



**London Borough  
of Hounslow**



# Employer Portal Manual

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## **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](http://www.wypf.org.uk) under Employer portal and Monthly Return Portal information.

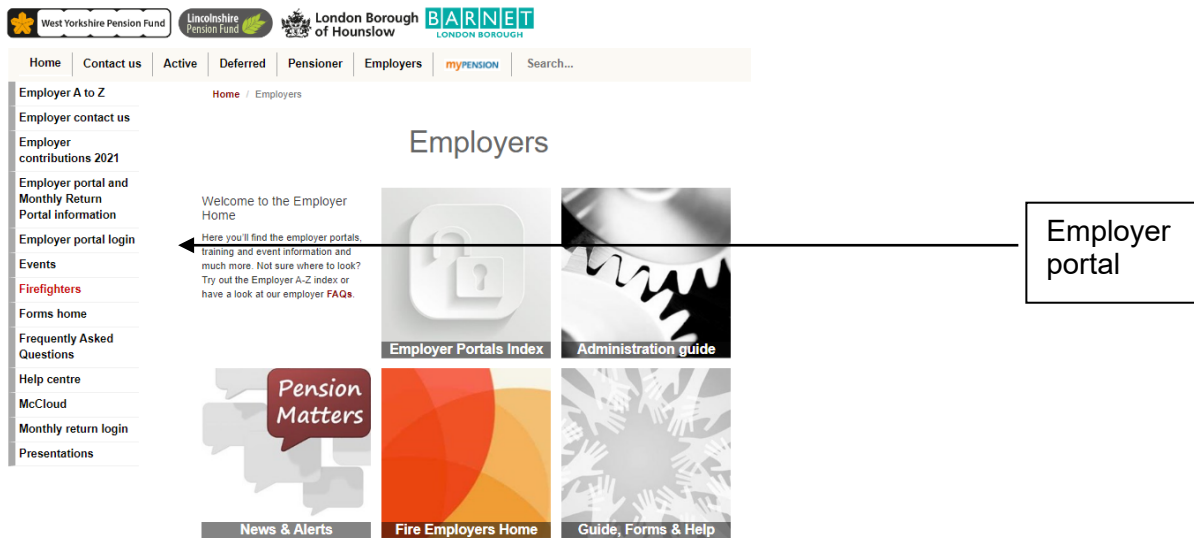
All new users need to complete a secure administration user agreement form. This requires each user to agree to the terms and conditions by signing and dating the form.

Scan and e-mail the completed forms to [wypf.pfr@wypf.org.uk](mailto: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

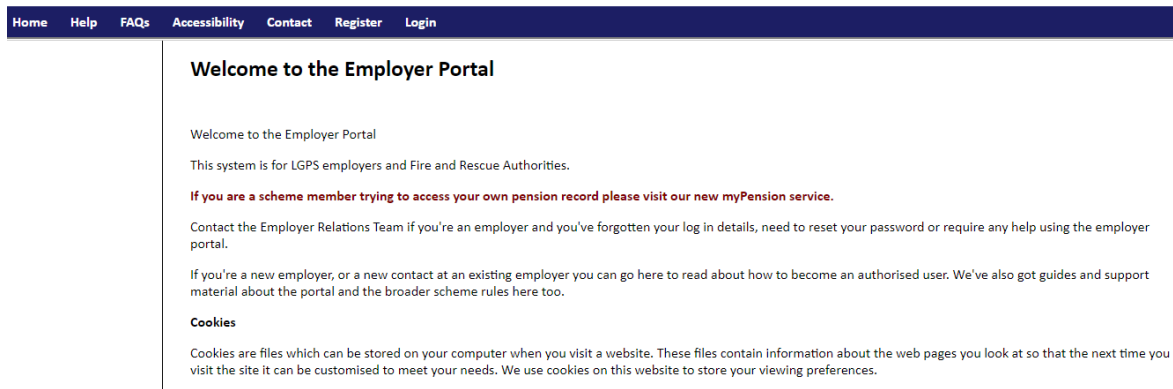


## 3. Employer portal home page

The first screen you will see is this.

