Employer Portal Manual

Index **Page**

1. Activating an account

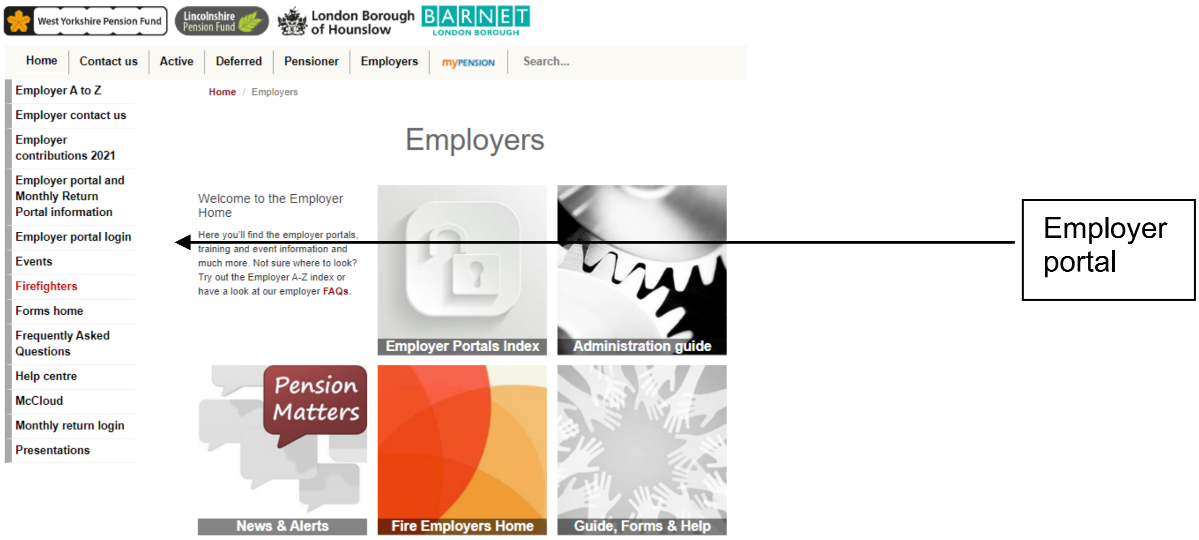
To sign up for the employer portal you need to be added to either the main contact registration form, authorised employer user list or authorised payroll user list. The form then needs to be signed by someone who is a current registered authorised signatory.
All forms are available in the employers section on our website at www.wypf.org.uk under Employer portal and Monthly Return Portal information.

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 Sally Tomlinson, WYPF, PO Box 67, Bradford, BD1 1UP.

A separate login will be requested for each user.

