

# i-Connect Online Return Guide

# Supplying employee data manually

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# 1 Introduction

This guide explains how to use i-Connect to send information about Local Government Pension Scheme (LGPS) members in your organisation to your pension fund.

i-Connect is a service that helps to manage the transfer of employee information from payroll administrators to pensions administrators.

You can enter information about your employees into i-Connect using a web browser. i-Connect then automatically identifies and sends information about new joiners, opt-outs and leavers, together with pay and contributions, to the pension fund. In addition, this process fulfils your record-keeping obligations.

AVCs	An employee's additional voluntary contributions paid to the in-house scheme provider
CARE Pay 50/50 Section	An employee's 50/50 section CARE pay
CARE Pay Main Section	An employee's main section CARE pay
Contribution Rate	The rate at which an employee contributes to the pension scheme
Date of Leaving	The date on which an employee left your organisation, or opted out of the pension scheme
EE Year to Date Values	An employee's pension scheme contributions for the year to date (YTD)
EE-APC	An employee's additional pension contributions
Effective Date	The date on which an employee starting to work their current hours or became whole-time
Employee Contributions - 50/50 Section	An employee's 50/50 section pension scheme contributions
Employee Contributions - Main Section	An employee's main section pension scheme contributions
Employer Contributions	The employer's pension scheme contributions, made on behalf of the employee
ER Year to Date Values	The employer's pension scheme contribution for the year to date (YTD)
Full-Time Equivalent Pay	The full time equivalent pensionable pay in respect of the employment for the scheme year, in respect of the 2008 scheme
Opt-Outs	An employee who has opted out of the pension scheme

# **1.1** Explanation of Terms used in this Guide



Other	Employee added years or additional regular contributions for this pay period only
Part-Time Hours	The weekly part-time hours worked by an employee
Pay Period	The recurring length of time over which an employee is paid (e.g., weekly, fortnightly, lunar, monthly)
Pensionable Pay	The total of an employee's salary, wages and any other benefit specified as being pensionable
Reason for Leaving	The reason an employee left
SC-APC	An employer's additional pension contributions under a shared cost arrangement for this pay period only
Status	The employee's membership status in the pension fund
Target System	Your pension fund's pension administration system
Whole-Time Hours	The weekly whole-time hours for the employee's post

### 1.2 Date Input

Dates can be entered using either the date picker ( 🔝 ):

30-04-2018 ×											
	Apr	•	✓ 20 <sup>2</sup>	18	~						
Su	Мо	Tu	We	Th	Fr	Sa					
1	2	3	4	5	6	7					
8	9	10	11	12	13	14					
15	16	17	18	19	20	21					
22	23	24	25	26	27	28					
29	30	1	2	3	4	5					

or in a 'dd-mm-yyyy' format, for example 30-04-2018. Forward slashes are not accepted.

### 1.3 Saving Data

No data will be saved until you click 'Continue' and progress to the next page of the return.

If you start the return part way through the scheme year, and have to amend the year to date values for contributions and pay, the values will revert to the original values if you exit the return before completion or navigate backwards to the 'Employee Contributions & Pay – This Period values' page.

### 1.4 Who to Contact

If you have any questions about using the online return, please contact your pension fund.



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# 2 Dashboard

Immediately after you sign in, the Payroll Dashboard will be displayed:

Payroll Dashboard										
Online Return Online return Submit payroll contributions	Employer Manage employers and payrolls	Reports Generate and view reports	Users Manage users and permissions	History View submission history						

You start the member matching process, described in the next section, from the **Payroll Dashboard**.



# 3 Member Matching

You only need to perform the member matching process once. It creates a 'one-to-one' link between each post on your payroll system and each active record on your fund's target system.

To start member matching, click the 'Online Return' icon:



The following page will be displayed:



From this page, click the 'Request Members' button to display a list of employees to include in the online return submission.

The message 'Online Return member matching successfully started' will be displayed.

