# Shropshire County Pension Fund

# Supplementary guide for iConnect online returns

## SHROPSHIRE COUNTY PENSION FUND

### Supplementary guide for iConnect online returns

This guide is to be used in **addition** to the main guide published by iConnect.  It will set out some of the local arrangements in order to comply with the Shropshire Pension Fund Administration Strategy.

**General points to note:**

*Online returns should be completed on or before the day the payment is due to reach the bank account of Shropshire County Pension Fund or, if paying by cheque, at the time of posting the payment.*

*Payment must be made by the 19th of the month following the deduction from pay.*

Any post number changes should be treated as a leaver from the old post number and a new starter created for the new post number.

Full Time Equivalent pay (FTE pay) can be provided monthly but should be provided for all members on the March upload.

All casual/timesheet staff should have their hours averaged for the year at month 12 and input on the March upload.

Please *do not* click refresh or the continue/back buttons if iConnect freezes at any stage of the monthly upload as this can cause iConnect to fail. Click the iConnect logo which should take you back to the dashboard, if this doesn't happen please close the browser and try again. If you are still unable to upload data please contact Shropshire County Pension Fund (see below).

**Dashboard – page 6 of the iConnect User Guide**

In order for you to use the system some preliminary work will be undertaken by Shropshire County Pension Fund to ensure you are set up.  When you first log in you will see the "dashboard" if you do not see this please contact Shropshire County Pension Fund.

**Member matching – page 7-9 of the iConnect User Guide**

Member matching will be processed by Shropshire County Pension Fund before your first return is submitted.

**Employees page – page 11 of the iConnect user guide**

This page lists all of members of the pension scheme for your employer. If a member has been made a leaver they will have a 'Remove' button next to their name, when you next submit a return. There are two options regarding removing leavers from the online return:

**Option 1:**

Remove the member from the online return on the next return. This will remove the member completely from the iConnect system so the members year to date (YTD) figures will be removed from the iConnect dashboard. If you decide to remove the leavers at this stage you will need to record the YTD figures separately so they can be added to the iConnect totals at year end.

**Option 2:**

Keep the leavers on the iConnect file for the financial year. The monthly figures for the member would need to be zero but the YTD figures can remain. This will mean that the YTD figures will remain on the iConnect dashboard and won't have to be recorded separately for year end. The leavers can then be removed in the April return ready for the new year.

**If you require help with what to do with leavers, or more information on the two options above please contact Shropshire County Pension Fund.**

**New Employee – page 12 of the iConnect User Guide**

If a member is working in more than one post then each post must be treated separately and have a unique identifier (post number). Please set up the second post as a new starter.

- Payroll reference 1 = Post number. If the member does not have a post number (but essential if multiple posts) please copy the payroll number into this field. *Important – The post number should all be in Upper Case. If there is no post number please copy the payroll number into this field.*
- Payroll reference 2 = Payroll number. *Important – The payroll number should all be in Upper Case.*

If a member changes post number then the new post number will need to be set up as a new starter and the old post made a leaver.

Please note that once an online return has been uploaded any new starters cannot be removed from the pension system via iConnect. If a new starter has been created in error please contact Shropshire County Pension Fund (see below).

**Employee Contributions and Pay – this Pay Period – page 13 of the iConnect User Guide**

The figures on this screen are pre-populated based on the figures entered the previous month.

Please check the total at the bottom of this screen to make sure the pay and contributions are correct and match the payment you are making.

If a member has left and has received no pay for the month then the figures need to be zero. Please see Employees page and the two options above.

**Employee Contributions and Pay – Year to Date values – page 14 of the iConnect User Guide**

Please double check the year to date figures are correct on the March return as these will be used for the year end process and cannot be amended through iConnect.

Please check the total at the bottom of this screen to make sure the pay and contributions are correct and match the year to date figures on your payroll system.

You will be expected to submit the usual year end reconciliation form giving the totals paid for the year and the totals deducted from payroll.  These forms will be sent to you separately near the financial year end.