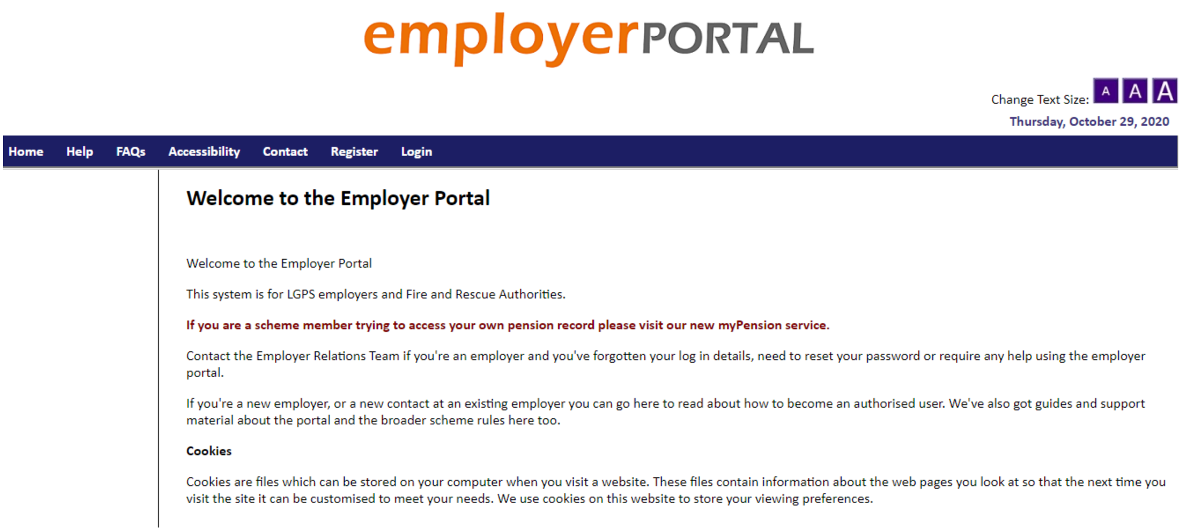
2. Accessing the employer portal

To access the employer portal, select Employer portal login from the menu on the left hand side



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

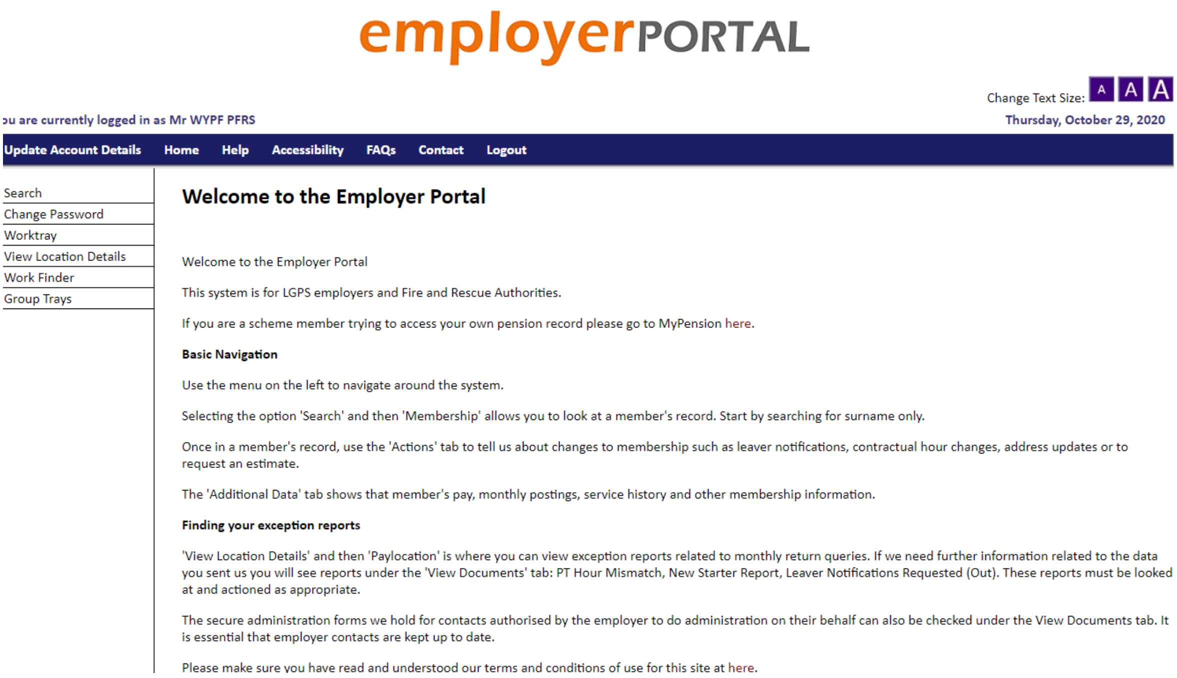
You will then be given your temporary password to login to the employer portal.

Your user name is generally your surname & first initial, for example John Smith will have a user name of SMITHJ. User names 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.
Please don't use the Forgotten Password option; this is only for My Pension.
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

