

i-Connect Online Return Guide

Uploading your employee data
manually v5



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Revision History

Vsn	Date	Updated By	Approved By	Details of Amendment
1.10	18/10/2016	P Stocks	C Lewis	First release
2.00	13/06/2018	K Pridgeon	J Dale/E Fisher	Rebrand
2.01	12/07/2018	J Dale	C Lewis	Updated with rebranded images
2.02	01/07/2019	J Dale	C Lewis	Address change
4.00	28/05/2020	J Dale	C Lewis	Hudson release update
5.00	09/02/2024	C Lewis	I Baker	Rebrand and Update to Wye Release



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.


Explanation of Terms used in this Guide

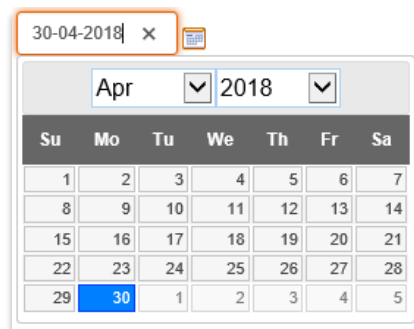
Term	Description
AVCs	An employee's additional voluntary contributions paid to the in-house scheme provider
CARE Pay 50/50 Section	An employee's 50/50 section CARE pay
CARE Pay Main Section	An employee's main section CARE pay
Contribution Rate	The rate at which an employee contributes to the pension 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
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

Date Input

Dates can be entered using either the date picker button  or in a 'dd-mm-yyyy' format, for example 30-04-2018. Forward slashes are not accepted.



Date picker

Saving Data

Select the **Continue** button and progress to the next page of the return to save the data. The data will not be saved until you do this.

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.

Who to Contact

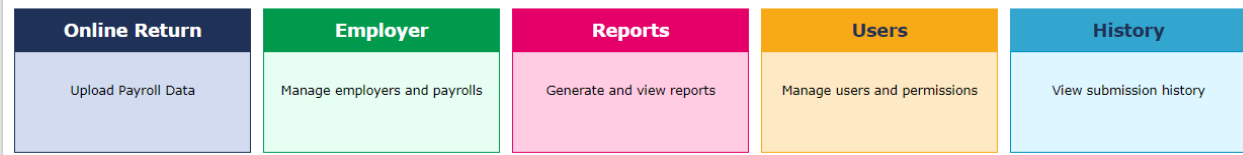
If you have any questions about using the online return, please contact your pension fund.

Dashboard

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



Payroll Dashboard



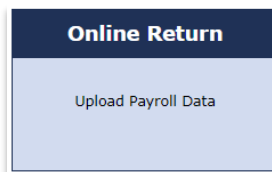
Payroll Dashboard

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

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, select the **Online Return** icon.



Online Return icon

The **Online Return – Member Matching** page will be displayed.

Online Return - Member Matching

You need to identify the target system members who are active on your payroll before submitting your online return. Click the button below to generate a list of available members.

Request Members

Online Return – Member Matching page

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

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



Online Return - Member Matching success message



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

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.

Available Members

Select	NI Number	Payroll Ref	Surname	Forenames	Date Of Birth	Gender	Payroll Reference 1	Payroll Reference 2	Payroll Reference 3	Job Title	Scheme	Status
<input checked="" type="checkbox"/>	AL000001A	920002	Mathis	Arthur	04-05-1965	Male	920002	3004622		Accountant	001	Active
<input checked="" type="checkbox"/>	AL000002A	45813	Jay	Peggy	03-01-1961	Female	45813	M06 310149		Senior Manager	001	Active
<input checked="" type="checkbox"/>	AL000003A	920003	Dale	Georges	06-05-1971	Male	920003	3004633		Accountant	001	Active

[View Selected Members](#)

[Cancel Member Matching](#)

Online Return – Member Matching page

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 selecting the **Cancel Member Matching** button.

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 select 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.

Completing Member Matching

Select the **View Selected Members** button to confirm your selection.

If you miss any employees, you can select the **Cancel Selected Members** button to go back to the selection stage.

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
AL000001A	920002	Mathis	Arthur	04-05-1965	Male	920002	3004622		Accountant	001	Active
AL000002A	45813	Jay	Peggy	03-01-1961	Female	45813	M06 310149		Senior Manager	001	Active
AL000003A	920003	Dale	Georges	06-05-1971	Male	920003	3004633		Accountant	001	Active

[Confirm Selected Members](#)

[Cancel Selected Members](#)

Online Return – Confirm Member Selection page



When all members have been correctly selected, select the **Confirm Selected Members** button. The **Online Return member matching successfully confirmed** message will be displayed.