**Employee Additional Contributions – page 15 of the iConnect User Guide**

Please double check the Additional Contributions figures are correct on the March return as these will be used for the year end process and cannot be amended through iConnect.

Please check the total at the bottom of this screen to make sure the pay and contributions are correct and match the year to date figures on your payroll system.

**Employee Service – page 16 of the iConnect User Guide**

If an employee does not work a full year 52 weeks of the year (term time), then the part time hours will need to be proportioned for a full year. Please see the example below:

Employee works 18 hours a week for 44 weeks per year:

We would need to multiply the hours by the weeks per year, then divide that figure by 52.14.

18 x 44 / 52.14 = 15.19/37.00

If you are unsure please contact Shropshire County Pension Fund (see below).

Hours can be amended for any period of the year not just the month being uploaded.

**Employee Personal Details – page 17 of the iConnect User Guide**

If an employee's surname changes we will need to see a certified copy of the certificate e.g. marriage certificate. The certified copy can be scanned and sent to pensions@shropshire.gov.uk

**Employee Contact Details – page 18 of the iConnect User Guide**

Please **_do not_** amend any email addresses or add any email addresses to member records. Shropshire County Pension Fund currently collect email addresses from members **_only_**.

**Employee Leavers and Opt Outs – page 19 of the iConnect User Guide**

If a member changes post number then the new post number will need to be set up as a new starter and the old post made a leaver.

Please put in the reason field the same reason for leaving code you will put on the leaver form.

If however, the employer deems the change of post to be a change in employment, you will also need to issue a leavers form so that the correct options can be given to the employee.

When an employee leaves your organisation you will also need to issue a form to the Fund.  This is a PEN007 and can be found on our website in the employer area.  If you are unsure where to find this please contact us at pensions@shropshire.gov.uk

Please see the notes on Employee page above on how to deal with leavers on the return.

**Latest Upload Events Summary Page – page 21 of the iConnect User Guide**

Please **_check all the totals_** on the dashboard to make sure the figures are correct and match your payment made to Shropshire County Pension Fund.

Check the events totals to make sure everything you have input has been included e.g. any new starters, leavers.

There are various tolerance checks performed on the data uploaded to iConnect. There are three main validation checks, these are:

- Employee Contributions
- Pensionable Pay

- Payroll Members
- New Starters

Shropshire County Pension Fund will set these tolerances at 10% for Employee Contributions and Pensionable Pay. iConnect will check these figures on the current upload against the previous months upload and highlight any differences greater than 10%.

The tolerance for Payroll Members and New Starters will be set dependant on the number of employees you have.

If the tolerances need to be changed please contact Shropshire County Pension Fund to discuss and make the changes if needed. **Please do not amend any tolerances yourself, always contact Shropshire County Pension Fund.**

Any tolerance failures will be shown in a yellow bar below the totals on the dashboard. You will need to check to make sure the figures are correct, if they are you will be asked to confirm this once you click proceed.

**Contact Details for Shropshire Pension Fund**

iConnect queries:      Gareth Williams

                       Tel: 01743 281027

                       Email: Gareth.Williams@shropshire.gov.uk


Other queries:         01743 252130

                       pensions@shropshire.gov.uk

Website:               Shropshirecountypensionfund@shropshire.gov.uk

## Important

**Users on iConnect**

You will be set up with one user on the iConnect system but you can request a second user if required. We strongly recommend that more than one user is set up to ensure you always have someone who is able to submit the data.  The data must be submitted to the Fund by 19th of the month following deductions from pay in line with the payment deadline.  Failure to submit on time will result in a breach of time limits so will be recorded as such in line with the Fund's breaches policy.

It is your responsibility as the employer to notify Shropshire County Pension Fund of any changes to iConnect users due to staff leaving or change of users.

**Please do not set up any new i-Connect users yourself. New users are controlled by Shropshire County Pension Fund, as certain options need to be selected and audit checked.**