1 Online Return member matching successfully started.

The page will refresh automatically after a few minutes and display the list of employees:

0	Online Return - Member Matching											
The following members are all active on your administering authorities target system.												
Tick the relevant checkbox to include the members on your online return.												
Av	Available Members											
	NI Number	Payroll Ref	Surname	Forenames	Date Of Birth	Gender	Payroll Reference 1	Payroll Reference 2	Payroll Reference 3	Job Title	Scheme	Status
☑	JD010125A	134123	Dale	John	06-05-1971	Male	134123			Chief Operations Off	001	Active
☑	WE304580B	134567	Collins	Lewis	31-08-1959	Male	134567			Head of Waste Man	001	Active
V	WM061260D	260D         134447         Lewis         Wendy         08-12-1965         Female         134447         Admin Assistant         001         Active										
>	View Selected	d Members	< Cancel	Member Match	ing							

The table displays information for each of your employees who have records on your fund's target system. Tick the checkbox if you agree each member is active on your payroll.

You can cancel member matching at any time by clicking the 'Cancel Member Matching' button.



## 3.1 Missing Payroll References

Member details will be 'greyed out' to prevent selection if there are any active members with a blank payroll reference. You must contact your fund to ask that they add the correct payroll reference, then click the 'Cancel Member Matching' button to stop the member matching process. You should not resume member matching until your fund has confirmed they have added all missing payroll references.

# 3.2 Completing Member Matching

Click the 'View Selected Members' button to confirm your selection:

Online	Online Return - Confirm Member Selection											
The following members have been selected for inclusion on your online return.												
Click 'Confirm' to complete the member selection process or 'Cancel' to return to the member selection page.												
Selected	Members											
NI Number	Payroll Ref	Surname	Forenames	Date Of Birth	Gender	Payroll Reference 1	Payroll Reference 2	Payroll Reference 3	Job Title	Scheme	Status	
JD010125A	134123	Dale	John	06-05-1971	Male	134123			Chief Operations Off	001	Active	
WE304580B	80B 134567 Collins		Lewis	31-08-1959	Male	134567			Head of Waste Man	001	Active	
WM061260D 134447 Lewis Wendy 07-12-1980				Female	134447			Admin Assistant	001	Active		
> Confirm	Confirm Selected Members											

If you miss any employees you can click 'Cancel Selected Members' to go back to the selection stage.

When all members have been correctly selected, click 'Confirm Selected Members'. The following page will be displayed:





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The screen will refresh after a few moments and the 'Online Return – Synchronisation' page will be displayed:

Online Return - Synchronisation The member data stored in i-Connect requires synchronising with the target system before you can start an online return for the next payroll period. Please press the 'Synchronise Member Data' button below to begin this process. Synchronise Member Data

Click the 'Synchronise Member Data' button to complete the member matching process, the following message will be displayed:

Online Return - Synchronisation

Online Return member synchronisation successfully started.

i-Connect is currently synchronising the member data with the target system.

The facility to submit an online return will be available again shortly.

The 'Online Return – Start' page will be displayed when the synchronisation stage completes.



# 4 Completing Your First Online Return

Click the 'Start Online Return' button to complete your first return. Note that if the i-Connect dashboard is currently displayed you will need to click the 'Online Return' icon to display this page:



Check the 'next expected payroll period end date' to ensure it corresponds with the information you are inputting from your payroll system. Contact your pension fund administrator if the date is incorrect.

- You can use the totals at the bottom of each financial column to check the values match your payroll system.
- If you omit any mandatory information and click 'Continue' to move to the next page, a message will be displayed at the top of the page with details of the row number in error and an error message to help you correct the data. The relevant fields will also be highlighted:

Online	Online Return - Employee Contributions & Pay - This Period values										
Hemb	er #4 :Em	ployee contribution ra	te must be in the range 2	2.75 to 12.50.							
This is a summary of each employees pay and contributions for this pay period.											
If any of the pay and contribution is incorrect for an employee, change the value.											
Click 'Back' to return to the previous page.											
Click 'Continue' to validate and save the pay and contributions information displayed and continue to the next page.											
Payroll Period End Date 30-04-2018											
Employee Contributions & Pay - This Period values											
K Back	> Continue										
				Employe	e Contributions						
NI Number	Payroll Ref	Pensionable Pay	Contribution Rate	Main Section	50/50 Section	Total	Employer Contributions				
JD010125A	134123	1,000.00	5.50	55.00	0.00	55.00	160.00				
NA111333B	134057	1,000.00	5.50	55.00	0.00	55.00	160.00				
WE304580B	134567	1,500.00	5.50	82.50	0.00	82.50	240.00				
WM061260D	134447	1,250.00	55.00	68.75	0.00	68.75	200.00				
Totals		4,750.00		261.25	0.00	261.25	760.00				
Kaus         1,1000         201.25         0.00         201.25         100.00           Kaus         South         Continue         100.00         100.00         100.00											



# 4.1 Employees Page

The first page of the return is the Employees page:

Online Retur	Online Return									
This is a summary of each employee who will be included in the return for this pay period.										
Click the 'Add New Starter' button to add any new employee to the return.										
Click the 'Remove' button to remove any new starter or leaver from the return.										
Click the 'Continue' to go to the contributions and pay page.										
Payroll Period End Date 30-04-2018										
Employees Add New Starter Continue	Employees  Add New Starter  Continue									
NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Action			
JD010125A	134123	Dale	John	Male	06-05-1971	Active				
WE304580B	134567	Collins	Lewis	Male	31-08-1959	Active				
WM061260D	134447	Lewis	Wendy	Female	07-12-1980	Active				
> Continue										

The Employees page lists all the employees you selected when completing the member matching stage. If any new employees have joined your organisation, you can click the 'Add New Starter' button to set them up on i-Connect and your fund's target system (see section 4.1.1).

Otherwise, just click the 'Continue' button to move to the next page of the return.

- Contact your fund if any of the NI Number or payroll references are incorrect.
- Leavers and new starters created in error can be deleted by clicking the 'Remove' button in the 'Action' column.



#### 4.1.1 New Employee Page

If a selected employee is working in one or more posts, each post must be treated separately. Any new or multiple posts should be created as new starters (speak to your fund if you require further guidance).

To add a new employee to the return, simply complete the New Employee form and click 'Save':

Online Return - New Employee									
Please enter the details of	the new employee.								
			Payroll Period E	ind Date	30-04-2018				
New Employee Details	3								
NI Number	NA111333B								
Payroll Reference 1	134057								
Title	Mr 🗸								
Forenames	Barry								
Surname	Proctor								
Date Of Birth	11-07-1960								
Gender	Male 🗸								
Partnership Status	Married 🗸								
Job Title	Payroll Manager								
Date Joined Fund	01-04-2018								
Part Time?									
Part Time Hours									
Whole Time Hours									
Cancel > Save									

You must ensure that the payroll reference is unique when creating a new starter for an employee who already exists on the return. The online return will fail if two or more records are present with the same NI Number and payroll reference.

If the new starter was created by mistake the record can be removed by clicking the 'Remove' button in the 'Action' column:

Employees Add New Starter Continue										
NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Action			
JD010125A	134123	Dale	John	Male	06-05-1971	Active				
NA111333B	134057	Proctor	Barry	Male	11-07-1960	New Starter	> Remove			
WE304580B	134567	Collins	Lewis	Male	31-08-1959	Active				
WM061260D	134447	Lewis	Wendy	Female	07-12-1980	Active				
> Continue										

Click the Continue button to move to the next page.



### 4.2 Employee Contributions & Pay – This Period Values Page

This page is used to input the pay period values for contributions and pensionable pay and will be blank if you are completing the return for the first time.

Complete the fields for each employee and click the 'Continue' button to save and navigate to the next page of the return.