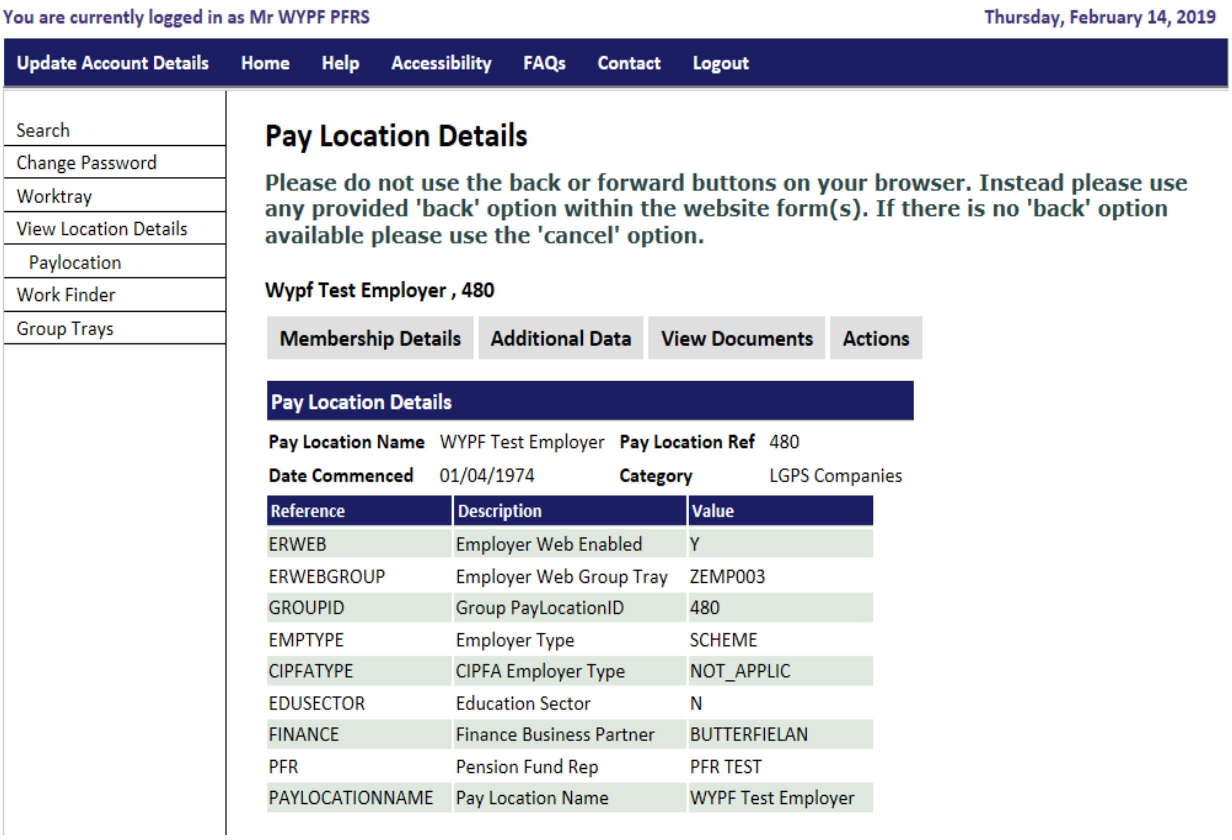


When your log on has been successful you will see the above page. The options on the left hand side are:

