Changes to the Monthly Contributions Process

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What's staying the same…

The requirement to submit data to us on a monthly basis

The file specification

The statutory deadline of the 19th of the following month contributions are deducted to submit your return
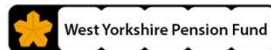
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What's staying the same…

- The monthly contribution spreadsheet and formatting of data will remain as it does now
- Any reports you run to obtain your data will still be relevant
- Exception reports will still be produced and require action where necessary

Exception Report	Action Required
Part Time hours mis match	Populate date of hours change and return to wypf.data@wypf.org.uk
Leavers	Complete online leaver notification
Change of Address	Check update is correct
New Starter	Check genuine new starter

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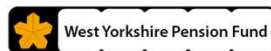
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What's changing?

| The portal where you upload and submit your monthly return | Queries your finance business partner identifies after your return has been submitted will now be dealt with by the employer before final submission | Employers will clear these errors and warnings in the new portal |

This will require time spent upfront prior to 19th to ensure you still meet the statutory requirements

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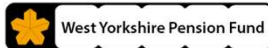
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New to MC3

Multiple users can access the submission at the same time and work on the errors & warnings simultaneously

It saves any changes/actions made and allows you to log back in later to pick up where you left off

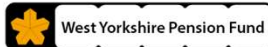Ongoing development, we will aim to continually improve the system to make it more user friendly

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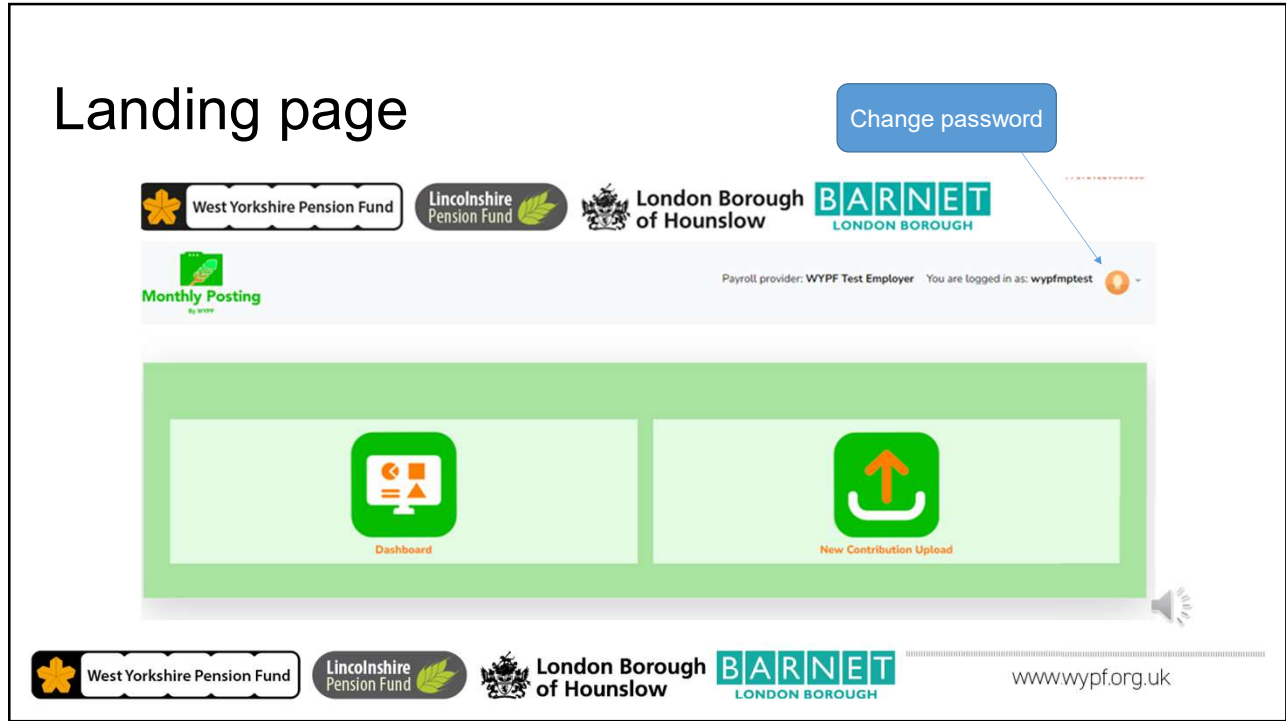
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WYPF Monthly Posting Login

Monthly Posting
By WYPF

If you have any problem or would like to get in touch with WYPF finance team, please contact your *Finance Business Partner.*

Username *

Password *

LOGIN

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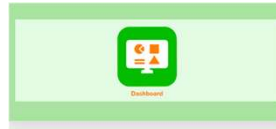
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Landing page