# employerPORTAL

Change Text Size: [A](#) [A](#) [A](#)  
Thursday, October 29, 2020



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

# employerPORTAL

Change Text Size: [A](#) [A](#) [A](#)  
Thursday, October 29, 2020

You are currently logged in as Mr WYPPF PFRS

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search	<h3>Welcome to the Employer Portal</h3> <p>Welcome to the Employer Portal</p> <p>This system is for LGPS employers and Fire and Rescue Authorities.</p> <p>If you are a scheme member trying to access your own pension record please go to <a href="#">MyPension here</a>.</p> <p><b>Basic Navigation</b></p> <p>Use the menu on the left to navigate around the system.</p> <p>Selecting the option 'Search' and then 'Membership' allows you to look at a member's record. Start by searching for surname only.</p> <p>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.</p> <p>The 'Additional Data' tab shows that member's pay, monthly postings, service history and other membership information.</p> <p><b>Finding your exception reports</b></p> <p>'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.</p> <p>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.</p> <p>Please make sure you have read and understood our terms and conditions of use for this site at <a href="#">here</a>.</p>
Change Password	
Worktray	
View Location Details	
Work Finder	
Group Trays	

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

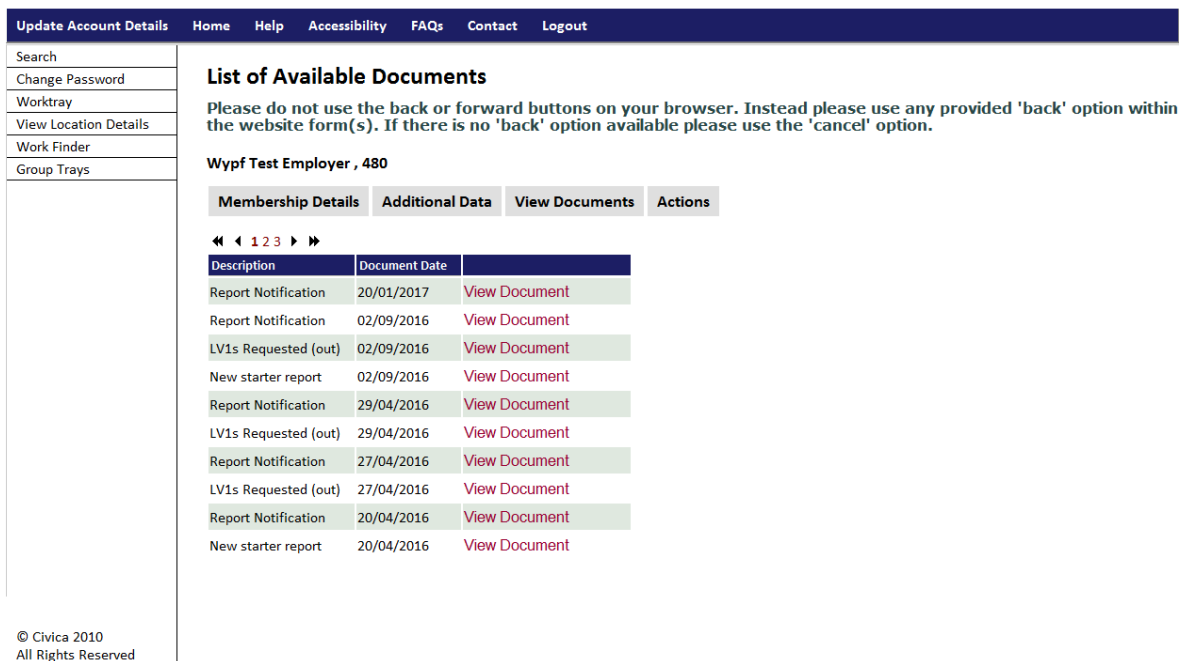
**Pay Location Name** WYPF Test Employer **Pay Location Ref** 480  
**Date Commenced** 01/04/1974 **Category** LGPS Companies

Reference	Description	Value
ERWEB	Employer Web Enabled	Y
ERWEBGROUP	Employer Web Group Tray	ZEMP003
GROUPID	Group PayLocationID	480
EMPTYTYPE	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.