- 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

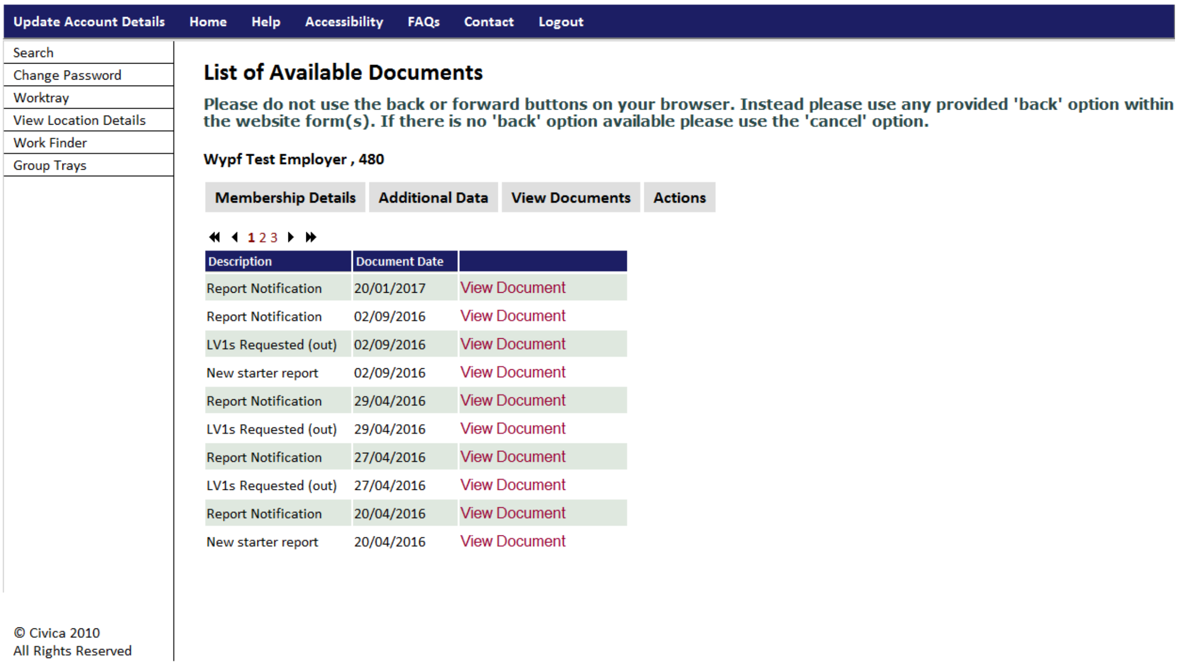
Pay Location Name WYPF Test Employer **Pay Location Ref** 480

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

The exception reports can be found under the **View Documents** tab and are created once we have processed your monthly return. We will e-mail the finance contact named on your main contact form to let them know the reports are ready to view. You can open the exception report by double clicking the relevant document type. The report will then open in Excel.



The exception reports available from the monthly returns are: -

- **PT Hour Mismatch** – Hours on your return do not match the hours we currently hold on our system (complete the spreadsheet with date of the hour change and send to wypfdata@wypf.org.uk. Do not add any notes to the spreadsheet) Or alternatively complete the Record Maintenance web form on the portal.
- **Leaver notifications required** – for leavers who are eligible for a refund or a deferred benefit (complete leaver/retirement notification on the portal)

- **New starter report** – a list of new member records we have created from your monthly return (for information purposes only. If any records have been created in error contact your finance business partner)
- **Change of address report** – a list of members who have had their address changed on our system to match your data from your monthly return (for information purposes only. If an address change has been completed in error contact your finance business partner or the contact centre immediately. Failure to notify us may result in a potential data breach)

9. Work-trays

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

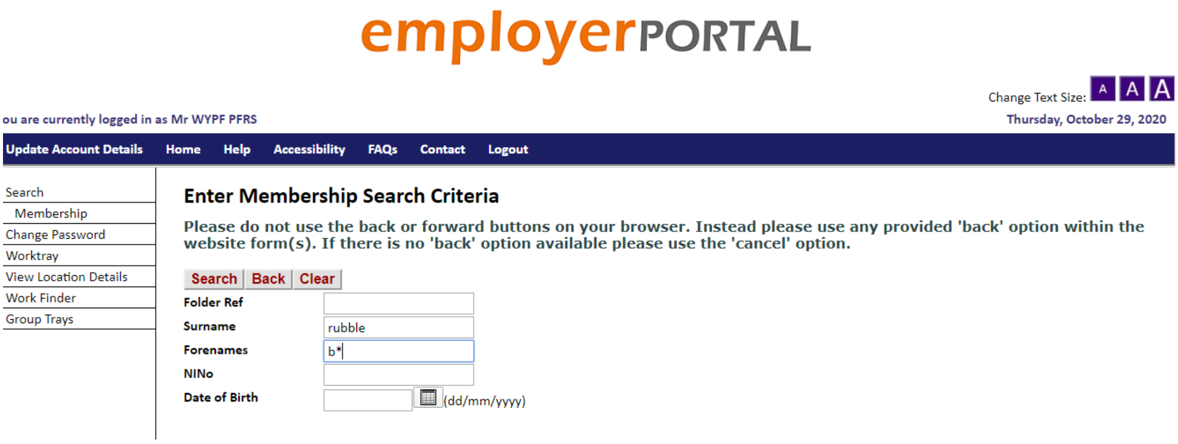
- Group Tray – is where the queries for your organisation (or group of organisations) will initially land. All users registered to the organisation will be able to view the items of work here
- Work-tray – is a user's personal work tray. Items of work need moving from the group tray into a work tray 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:

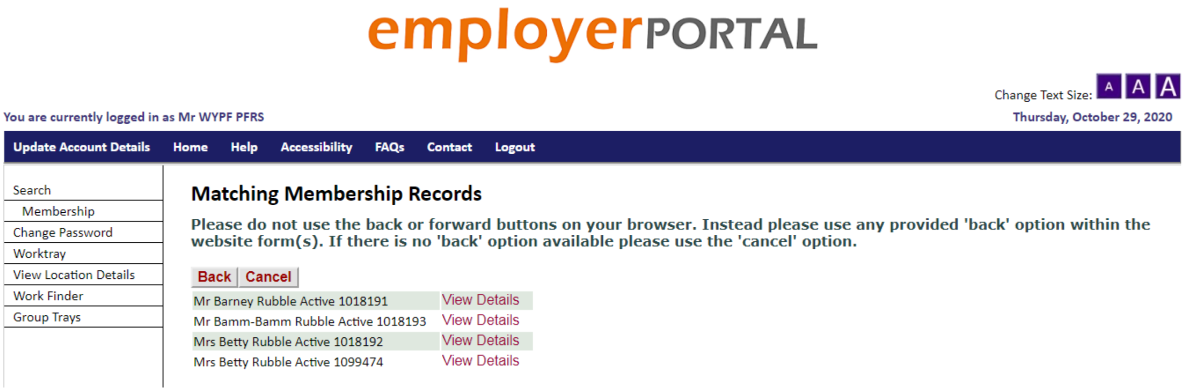


You can search using Surname, Forenames, NiNo and Date of Birth. At present every job has an individual pension record, therefore to avoid missing records you should search using name and National Insurance Number.

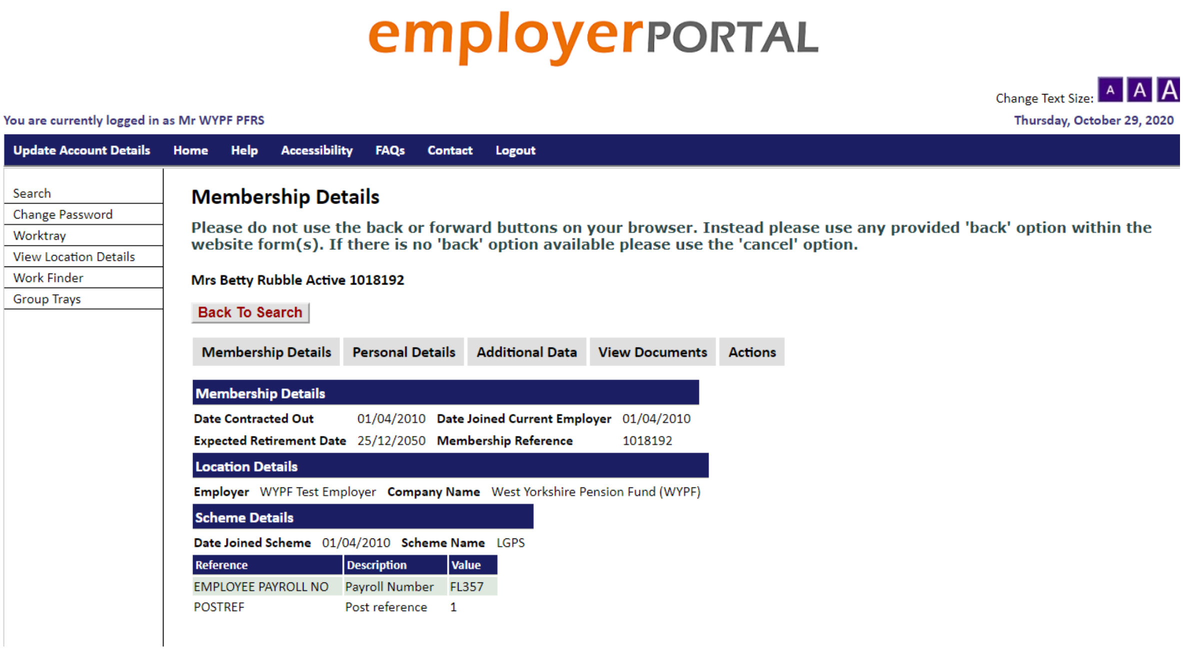
When searching use a * after the forename unless you know the members full name. If you search for Betty Rubble and the member is called Betty Rose Rubble the record will not appear unless you enter Betty*

