changes, address updates or to request an estimate.

The 'Additional Data' tab shows that member's pay, monthly postings, service history and other membership information.

Finding your exception reports

'View Location Details' and then 'Paylocation' is where you can view exception reports related to monthly return queries. If we need further information related to the data you sent us you will see reports under the 'View Documents' tab: PT Hour Mismatch, New Starter Report, Leaver Notifications Requested (Out). These reports must be looked at and actioned as appropriate.

The secure administration forms we hold for contacts authorised by the employer to do administration on their behalf can also be checked under the View Documents tab. It is essential that employer contacts are kept up to date.

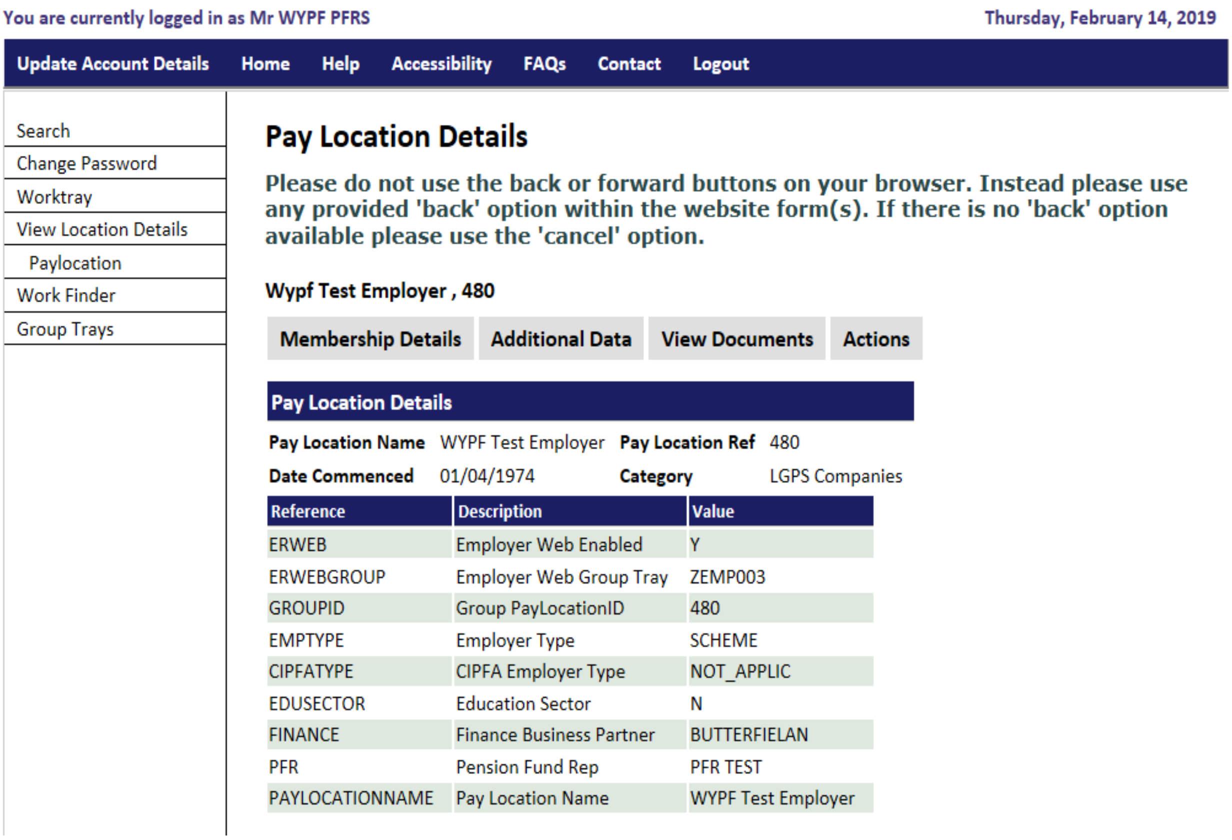
Please make sure you have read and understood our terms and conditions of use for this site at here.