Online	Return	- Employee Co	ontributions &	Pay - This Peri	iod values							
This is a su	mmary of e	ach employees pay and	contributions for this pay	period.								
If any of the	If any of the pay and contribution is incorrect for an employee, change the value.											
Click 'Back' to return to the previous page.												
Click 'Continue' to validate and save the pay and contributions information displayed and continue to the next page.												
	Payroll Period End Date 30-04-2018											
Employee	Contribu	tions & Pay - This Pe	riod values									
Linployee	Contribu	alons ar ay - misre										
< Back	> Continue											
				Employ	ee Contributions							
NI Number	Ref	Pensionable Pay	Contribution Rate	Main Section	50/50 Section	Total	Employer Contributions					
JD010125A	134123	1,000.00	5.50	55.00	0.00	55.00	160.00					
NA111333B	134057	1,000.00	5.50	55.00	0.00	55.00	160.00					
WE304580B	134567	1,500.00	5.50	82.50	0.00	82.50	240.00					
WM061260D	134447	1,250.00	5.50	68.75	0.00	68.75	200.00					
Totals		4,750.00		261.25	.00.00	261.25	760.00					
< Back	> Continue	]										

- Remember to enter zeros in the 50/50 section column if the member is in the main section of the scheme or vice versa.
- You can't enter positive values into both the MAIN and 5050 contribution columns in the same pay period.
- When you complete the next pay period's online return, the previous month's values are carried forward, meaning you only need to change the pay and contributions for any employee whose values have changed.
- Don't forget the data will not be saved until you click 'Continue'!



# 4.3 Employee Contributions & Pay – Year to Date Values Page

This page is used to input the Year to Date (YTD) values for pensionable pay and contributions for the current scheme year. The scheme year runs from 1 April to 31 March.

The pay period values from the previous page are carried forward to prepopulate the page. You must overwrite these values with the correct YTD amounts if you start using i-Connect part-way through the scheme year.

Online	Online Return - Employee Contributions & Pay - Year to Date values									
0 Online	Online Return employee information successfully saved.									
This is a su	This is a summary of each employees pay and contributions for the year to date.									
If any of the	If any of the pay and contributions values for the year to date are incorrect for the employee, change the value.									
Click 'Back'	to return t	o the pre	vious pa	age.						
Click 'Conti	nue' to vali	date and	save th	e pay a	and contributions	information displ	ayed and continu	e to the next page	ł.	
							Payro	II Period End Date		30-04-2018
Employee	Contrib	utions &	≩Pay-	Year t	o Date values					
< Back	> Continue	AL .								
		This Pa	y Period	Totals		Year to Date Totals	5	CARE	E Pay	
NI Number	Payroll Ref	EE Main	EE 50/50	ER	EE Main	EE 50/50	ER	Main Section	50/50 Section	Full Time Equivalent Pay
JD010125A	134123	55.00	0.00	160.00	55.00	0.00	160.00	1,000.00	0.00	12,000.00
NA111333B	134057	55.00	0.00	160.00	55.00	0.00	160.00	1,000.00	0.00	12,000.00
WE304580B	134567	82.50	0.00	240.00	82.50	0.00	240.00	1,500.00	0.00	18,000.00
WM061260D	134447	68.75	0.00	200.00	68.75	0.00	200.00	1,250.00	0.00	24,000.00
Totals		261.25	0.00	760.00	261.25	0.00	760.00	4,750.00	0.00	66,000.00
< Back	Continue         Continue									

Full-time equivalent pay is required for all employees who were in the LGPS before 1 April 2014 (1 April 2015 for Scottish employers).

Click the 'Continue' button to save and navigate to the next page of the return.

- On subsequent returns, i-Connect uses the YTD values and the This Pay Period figures to calculate the YTD values for the current month. Changing these values is necessary only if the YTD value calculated by i-Connect are different from your payroll values.
- If you amend the YTD values for contributions and pay, the values will revert to the original values if you exit the return before completion or navigate backwards to the 'Employee Contributions & Pay – This Period values' page.