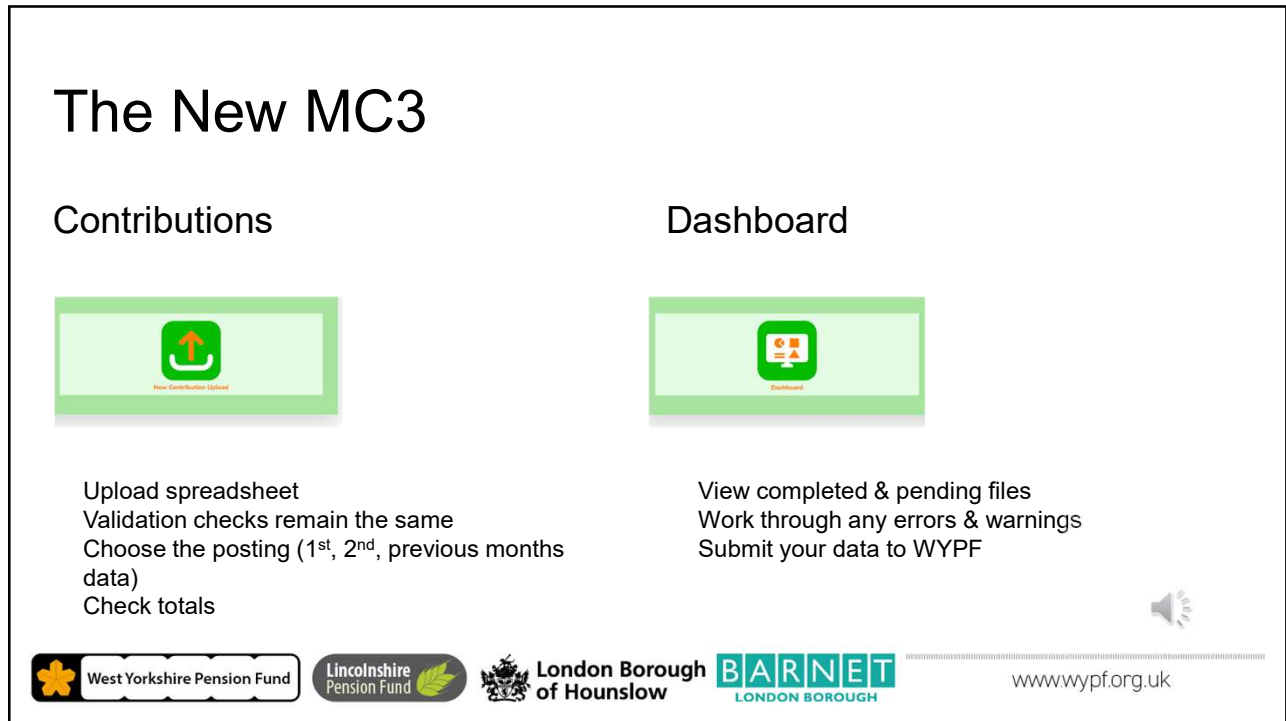Change password

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The New MC3

Contributions

Upload spreadsheet
Validation checks remain the same
Choose the posting (1st, 2nd, previous months data)
Check totals

Dashboard

View completed & pending files
Work through any errors & warnings
Submit your data to WYPF

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Loaded Files

- Total lines on submission
- Total lines matched to persons & folders
- View errors & warnings or exit and return to the view them later through the dashboard

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Dashboard

- Access errors and warnings created from the non-automated allocation of pay and contributions from your return
- Work through the errors first as it may clear some of the warnings
- Errors require you to select where to allocate the pay and contributions by choosing either an existing record or creating a new one
- Warnings will give you the option of either an edit screen where you can provide the missing information or for you to acknowledge the warning individually or in bulk

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Payroll provider: WYPF Test Employer

Status	Description	Total	
Error	Person with same NI number, but not full match found at same employer	4	View
Error	Person with different NI number, but with other matches found at same employer	1	View
Error	More than one folder matches to this contribution record.	1	View
Error	Multiple contribution records in this return matched to this folder.	2	View
Error	Both leaving date and opt out date are present - must be one or the other!	1	View
Error	Leaving date is before join date	1	View
Error	Optout date is before join date.	1	View

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Example of an error at person level with same NI but different surname

Select Folder ref 1086813

Amend your payroll report or submit a record maintenance form

Employer: WYPF Test Employer
Contributions Data Received

Data taken from your monthly return

Forenames	Surname	NI Number	Date of Birth	PostCode	FolderRef	PayLocation	Date Joined	Date Left	PayRef	PostRef	Hours	Job Title
JESSICA	BUNNY	TM110380A	11/03/1980	WC1A 2HH	1086813	WYPF Test Employer	01/12/2015		TOON25		CS 0/37	Cartoon

Potential Matches
Select one option

Data taken from our pension database

Forenames	Surname	NI Number	Date of Birth	PostCode
JESSICA	RABBIT	TM110380A	11/03/1980	WC1A 2HH

Select Folder	FolderRef	PayLocation	Status	Date Joined	Date Left	PayRef
○	1086813	WYPF Test Employer	Active	01/12/2015		TOON25
○	NEWREC	WYPF Test Employer				

Choose a UPM record to match to from the above list. If WYPF's person data differs we will update it to match the contributions.

Confirm that a new person should be created from the contributions data Only available if NI number is not already on file at WYPF.
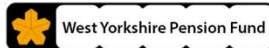
Cancel   Submit

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When?

- The introduction of the new MC3 is being rolled out to all employers on a phased invitation. We suggest you watch this presentation or attend a demonstration of the new submission process before you use the new system

- MC2 will still be available but we encourage employers to make the move to MC3 as soon as it is convenient

- Files have been put through MC3 by the finance business partners so any problems should have been identified and solved prior to employers taking over the process

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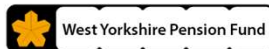
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Why?

- Introduction of the pension dashboard – data is more visible to members therefore increased pressure for data quality

- Have less records created in error

- Ensure correct pay and contributions are allocated to the right record

- Gives you full ownership of correcting errors

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Action required by you

In preparation for the transition we recommend that you…

Obtain a data cleansing report from your finance business partner before your first submission

Correct any mismatching data for fewer errors & warnings

Forename	Nino
Surname	Hours
DOB	Title

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Help available

Watch	Use	FBP Staff	PFR
The presentation of the MC3 – a recording will be made available on our website	The monthly contributions manual as a point of reference	Finance Business Partners are on hand to help	Pension Fund Representatives always available

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