Online Return - Member Matching

✓ Online Return member matching successfully confirmed.

i-Connect is currently confirming the selected member data for the online return.

When this process is complete, this page will redirect to the online return submission page. Please try again later.

Online Return – Member Matching success message

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

Online Return – Synchronisation page

Select the **Synchronise Member Data** button to complete the member matching process. A message stating that the synchronisation has been successfully started 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.

Online Return – Synchronisation success message

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



Completing Your First Online Return

Select the **Start Online Return** button to complete your first return. Note that if the i-Connect dashboard is currently displayed, you will need to select the Online Return icon to display this page.

Online Return - Start

The next expected payroll period end date for an online return is: **30-04-2023**

Please press the 'Start' button below to begin this process.

Start Online Return

Online Return – Start 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.

Useful Information

- You can use the totals at the bottom of each financial column to check the values match your payroll system.
- If you select the **Continue** button and have not entered mandatory information, a message will be displayed at the top of the page. The message displays details of the row numbers with invalid or missing information and the relevant fields will be highlighted on the page.

Online Return - New Employee

! Date of Birth is invalid; should be a valid date and in format dd-MM-yyyy.
Date Joined Fund is mandatory.

Please enter the details of the new employee. Payroll Period End Date 31-12-2023

New Employee Details

NI Number	<input type="text" value="WE203145B"/>
Payroll Reference 1	<input type="text" value="1340537"/>
Payroll Reference 2	<input type="text" value="2323"/>
Title	<input type="text" value="Miss"/>
Forenames	<input type="text" value="Bronte"/>
Surname	<input type="text" value="Harrison"/>
Date Of Birth	! 06-12-1998
Gender	<input type="text" value="Female"/>
Partnership Status	<input type="text" value="Single"/>
Job Title	<input type="text" value="Admin Asst"/>
Date Joined Fund	!
Part Time?	<input type="text"/>
Part Time Hours	<input type="text"/>
Whole Time Hours	<input type="text"/>

Cancel
Save

Online Return – New Employee page

Employees Page

The first page of the return is the **Employees** page. By default, the page is displayed in National Insurance (NI) number order, but the fund can set the page to be ordered by Surname or Payroll Reference if this would be better for you.

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.

Employees

Payroll Period End Date 31-12-2023

NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Actions
JH229031D	[22976] [M01 306970]	Bishop	Daphne	Female	08-12-1983	Active	
JH357401A	[920006311] [1342576]	Boyce	Billie	Female	19-05-1980	Active	
JJ316504A	[920006284] [1061844]	Bowles	Kaja	Female	27-07-1986	Active	
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah	Male	07-01-1994	Active	
PT000019C	[HUN82645] [BB33264]	Block	Andreas	Male	11-09-1954	Active	
SL043242A	[3296] [3296]	Beck	Arif	Male	28-04-1969	Active	
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	Female	27-07-1959	Active	
WM389457D	[3441026] [1274155]	Bloom	Amirah	Female	26-11-1961	Active	
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	Male	07-04-1948	Active	
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	Female	08-08-1948	Active	

Online Return – Employees page

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 select the **Add New Starter** button to set them up on i-Connect and your fund's target system.

Otherwise, select the **Continue** button to move to the next page of the return.

Useful Information

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

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, complete the **New Employee** form and select the **Save** button.

Online Return - New Employee

Please enter the details of the new employee.

Payroll Period End Date 31-12-2023

New Employee Details

NI Number	<input type="text" value="AB341256D"/>
Payroll Reference 1	<input type="text" value="1340547"/>
Payroll Reference 2	<input type="text" value="2323"/>
Title	<input type="text" value="Miss"/>
Forenames	<input type="text" value="Bronte"/>
Surname	<input type="text" value="Harrison"/>
Date Of Birth	<input type="text" value="06-12-1998"/>
Gender	<input type="text" value="Female"/>
Partnership Status	<input type="text" value="Single"/>
Job Title	<input type="text" value="Democratic Services"/>
Date Joined Fund	<input type="text" value="01-12-2023"/>
Part Time?	<input type="text"/>
Part Time Hours	<input type="text"/>
Whole Time Hours	<input type="text"/>

Online Return – New Employee page

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 selecting the **Remove** button in the **Action** column.