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:

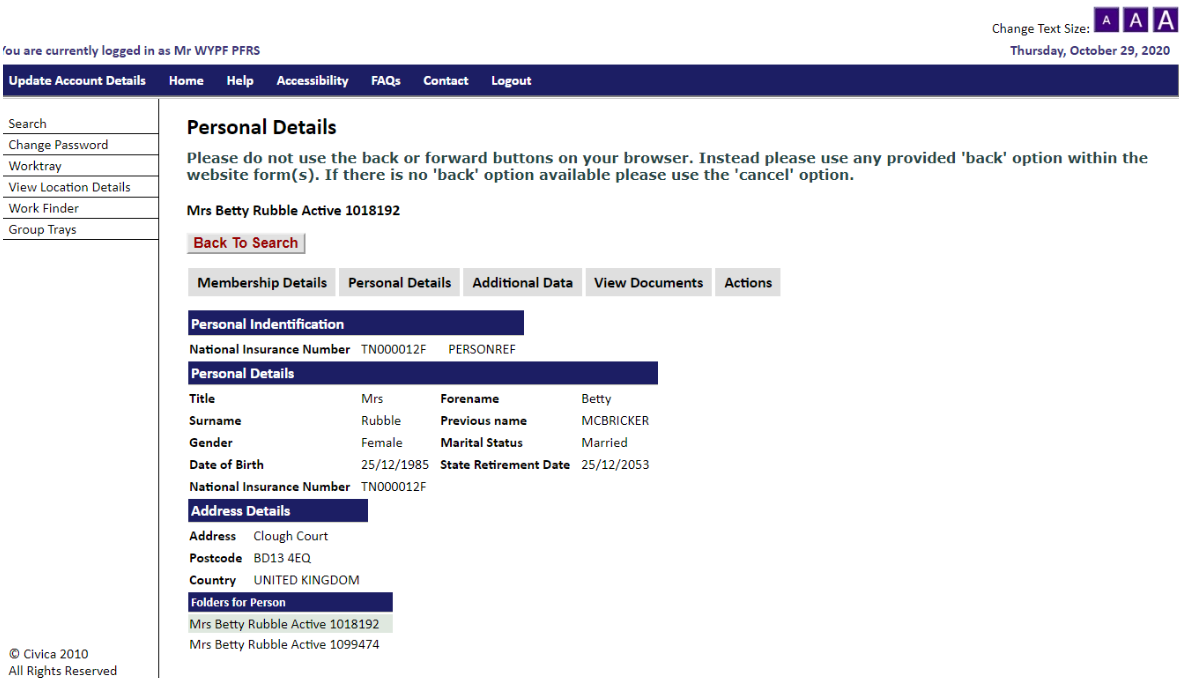
- Date Contracted Out (Contracted Out ended 05/04/2016)
- Date Joined Current Employer
- Expected Retirement Date
- Membership Reference (member number)
- Employer & Company Name
- Date Joined Scheme & Scheme Name

- 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.


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
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Personal 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.