Update Account Details Home Help Accessibility FAQs Contact Logout

Search  
Change Password  
Worktray  
View Location Details  
Work Finder  
Group Trays

### List of Available Documents

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

« ‹ 1 2 3 › »

Description	Document Date	
Report Notification	20/01/2017	<a href="#">View Document</a>
Report Notification	02/09/2016	<a href="#">View Document</a>
LV1s Requested (out)	02/09/2016	<a href="#">View Document</a>
New starter report	02/09/2016	<a href="#">View Document</a>
Report Notification	29/04/2016	<a href="#">View Document</a>
LV1s Requested (out)	29/04/2016	<a href="#">View Document</a>
Report Notification	27/04/2016	<a href="#">View Document</a>
LV1s Requested (out)	27/04/2016	<a href="#">View Document</a>
Report Notification	20/04/2016	<a href="#">View Document</a>
New starter report	20/04/2016	<a href="#">View Document</a>

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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](mailto: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:

The screenshot shows the 'employerPORTAL' interface. At the top right, there are accessibility icons and the date 'Thursday, October 29, 2020'. A navigation bar contains links for 'Update Account Details', 'Home', 'Help', 'Accessibility', 'FAQs', 'Contact', and 'Logout'. On the left, a sidebar menu lists 'Search', 'Membership', 'Change Password', 'Worktray', 'View Location Details', 'Work Finder', and 'Group Trays'. The main content area is titled 'Enter Membership Search Criteria' and includes a warning: '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.' Below this are three buttons: 'Search', 'Back', and 'Clear'. The search form contains the following fields: 'Folder Ref' (empty), 'Surname' (filled with 'rubble'), 'Forenames' (filled with 'b\*'), 'NiNo' (empty), and 'Date of Birth' (empty with a calendar icon and a placeholder '(dd/mm/yyyy)').

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.

# employerPORTAL

You are currently logged in as Mr WYPF PFRS Change Text Size: [A](#) [A](#) [A](#)  
Thursday, October 29, 2020

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search	<h3>Matching Membership Records</h3> <p>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.</p> <p><a href="#">Back</a> <a href="#">Cancel</a></p> <table><tr><td>Mr Barney Rubble Active 1018191</td><td><a href="#">View Details</a></td></tr><tr><td>Mr Bamm-Bamm Rubble Active 1018193</td><td><a href="#">View Details</a></td></tr><tr><td>Mrs Betty Rubble Active 1018192</td><td><a href="#">View Details</a></td></tr><tr><td>Mrs Betty Rubble Active 1099474</td><td><a href="#">View Details</a></td></tr></table>	Mr Barney Rubble Active 1018191	<a href="#">View Details</a>	Mr Bamm-Bamm Rubble Active 1018193	<a href="#">View Details</a>	Mrs Betty Rubble Active 1018192	<a href="#">View Details</a>	Mrs Betty Rubble Active 1099474	<a href="#">View Details</a>
Mr Barney Rubble Active 1018191		<a href="#">View Details</a>							
Mr Bamm-Bamm Rubble Active 1018193		<a href="#">View Details</a>							
Mrs Betty Rubble Active 1018192		<a href="#">View Details</a>							
Mrs Betty Rubble Active 1099474		<a href="#">View Details</a>							
Membership									
Change Password									
Worktray									
View Location Details									
Work Finder									
Group Trays									

## 12. Membership Details

# employerPORTAL

You are currently logged in as Mr WYPF PFRS Change Text Size: [A](#) [A](#) [A](#)  
Thursday, October 29, 2020

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search	<h3>Membership Details</h3> <p>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.</p> <p><b>Mrs Betty Rubble Active 1018192</b></p> <p><a href="#">Back To Search</a></p> <p><a href="#">Membership Details</a> <a href="#">Personal Details</a> <a href="#">Additional Data</a> <a href="#">View Documents</a> <a href="#">Actions</a></p> <p><b>Membership Details</b></p> <table><tr><td>Date Contracted Out</td><td>01/04/2010</td><td>Date Joined Current Employer</td><td>01/04/2010</td></tr><tr><td>Expected Retirement Date</td><td>25/12/2050</td><td>Membership Reference</td><td>1018192</td></tr></table> <p><b>Location Details</b></p> <table><tr><td>Employer</td><td>WYPF Test Employer</td><td>Company Name</td><td>West Yorkshire Pension Fund (WYPF)</td></tr></table> <p><b>Scheme Details</b></p> <table><tr><td>Date Joined Scheme</td><td>01/04/2010</td><td>Scheme Name</td><td>LGPS</td></tr><tr><th>Reference</th><th>Description</th><th>Value</th><td></td></tr><tr><td>EMPLOYEE PAYROLL NO</td><td>Payroll Number</td><td>FL357</td><td></td></tr><tr><td>POSTREF</td><td>Post reference</td><td>1</td><td></td></tr></table>	Date Contracted Out	01/04/2010	Date Joined Current Employer	01/04/2010	Expected Retirement Date	25/12/2050	Membership Reference	1018192	Employer	WYPF Test Employer	Company Name	West Yorkshire Pension Fund (WYPF)	Date Joined Scheme	01/04/2010	Scheme Name	LGPS	Reference	Description	Value		EMPLOYEE PAYROLL NO	Payroll Number	FL357		POSTREF	Post reference	1	
Date Contracted Out		01/04/2010	Date Joined Current Employer	01/04/2010																									
Expected Retirement Date		25/12/2050	Membership Reference	1018192																									
Employer		WYPF Test Employer	Company Name	West Yorkshire Pension Fund (WYPF)																									
Date Joined Scheme		01/04/2010	Scheme Name	LGPS																									
Reference		Description	Value																										
EMPLOYEE PAYROLL NO		Payroll Number	FL357																										
POSTREF	Post reference	1																											
Change Password																													
Worktray																													
View Location Details																													
Work Finder																													
Group Trays																													