When your log on has been successful you will see the above page. The options on the left-hand side are:

- Search
- Change Password
- Worktray
- View Location Details
- Work Finder
- Group Trays

The **View Location Details** show the employers you are registered to access. The list will expand to show any employers and their pay location that you are linked to.

By double clicking on any of the pay locations you can access the scheme information about the employer, this shows the admission type and other useful information.



You are currently logged in as Mr WYPF PFRS — Thursday, February 14, 2019

Update Account Details | Home | Help | Accessibility | FAQs | Contact | Logout

Search
Change Password
Worktray
View Location Details
Paylocation
Work Finder
Group Trays

Pay Location Details

Please do not use the back or forward buttons on your browser. Instead please use any provided 'back' option within the website form(s). If there is no 'back' option available please use the 'cancel' option.

Wypf Test Employer , 480

Membership Details | Additional Data | View Documents | Actions

Pay Location Details

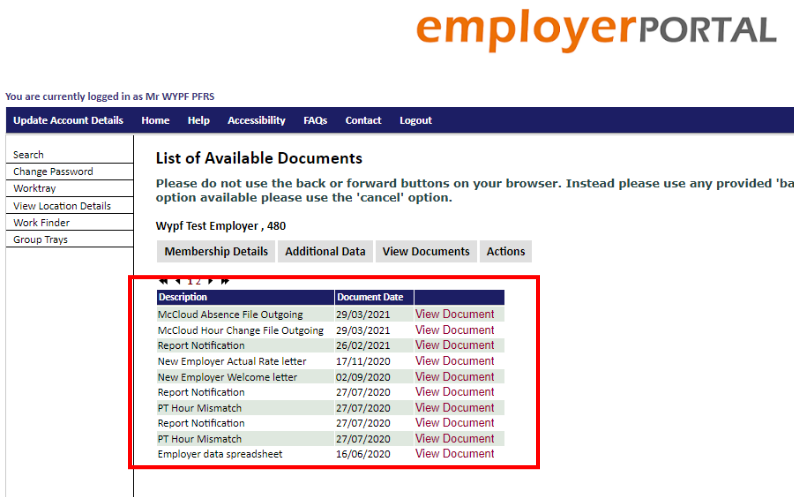
Pay Location Name WYPF Test Employer **Pay Location Ref** 480
Date Commenced 01/04/1974 **Category** LGPS Companies

Reference	Description	Value
ERWEB	Employer Web Enabled	Y
ERWEBGROUP	Employer Web Group Tray	ZEMP003
GROUPID	Group PayLocationID	480
EMPTYPE	Employer Type	SCHEME
CIPFATYPE	CIPFA Employer Type	NOT_APPLIC
EDUSECTOR	Education Sector	N
FINANCE	Finance Business Partner	BUTTERFIELAN
PFR	Pension Fund Rep	PFR TEST
PAYLOCATIONNAME	Pay Location Name	WYPF Test Employer

8. Exception reports

When your monthly return has been processed, we will send your finance contact an e-mail letting them know that your return is finalised and whether you have any exception reports available to view. These exception reports are held on the **employer portal** which can be accessed under the secure administration area of the employer section of our website.

Once you have logged-in to the employer portal you will see on the left-hand menu “View Location Details”, click here and choose the pay location of the employer that you want to see the reports for. Click on View Documents, you will then see the exception reports and other documents listed in date order. You can open the exception report by clicking on view document. The report will then open in Excel once you select “click here to open document in the new window”.



The exception reports are listed below there are 5 but you may not have all 5 every month.

PT Hour Mismatch – Action Required

This spreadsheet can be returned to us to process any hour changes.

When we have processed your monthly return we compare the information that you have provided against the information that we hold on our system. If we have matched a record but the hours that you have provided don't match our system, a PT Hours Mismatch report will be created. You should look at each of these errors and provide us with the correct information.

You only need to view the most recent PT Hours Mismatch Report.

Action required

For straight forward hours changes you can just add the date of the change to the spreadsheet and return to us via Galaxkey (our secure data transfer) to wypfdata@wypf.org.uk for processing. You should **NOT** include notes or change any of the columns on the PT Hours Mismatch spreadsheet. If you need to add notes,

please complete the record maintenance web form using the employer portal. You should also complete this for more complicated hour changes.
Hours are represented as decimals, we will record 15 hours and 45 minutes as 15.75. If you have previously sent us a record maintenance form for a member they will be excluded from the report, so will casual members and those on career breaks.