### 4.4 Employee Additional Contributions Page

This page is used to input any of the following additional contributions your employees are paying into the Local Government Pension Scheme:

- AVCs any additional voluntary contributions to the in-house scheme provider
- Add Conts/ARCs any Added Years or Additional Regular Contributions (ARCs)
- EE-APC any employee-only Additional Pension Contributions (APCs)
- SC-APC any shared-cost Additional Pension Contributions (APCs)

Online	Online Return - Employee Additional Contributions									
0 Online	Online Return employee information successfully saved.									
This is a su	This is a summary of each employee's additional contributions for this pay period.									
If any of the	If any of the additional contributions are incorrect for an employee, change the value.									
Click 'Back'	to return to	the previous page.								
Click 'Conti	Click 'Continue' to validate and save the additional contributions information displayed and continue to the next page.									
					Payroll Period End	Date	30-04-2018			
Employee	Addition	al Contributions								
< Back	> Continue	1								
		This Pa	y Period		This Financi	al Tax Year				
NI Number	Payroll Ref	EE-APC	SC-APC	AVCs	Add Conts/ARCs	EE-APC	SC-APC			
JD010125A	134123	60.00	120.00	0.00	0.00	60.00	120.00			
NA111333B	134057	0.00	0.00	0.00	0.00	0.00	0.00			
WE304580B	134567	0.00	0.00	15.10	0.00	0.00	0.00			
WM061260D	134447	0.00	0.00	0.00	0.00	0.00	0.00			
Totals		60.00	120.00	15.10	0.00	60.00	120.00			
< Back	> Continue	]								

Enter the YTD additional contributions the employee has paid during this pay period into the relevant field.

Click the 'Continue' button to save and navigate to the next page of the return.

- 'This Pay Period' values are only required for EE-APC and SC-APC contributions.
- 'This Financial Tax Year' totals need to be updated each pay period.



# 4.5 Employee Service Page

We use this page to inform the fund of changes to employees' working hours, for example, a part-time employee who moves to whole-time working or vice versa; or a part-time employee who changes their contractual hours:

Online Re	eturn - En	nployee Se	ervice							
0 Online Re	0 Online Return employee information successfully saved.									
This is a summ hours.	This is a summary of each employees whole-time / part-time status, with the effective date they became whole-time or started working those part-time hours.									
If an employee	has changed th	eir part-time hou	irs, amend the effectiv	ve date and ente	er their new part-time / whole-time	e hours.				
To make an em	ployee whole-ti	me, enter the eff	fective date they beca	me whole-time	and remove the part-time and wh	nole-time hours.				
If the employee	is term-time ar	d does not work	52 weeks of the year	adjust part-time	hours.					
Click 'Back' to r	eturn to the pre	vious page.								
Click 'Continue'	to validate and	save the additio	nal contributions info	rmation displaye	d and continue to the next page.					
					Payroll Period End Date	30-04-2018				
Employee Se	rvice									
K Back	Continue									
NI Number	Payroll Ref	Part Time?	Effective Date		Part Time Hours	Whole Time Hours				
JD010125A	134123		01-04-2018		20.00	37.00				
NA111333B	134057		01-04-2018							
WE304580B	134567		01-09-2010							
WM061260D	134447		01-05-2010		10.00	37.00				
K Back	Continue									

If an employee is part-time, tick the 'Part Time?' checkbox, enter the date of change in the 'Effective Date' field and, finally, enter the new part-time and whole-time contractual hours in the fields provided.

If the member is whole-time, simply enter an effective date and leave the 'Part-Time Hours' and 'Whole-Time Hours' fields blank.

Click the 'Continue' button to save and navigate to the next page of the return.

#### **Useful Information**

• If the employee works during term time only, and not 52 weeks of the year, an adjustment must be made to their 'Part-Time Hours' value. For example, an employee working 32 hours a week, for only 44 weeks a year, must have their part-time hours calculated as follows:

32/52 x 44 = 27.08/37.00



# 4.6 Employee Personal Details Page

This page shows a summary of all employees on the online return:

Online R	Online Return - Employee Personal Details									
This is a sumn	This is a summary of each employees personal details.									
To change any of their personal details click on the 'Edit' Button.										
Click 'Back' to return to the previous page.										
Click 'Continue	e' to continue to	the ne	xt page.							
							Payroll Period End Date	30-04	i-2018	
Employee P	Employee Personal Details									
< Back >	Continue									
NI Number	Payroll Ref	Title	Forenames	Surname	Date Of Birth	Gender	Partnership Status	Job Title	Action	
JD010125A	134123	Dr	John	Dale	06-05-1971	Male	Married	Chief Operations Off	> Edit	
NA111333B	134057	Mr	Barry	Proctor	11-07-1960	Male	Married	Payroll Manager	> Edit	
WE304580B	134567	Prof	Lewis	Collins	31-08-1959	Male	Married	Head of Waste Man	> Edit	
WM061260D	134447	Mrs	Wendy	Lewis	07-12-1980	Female	Married	Admin Assistant	> Edit	
< Back >	Continue									

Click the 'Edit' button if you need to change the personal details of an employee, the 'Edit Employee Personal Details' page will be displayed:

Online Return	- Edit Employ	ee Person	al Details	
Please enter the emplo	yee's new personal det	ails.		
Employee Personal	Details			
NI Number	JD010125A			
Payroll Ref	134123			
Title	Dr	~		
Forenames	John			
Surname	Dale			
Date Of Birth	06-05-1971			
Gender	Male	~		
Partnership Status	Married	~		
Job Title	Chief Operations Off			
Cancel Save				

Change the relevant information, and click 'Save' to save the changes and return to the summary page.

Click the 'Continue' button to save and navigate to the next page of the return.



# 4.7 Employee Contact Details Page

This page shows a summary of the contact details of all employees on the online return:

Online Re	eturn - Em	ployee (	Contact Details	5					
This is a summ	This is a summary of each employees contact details.								
To change any	To change any of their contact details click on the 'Edit' Button.								
Click 'Back' to r	Click 'Back' to return to the previous page.								
Click 'Continue'	Click 'Continue' to continue to the next page.								
					Payroll Period End Date	3	0-04-2018		
Employee Co	mployee Contact Details								
K Back	Continue								
NI Number	Payroll Ref	Surname	Address	Email Address	Telephone Number	Mobile Number	Action		
JD010125A	134123	Dale	13 Bloomsbury Lane Timperley				> Edit		
NA111333B	134057	Proctor					> Edit		
WE304580B	134567	Collins	23 Upper Riverbank Bagillt				> Edit		
WM061260D	134447	Lewis	23 Upper Riverbank Bagillt				> Edit		
K Back	Continue				·				

Click the Edit button to change an employee's postal, email address and telephone number. The Edit Employee Contact Details page is displayed:

Online Return -	- Edit Employee Contact Details
Please enter the employe	ee's new contact details.
Employee Contact De	etails
NI Number	NA111333B
Payroll Ref	134057
Surname	Proctor
Address Line 1	10 Springwell Gardens
Address Line 2	Choriton-Cum-Hardy
Address Line 3	Manchester
Address Line 4	
Address Line 5	
Postcode	M21 2RR
Email Address	barry.proctor@heywood.gov.uk
Telephone Number	0161 233 1234
Mobile Number	07888 555 555
Cancel Save	

Amend or enter the relevant information, and click 'Save' to save the changes and return to the summary page.

Click the 'Continue' button to save and navigate to the next page of the return.



# 4.8 Employee Leavers & Opt Outs Page

This page is used to inform the fund of any employees who have left your employment or have opted out of the LGPS:

Online Ret	urn - Emp	loyee Leavers &	Opt Outs						
This is a summar	y of each employ	ee who will be included in th	e return for this pay period, including the	ose who have already left.					
To tell the pension	To tell the pension team about new leaver enter the date they left employment or opted out of the fund.								
For leavers, enter	For leavers, enter a reason for leaving. For opt outs, tick the 'Are they opting out?' box.								
Click 'Back' to ret	Click 'Back' to return to the previous page.								
Click 'Continue' to	continue to the	next page.							
	Payroll Period End Date 30-04-2018								
Employee Leav	vers & Opt Out	S							
NI Number Payr	oll Ref Surname	Date Left Scheme	Reason		Are they opting out?				
JD010125A 13412	23 Dale	30-04-2018	Reason 1st Tier III Health						
NA111333B 13405	57 Proctor		2nd Tier III Health 3rd Tier III Health Age 55 - NPA Full Reduction Waiver						
WE304580B 13456	67 Collins	22-04-2018	Age 55 - NPA Partial Reduction Waiver Age 55 - No Waiver Death in Service		✓				
WM061260D 13444	47 Lewis		Dismissal Efficiency of Service						
K Back Co	ntinue		riesune Retirment Normal Retirment Resignation Following Maternity Leave TUPE Transfer Voluntary Resignation						