Mrs Betty Rubble Active 1018192

Back To Search

Membership Details | Personal Details | Additional Data | View Documents | Actions

Personal Indentification

National Insurance Number	TN000012F	PERSONREF

Personal Details

Title	Mrs	Forename	Betty
Surname	Rubble	Previous name	MCBRICKER
Gender	Female	Marital Status	Married
Date of Birth	25/12/1985	State Retirement Date	25/12/2053
National Insurance Number	TN000012F		

Address Details

Address	Clough Court
Postcode	BD13 4EQ
Country	UNITED KINGDOM

Folders for Person

Mrs Betty Rubble Active 1018192
Mrs Betty Rubble Active 1099474

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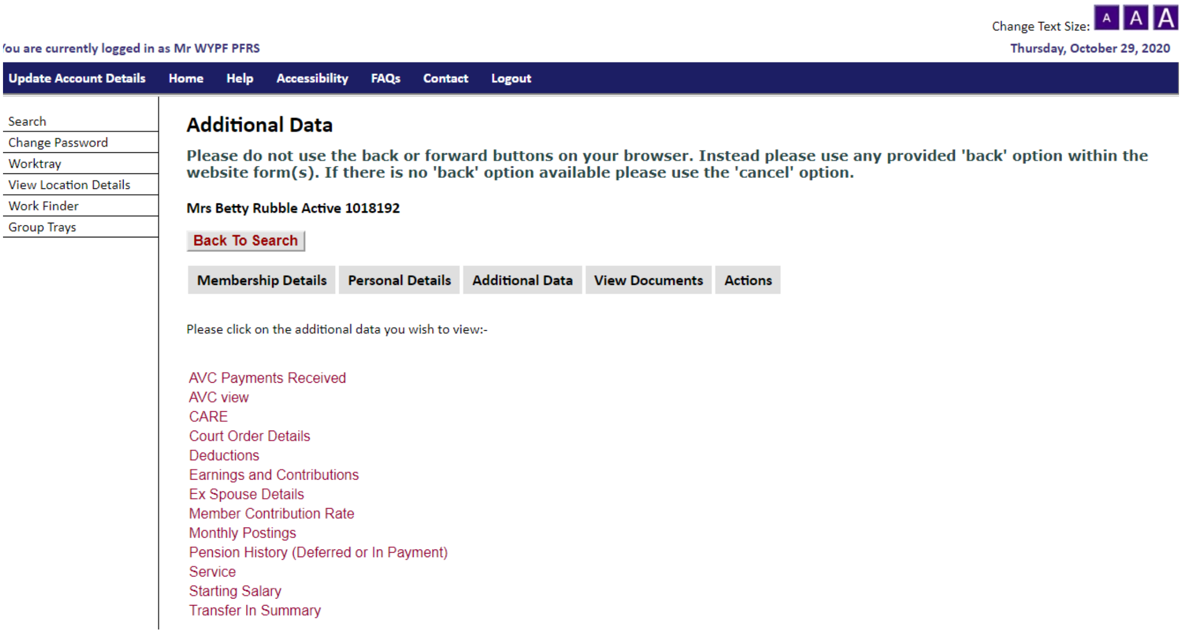
For all other details you will need to use the Additional Data tab:

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 in to 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 members service throughout their employment.