New starter report – For information purposes only
Do not send a copy of this spreadsheet back to us

We will create a new record for any members which have a date joined scheme on your monthly return. If we can't match the data to an existing record (which we won't if it's a genuine new starter) we will set them up as a new starter. If you are happy with everyone listed on your new starter report you do not need to do anything. If you have members who have been set up in error, please contact your finance business partner or pension fund representative so we can arrange for them to be deleted.
If you find a start date is incorrect then please send an email to pensions@wypf.org.uk and confirm the correct start date. Please provide the members folder reference number so we can ensure we have corrected the appropriate pension record as some members have more than one.

Common problems
Listed are a few examples that can cause a new starter to be created when we don't require one:

- Change in payroll provider and they insert a date joined or date left scheme
- Promotions/change of job within the same organisation – if the employment is consecutive and the pay has increased, please just amend the payroll number and job title if necessary and provide the information for the month of change on one single line for both posts
- If the member has a change of payroll number or job title part way through the month, do not create an additional line.

Leaver notifications required
Do not send a copy of this spreadsheet back to us

If you have told us that a member has left the pension scheme or a member no longer appears on your monthly return but we still hold an active record for them, we will notify you that we need a leaver notification completing.

Action required
For those members that have left, you should complete a leaver notification. You can do this on the employer portal.If the member has not left the scheme, please provide us with an email of why they are not on the monthly return. Send your email to pensions@wypf.org.uk

Complete a Leaver Notification – For all opt outs and Leavers Under Age 55.

Retirement Notification – For Ill Health Retirements (any age) and Leavers Over age 55

Change of Address report – For information purposes only
Do not send a copy of this spreadsheet back to us

This is a list of all the member address updates completed from the data on the Monthly Return.

You don't need to send us any further information for these members, you only need to check that every update on the list is a genuine change of address and not been completed in error. If you are happy with all of the updates on your change of address report you do not need to do anything.

If you have members who have a change of address completed in error, please contact us so that we can arrange for them to be amended. These need to be corrected as soon as possible to ensure data quality.
If this has occurred failure to notify us may result in a potential data breach.

Retirement Reconciliation mismatch – Possible Action required
Do not send a copy of this spreadsheet back to us

This report will show a list of retired members where the Cumulative Pensionable Pay (CPP) received on the monthly file differs from the information you have provided to us on the retirement notification.

The report should act as a check list for you to work through and provide us with any necessary additional pay forms to instruct us to re calculate the members retirement benefits using the correct Cumulative Pensionable Pay (CPP).

If there is already a recalculation on the record, we won't include these members on the mismatch report.

The report will only show mismatches that have been identified that month, they will not reappear over to the next month's report, therefore it is important that you review the retirement reconciliation report every month to ensure that you are sending us the necessary additional pay forms.

Limitations to the Retirement Reconciliation Report

Cases where we process the retirement late, for example the retirement notification is received months after retirement or if member sends claim form late and all postings are received, if there is a discrepancy between monthly postings and retirement notification

Pay received in the next financial year, for example back dated pay awards

For these types of cases, where a recalculation applies, you will need to send us an additional pay form however they won't appear on the mismatch report.

Action required

We need you to give us an instruction to recalculate the retirement benefits based on the correct CPP by completing an additional pay form via the employer portal. You must ensure that the CPP matches what you have provided on the monthly return.