To process a leaver, enter the date they left your organisation in the 'Date Left Scheme' field and a reason for leaving in the 'Reason' field.

The 'Reason' field will either be a free format text box, allowing up to 100 characters of free format text or a drop-down box, as per the example above.

To process an opt out, enter the date they opted out of the LGPS in the 'Date Left Scheme' field and tick the 'Are they opting out?' tick box.

Click the 'Continue' button to save and navigate to the final page of the return.

- Do not complete the 'Reason field' for employees who opt out of the LGPS.
- You can remove leavers from the return when you process the next pay period (see section 4.1), but your fund may ask you to keep them on the return until the end of the scheme year.
- If your fund has asked you to keep leavers on the return until the end of the scheme year, you must enter zeros on the 'Employee Contributions & Pay – This Period values' page (the pay period after the member has left), to prevent the previous pay period values being added to the cumulative totals.



# 4.9 Completing the Return

The 'Completion' page is the final page of the online return:



You have three options to choose from:

- Back step back through each page of the online return.
- **Cancel** remove all data entered for this payroll period and cancel the return. This option cannot be reversed.
- **Complete** complete the return and proceed to the 'Latest Upload' page.

When you select 'Complete', you are confirming that you have submitted all the payroll information into i-Connect for the pay period. The following page will be displayed:

Latest Upload
Online Return successfully submitted.
Your payroll data is now being processed and this page will refresh shortly.
A list of detected events will be available when this stage is complete.
You must select the 'Proceed' button to update your administering authorities target system with the detected events or select 'Cancel' if you need to resubmit the data.

Please note that no data will be sent to your pension fund's target system until you click 'Proceed' on the 'Latest Upload' page. See section 4.11 for further details.

#### **Useful Information**

 If you have amended the year to date values for contributions and pay, the values will revert to the original values if you navigate backwards to the 'Employee Contributions & Pay – This Period values' page.



# 4.10 Latest Upload (Events Summary) Page

This page appears when the online return processing has completed and i-Connect has identified all the changes that need to be applied to your fund's target system (this may take several minutes):

File Name	Period End Date	E	xpecte	d Submission Dat	te	Submission Da	ate	Submission Ty	ре	Status
online return 3	30-04-2018	3	0-04-20 <sup>-</sup>	18		12-07-2018 11:08	3:42	Payroll Upload		Pending
Submission Statistic	s									
Total Number of Payrol Omitted Payroll Membe	I Members Tracked by i rs (present on a previou	Connect	ion, and	I no leaver event pro	cessed)				4 0	
Payroll Members subm	itted this period		4	Payroll Members in	Error	(	Accepte	d for Processing		
Pensionable Pay (Perio	d)	£4,750.	00	Employee Main Con	tributions (Period)	£261.25	5 AVCs ()	(TD)		£15.
Main CARE Pay (YTD)		£4,750.	00	Employee Main Con	tributions (YTD)	£261.25	5 Add Co	nts/ARCs (YTD)		£0.
50/50 CARE Pay (YTD)	)	£0.	00	Employee 50/50 Co	ntributions (Period)	£0.00	) Shared	Cost APCs (Period)		£120.
				Employee 50/50 Co	ntributions (YTD)	£0.00	) Shared	Cost APCs (YTD)		£120
				Employer Contributions (Period)		£760.00	Employ	e APCs (Period)		£60.
				Employer Contribute	ons (TTD)	£700.00	Employ	e APOS (TTD)		2.00
Submitted By User				empflake		Processed By Use	r			
Events	Total	Pendi	ng	Submitted	Completed	Failures	Errors	Suppressed	Progress	
New Starter	1	1		0	0	0	0	0		
Opt In	0	0		0	0	0	0	0		
Salary	4	4		0	0	0	0	0		
Contributions	4	4		0	0	0	0	0		
Additional Contribution	ns 2	2		0	0	0	0	0		
CARE Pay	4	4		0	0	0	0	0		
Service	0	0		0	0	0	0	0		
Service Break	0	0		0	0	0	0	0		
Member Details Update	9 1	1		0	0	0	0	0		
Member Address Upda	ite 1	1		0	0	0	0	0		
Works Address Update	0	0		0	0	0	0	0		
Opt Out	1	1		0	0	0	0	0		
Leaver	1	1		0	0	0	0	0		