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.

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You are currently logged in as Mr WYPF PFRS

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search  
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Group Trays

### 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 Identification

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

You are currently logged in as Mr WYPF PFRS

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[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

[Search](#)  
[Change Password](#)  
[Worktray](#)  
[View Location Details](#)  
[Work Finder](#)  
[Group Trays](#)

### Additional Data

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](#)

Please click on the additional data you wish to view:-

- [AVC Payments Received](#)
- [AVC view](#)
- [CARE](#)
- [Court Order Details](#)
- [Deductions](#)
- [Earnings and Contributions](#)
- [Ex Spouse Details](#)
- [Member Contribution Rate](#)
- [Monthly Postings](#)
- [Pension History \(Deferred or In Payment\)](#)
- [Service](#)
- [Starting Salary](#)
- [Transfer In Summary](#)

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

The screenshot displays the 'employerPORTAL' interface. At the top, it says 'You are currently logged in as Mr WYPP PFRS' and 'Thursday, October 29, 2020'. The main navigation bar includes 'Update Account Details', 'Home', 'Help', 'Accessibility', 'FAQs', 'Contact', and 'Logout'. A sidebar on the left contains links for 'Search', 'Change Password', 'Worktray', 'View Location Details', 'Work Finder', and 'Group Trays'. The main content area is titled 'Document Details' and includes a warning: '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.' Below this, it identifies the user as 'Mrs Betty Rubble Active 1018192' and provides a 'Back To Search' button. A tabbed interface shows 'View Documents' as the active tab. A table lists the following documents:

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

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

You are currently logged in as Mr WYPF PFRS

Change Text Size: [A](#) [A](#) [A](#)

Thursday, October 29, 2020

[Update Account Details](#) [Home](#) [Help](#) [Accessibility](#) [FAQs](#) [Contact](#) [Logout](#)

Search

Change Password

Worktray

View Location Details

Work Finder

Group Trays

### Actions / Calculations

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](#)

[Add / Update Details](#)

- [Additional Pay](#)
- [Change of Address](#)
- [Death of an active member](#)
- [Estimate Request](#)
- [Leaver Notification](#)
- [Record Maintenance](#)
- [Retirement Notification](#)

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](mailto:wypf.prf@wypf.org.uk)

### **Employer Relations Manager**

Ammie McHugh     [ammie.mchugh@wypf.org.uk](mailto:ammie.mchugh@wypf.org.uk)     01274 432763

### **Employer Pension Fund Representatives**

Sheryl Clapham     [sheryl.clapham@wypf.org.uk](mailto:sheryl.clapham@wypf.org.uk)     01274 432541

David Parrington     [david.parrington@wypf.org.uk](mailto:david.parrington@wypf.org.uk)     01274 433840

Kaele Pilcher     [kaele.pilcher@wypf.org.uk](mailto:kaele.pilcher@wypf.org.uk)     01274 432739

Richard Quinn     [richard.quinn@wypf.org.uk](mailto:richard.quinn@wypf.org.uk)     07815 476781

Ahmed Surtee     [ahmed.surtee@wypf.org.uk](mailto:ahmed.surtee@wypf.org.uk)     07815 476850

Finola Middleton     [finola.middleton@wypf.org.uk](mailto:finola.middleton@wypf.org.uk)     01274 432726

Mark Morris     [mark.morris@wypf.org.uk](mailto:mark.morris@wypf.org.uk)     07484 918008

### **Employer Pension Service Support Officer**

Sally Tomlinson     [sally.tomlinson@wypf.org.uk](mailto: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.