9. Work-trays

Work trays are there to assist with the production of annual pension statements

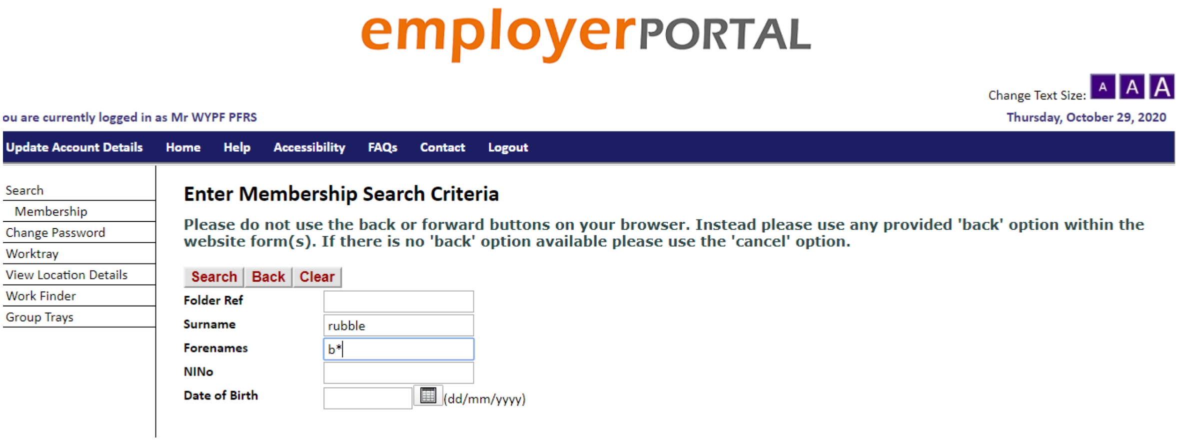
- Group Tray – is where the queries for your organisation (or group of organisations) will initially land. All users registered to the organisation will be able to view the items of work here
- Work-tray – is a user's personal work tray. Items of work need moving from the group tray into a work tray before it can be viewed and a response provided
- Work Finder – lets you look at everyone else registered to your organisation. You can also use it to find which user has any work items and who it relates to

10. Changing your password

You can change your password from the home screen, you should be prompted to do this when you first log on to the employer portal but if not, please change your password on your first use.

11. Searching for members

From the employer portal homepage, you will need to select "search" from the left-hand navigation bar and then select "membership", you will then see the search screen:

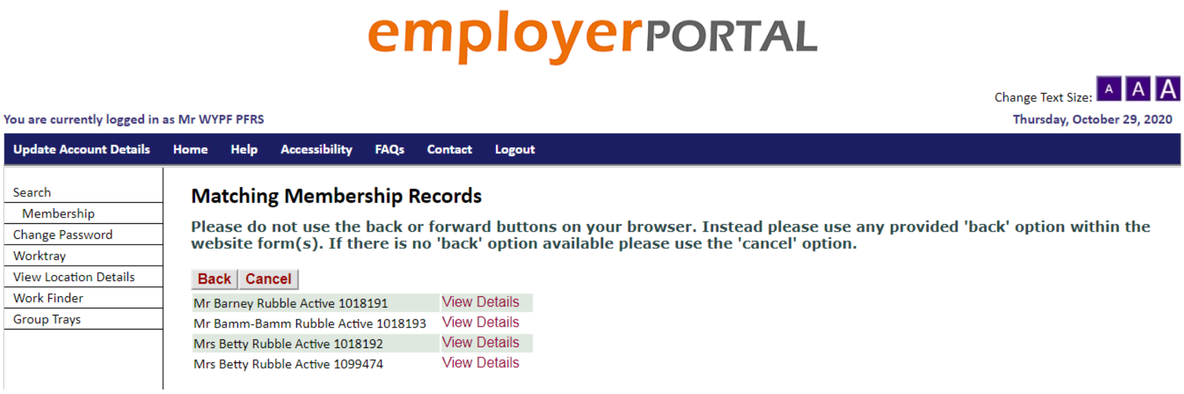


You can search using Surname, Forenames, National Insurance Number and Date of Birth. At present every job has an individual pension record, therefore, to avoid missing records you should search using name and National Insurance Number.