# 4.11 Sending Data to the Fund

To send the data to the fund click the 'Proceed' button, or click 'Cancel' to cancel the upload process.

When you click 'Proceed', the upload status changes from 'Pending' to 'Submitted', indicating that i Connect has commenced event processing. The progress bars fill to indicate the progress of the upload, and the totals change to display the number of pending, submitted and completed events. Any failures or error totals are also updated:

Recent Act	tivities									
File Name	Period End	Date	Expecte	d Submission Date	e	Submission Date		Submission Type		Status
online return	30-04-2018		30-04-20	8		12-07-2018 11:08:42		Payroll Upload		Complete
Submission Statist	tics									
Total Number of Pay Omitted Payroll Mem	rroll Members Tr	racked by i-C n a previous	connect submission, an	d no leaver event proc	cessed)				4 0	
Payroll Members submitted this period			4	Payroll Members in	Error		0 Accepte	ed for Processing		4
Pensionable Pay (Pe	eriod)		£4,750.00	Employee Main Con	tributions (Period)	£261.2	5 AVCs (	YTD)		£15.10
Main CARE Pay (YT	D)		£4,750.00	Employee Main Con	tributions (YTD)	£261.2	5 Add Co	nts/ARCs (YTD)		£0.00
50/50 CARE Pay (Y1	TD)		£0.00	Employee 50/50 Col	ntributions (Period)	£0.0	0 Shared	Cost APCs (Period)		£120.00
				Employee Sorot Col	ons (Period)	£0.0	0 Employ	ee APCs (Period)		£60.00
				Employer Contributions (YTD)		£760.00 Employe		ee APCs (YTD)		£60.00
Submitted By User				empflake		Processed By Use	er		empflake	
Events		Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress	
New Starter		1	0	0	1	0	0	0		
Opt In		0	0	0	0	0	0	0		
Salary		4	0	0	4	0	0	0		
Contributions		4	0	0	4	0	0	0		
Additional Contribut	tions	2	0	0	2	0	0	0		
CARE Pay		4	0	0	4	0	0	0		
Service		0	0	0	0	0	0	0		
Service Break		0	0	0	0	0	0	0		
Member Details Upd	late	1	0	0	1	0	0	0		
Member Address Up	odate	1	0	0	1	0	0	0		
Works Address Updat	te	0	0	0	0	0	0	0		
Opt Out		1	0	0	1	0	0	0		
Leaver		1	0	0	1	0	0	0		

The upload process can take several minutes to complete, depending on how busy the i-Connect service is.

If the submission of the data has not finished within five minutes, you can log out. Processing will continue in the background, and i-Connect will send you an email when all the data has been sent to the pension fund.



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When you receive this email, you must log into i-Connect to ensure all events have been processed correctly and that the status of the online return submission has changed from 'Submitted' to 'Complete'. If the status is still displayed as 'Submitted', or is reported as 'Internal Error', please contact your pension fund.



# 5 Want to Know More?

Look at these guides:

- i-Connect Login Guide
- i-Connect File Upload Guide
- i-Connect Onboarding Guide
- i-Connect Reporting Guide







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