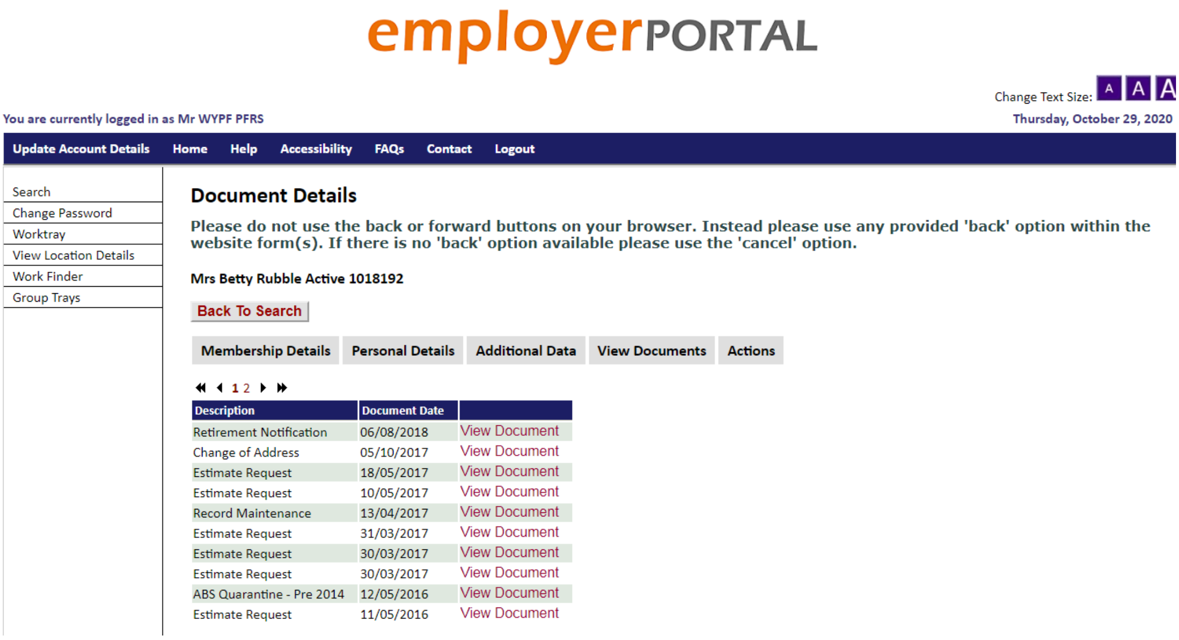
Starting Salary

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



employerPORTAL

Change Text Size: A A A

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Thursday, October 29, 2020

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Document Details

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Mrs Betty Rubble Active 1018192

Back To Search

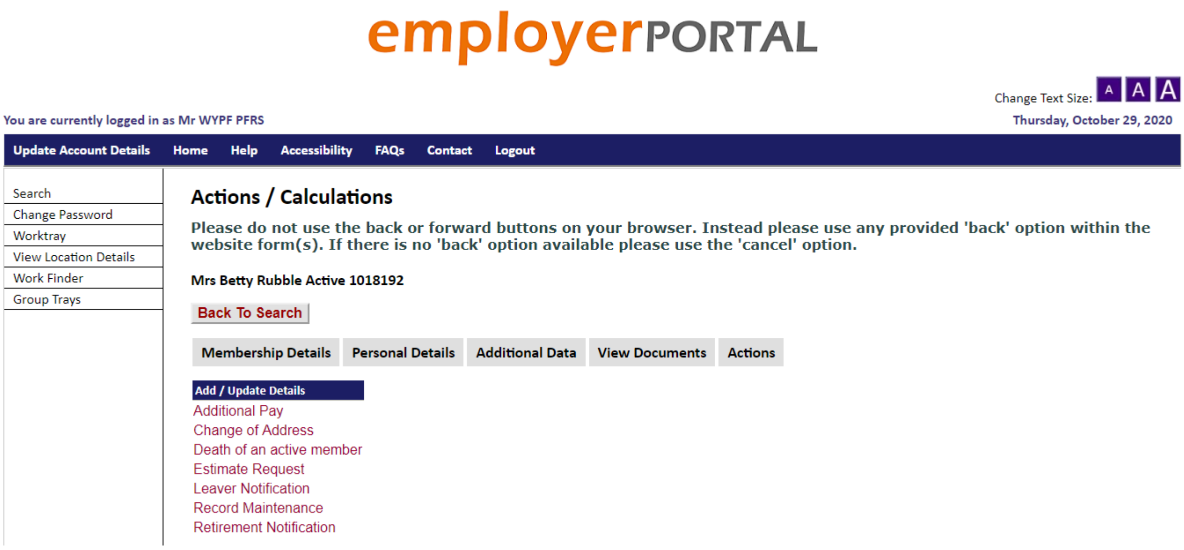
Membership Details | Personal Details | Additional Data | View Documents | Actions

1 2

Description	Document Date	
Retirement Notification	06/08/2018	View Document
Change of Address	05/10/2017	View Document
Estimate Request	18/05/2017	View Document
Estimate Request	10/05/2017	View Document
Record Maintenance	13/04/2017	View Document
Estimate Request	31/03/2017	View Document
Estimate Request	30/03/2017	View Document
Estimate Request	30/03/2017	View Document
ABS Quarantine - Pre 2014	12/05/2016	View Document
Estimate Request	11/05/2016	View Document

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.