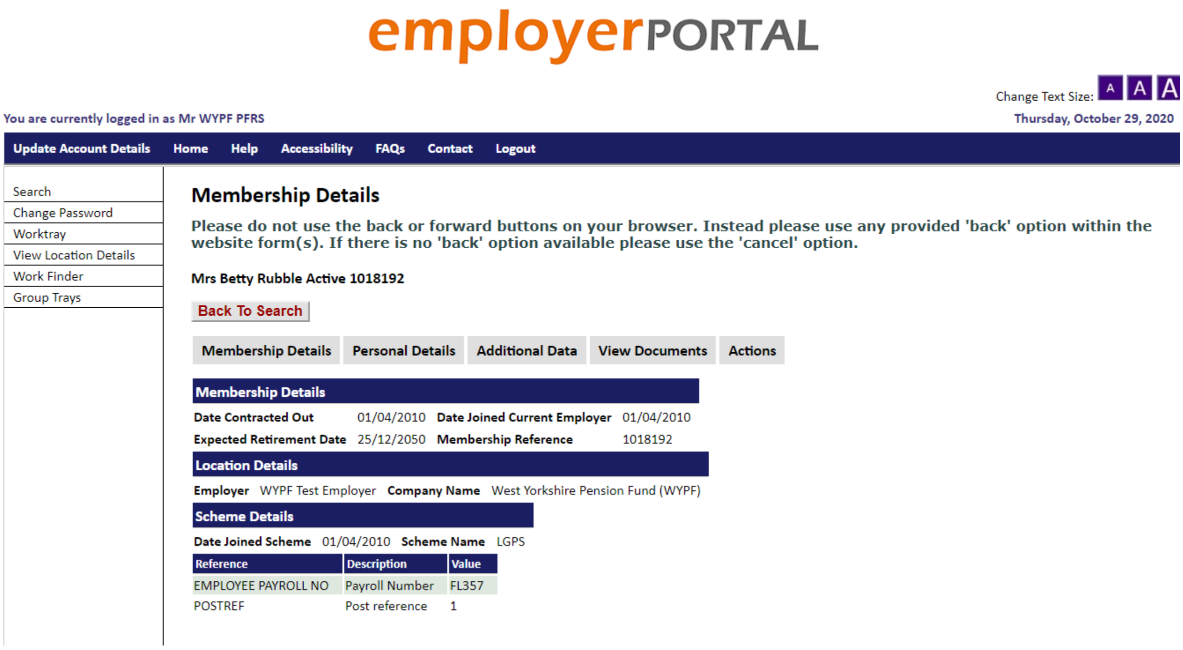
When searching use a * after the forename unless you know the members full name. If you search for Betty Rubble and the member is called Betty Rose Rubble the record will not appear unless you enter Betty*

Once you have entered the details click on the search button and your results will be returned.

The search results will display the full name of the member, the folder reference number and the status of the record. To select the correct record, click on the View Details button. The member’s details will then be displayed.



12. Membership Details



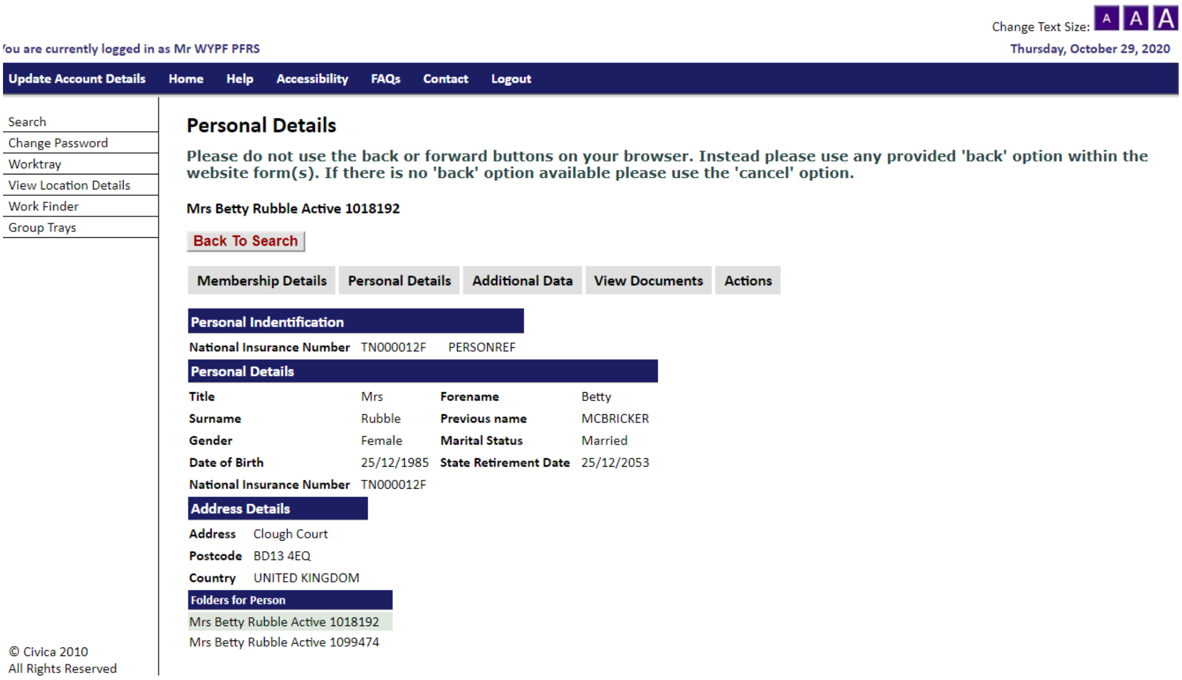
The Membership Details screen shows:

- Date Contracted Out (Contracted Out ended 05/04/2016)
- Date Joined Current Employer
- Expected Retirement Date
- Membership Reference (member number)
- Employer & Company Name
- Date Joined Scheme & Scheme Name
- Employee Payroll Number
- Post Reference Number

13. Personal Details

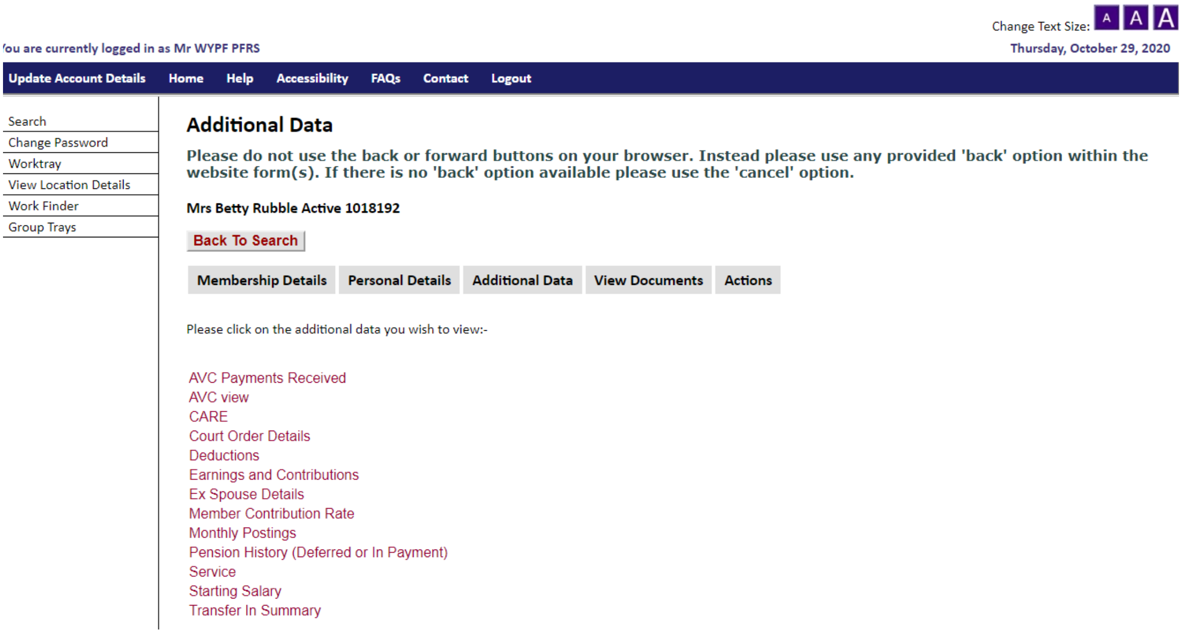
Under Personal Details you will be able to see:

- Personal Identification - National Insurance Number
- Personal Details (title, forename, surname, previous name, gender, marital status, date of birth, state retirement date and Nino)
- Address Details (current address)
- Any other jobs with your organisation that the member has a pension record for.



For all other details you will need to use the Additional Data tab:

14. Additional Data



All of these views will appear even if the member has no data to display:

AVC Payments Received

If any additional member contributions have been received, they will be displayed on this screen.

AVC View

The AVC view will confirm if additional member contributions are being paid.

CARE

Gives details of the pension the member has built up since 1 April 2014

Court Order Details

If the member has been through a divorce, they may be subject to a pension sharing order, it is important to check this information as the estimate calculations will NOT be correct if a pension sharing order is recorded.

Deductions

This screen will show if any deductions are due from the member’s pension when it is put into payment, it is also important to check this screen as any estimate calculations will NOT be correct if deductions are present. (I.e. Pension Sharing Order)

Earnings and Contributions

The earnings and contributions screen shows:

- The full-time rate of pay
- The actual pensionable pay received
- The employer contributions
- The employee contributions
- Any additional amount received

Ex Spouse Details

This will show the details of the ex-spouse that the pension sharing order is for.

Member Contribution Rate

Shows the contribution rate the member is paying, this will have been updated from information that has been provided at the date of joining.

Monthly Postings

Shows data uploaded from the monthly return relevant to the member.

Pension History (Deferred or In Payment)

The pension history screen shows the value of deferred benefits and pensioner benefits that are due to be paid or are in payment.

Service

The service screen shows the hours and changes that have been applied to a member's service throughout their employment.

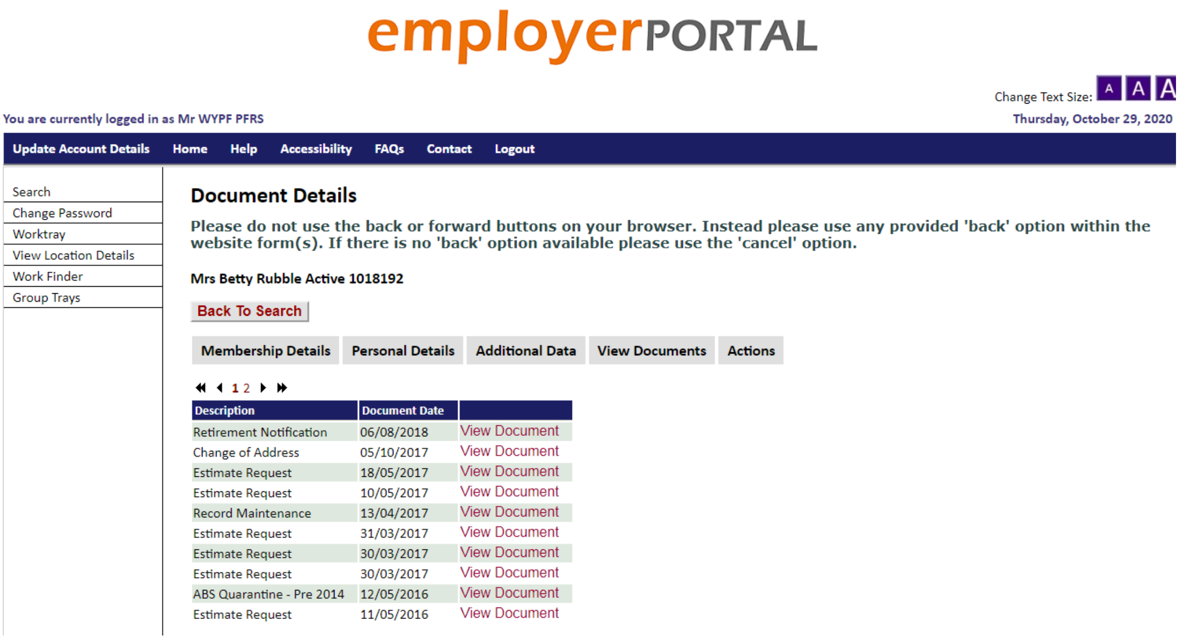
Starting Salary

This shows the members starting salary.

Transfer in Summary

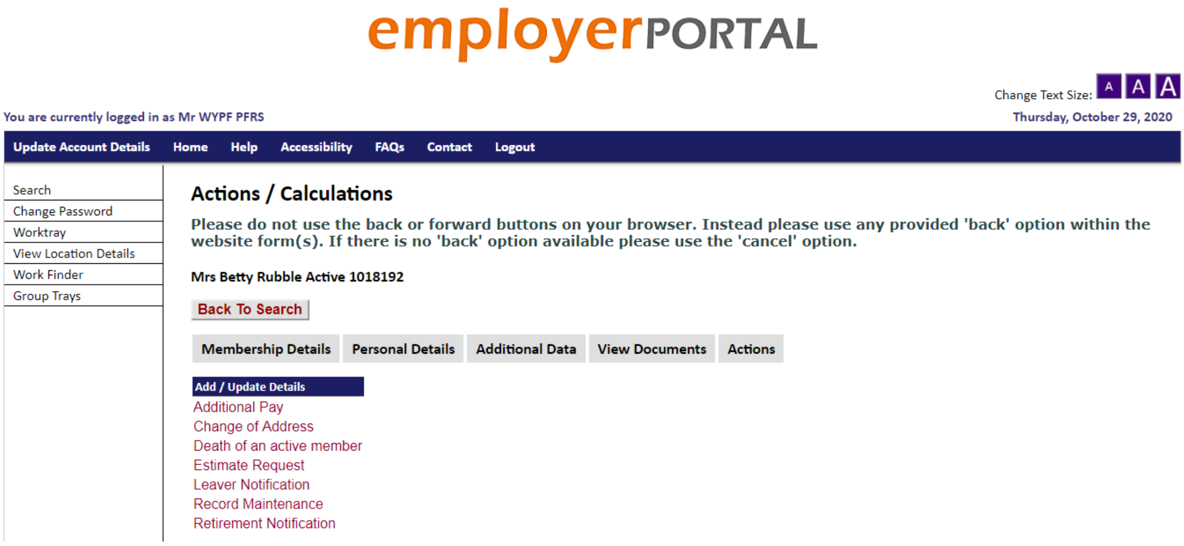
This screen will show any details of a members transfer from a previous provider if one has been received by us.

15. View Documents



You will be able to see documents that you have created on the employer portal and also any documents that have been sent to the employer.

16. Actions



The **Actions** tab on the employer portal is where the online forms are kept which allow you to submit changes or request information directly to us securely.

The actions that you can currently perform are:

- Additional Pay (notifying us of a revised pay figure)
- Change of Address
- Death of an active member
- Estimate Request
- Leaver Notification
- Record Maintenance
- Retirement Notification

If you need any help in completing these online forms, please contact your Employer Pension Fund Representative.

17. Contact us

If you need to contact us please phone our employer helpline on 01274 434900 or e-mail wypf.prf@wypf.org.uk

Employer Relations Manager

Ammie McHugh	ammie.mchugh@wypf.org.uk	01274 432763

Employer Pension Fund Representatives

Sheryl Clapham	sheryl.clapham@wypf.org.uk	01274 432541
David Parrington	david.parrington@wypf.org.uk	01274 433840
Kaele Pilcher	kaele.pilcher@wypf.org.uk	01274 432739
Richard Quinn	richard.quinn@wypf.org.uk	07815 476781
Ahmed Surtee	ahmed.surtee@wypf.org.uk	07815 476850
Finola Middleton	finola.middleton@wypf.org.uk	01274 432726
Mark Morris	mark.morris@wypf.org.uk	07484 918008

Employer Pension Service Support Officer

Sally Tomlinson	sally.tomlinson@wypf.org.uk	01274 432115

18. Deactivating an authorised user account

The user must inform us when they are leaving or no longer require access to the secure administration facility. Where the user is unable to notify us, it is the responsibility of the main contacts at the employing organisation to send the notification. Accounts should be deactivated as soon as possible after it is known that the account is no longer required.

New authorised user lists or a main contact registration form must be completed to show all current authorised users. We only reference the latest form when we check if a user is authorised.