Employees

Payroll Period End Date 31-12-2023

NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Actions
AB341256D	[1340547] [2323]	Harrison	Bronte	Female	06-12-1998	New Starter	<input type="button" value="Edit"/> <input type="button" value="Remove"/>
JH229031D	[22976] [M01 306970]	Bishop	Daphne	Female	08-12-1983	Active	
JH357401A	[920006311] [1342576]	Boyce	Billie	Female	19-05-1980	Active	
JJ316504A	[920006284] [1061844]	Bowles	Kaja	Female	27-07-1986	Active	
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah	Male	07-01-1994	Active	
PT000019C	[HUN82645] [BB33264]	Block	Andreas	Male	11-09-1954	Active	
SLO43242A	[3296] [3296]	Beck	Arif	Male	28-04-1969	Active	
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	Female	27-07-1959	Active	
WM389457D	[3441026] [1274155]	Bloom	Amirah	Female	26-11-1961	Active	
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	Male	07-04-1948	Active	
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	Female	08-08-1948	Active	

Online Return – Employees page

Select the **Continue** button to move to the next page.

Employee Contributions & Pay – This Period 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 select the **Continue** button to save and navigate to the next page of the return.

Online Return - Employee Pay & Contributions - This Period

This is a summary of each employee's pay and contributions for this pay period.

If any of the pay and contributions values are incorrect for the 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.

Employee Pay & Contributions - This Period Payroll Period End Date 31-12-2023

[Back](#) [Continue](#)

NI Number	Payroll Ref	Surname	Forenames	Pensionable Pay	Contribution Rate	Employee Contributions		Employer Contributions
						Main Section	50/50 Section	
JH229031D	[22976] [M01 306970]	Bishop	Daphne	1,000.00	5.00	500.00	0.00	150.00
JH357401A	[920006311] [1342576]	Boyce	Billie	1,000.00	5.00	500.00	0.00	150.00
JJ316504A	[920006284] [1061844]	Bowles	Kaja	1,000.00	5.00	500.00	0.00	150.00
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah	1,000.00	5.00	500.00	0.00	150.00
PT000019C	[HUN82645] [BB33264]	Block	Andreas	1,000.00	5.00	500.00	0.00	150.00
SL043242A	[3296] [3296]	Beck	Arif	1,000.00	5.00	500.00	0.00	150.00
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	1,000.00	5.00	500.00	0.00	150.00
WM389457D	[3441026] [1274155]	Bloom	Amirah	1,000.00	5.00	500.00	0.00	150.00
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	1,000.00	5.00	500.00	0.00	150.00
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	1,000.00	5.00	500.00	0.00	150.00
Totals				10,000.00		5,000.00	0.00	1,500.00

[Back](#) [Continue](#)

Online Return – Employee Pay & Contributions – This Period page

Useful Information

- 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 Section** and **50/50 Section** 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.
- Save the data by selecting the **Continue** button. It will not be saved until you do this.



Employee Contributions & Pay – Year to Date 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 Return - Employee Pay & Contributions - Year to Date

✔ Online Return employee information successfully saved.

This is a summary of each employee's pay and contributions for the year to date.

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 to the previous page.

Click 'Continue' to validate and save the pay and contributions information displayed and continue to the next page.

Employee Pay & Contributions - Year to Date Payroll Period End Date: 31-12-2023

Back Continue

NI Number	Payroll Ref	Surname	Forenames	This Pay Period Totals			Year to Date Totals					
				EE Main	EE 50/50	ER	EE Main	EE 50/50	ER	Care Pay Main Section	Care Pay 50/50 Section	Full Time Equivalent Pay
JH229031D	[22976] [M01 306970]	Bishop	Daphne	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
JH357401A	[92006311] [1342576]	Boyce	Billie	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
JJ316504A	[92006284] [1061844]	Bowles	Kaja	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
PT000019C	[HUN82645] [BB33264]	Block	Andreas	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
SL043242A	[3296] [3296]	Beck	Arif	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
WM389457D	[3441026] [1274155]	Bloom	Amirah	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	500.00	0.00	150.00	1,000.00	0.00	350.00	2,000.00	0.00	15,000.00
Totals				5,000.00	0.00	1,500.00	10,000.00	0.00	3,500.00	20,000.00	0.00	150,000.00

Back Continue

Online Return – Employee Pay & Contributions – Year to Date page

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

Select the **Continue** button to save and navigate to the next page of the return.

Useful Information

- 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 values 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** page.

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 Return - Employee Additional Contributions

✓ Online Return employee information successfully saved.

This is a summary of each employee's additional contributions for this pay period.

If any of the additional contributions are incorrect for an employee, change the value.

Click 'Back' to return to the previous page.

Click 'Continue' to validate and save the additional contributions information displayed and continue to the next page.

Employee Additional Contributions Payroll Period End Date 31-12-2023

Back
Continue

NI Number	Payroll Ref	Surname	Forenames	This Pay Period				This Financial Tax Year	
				EE-APC	SC-APC	AVCs	Add Conts/ARCs	EE-APC	SC-APC
JH229031D	[22976] [M01 306970]	Bishop	Daphne	0.00	0.00	0.00	0.00	0.00	0.00
JH357401A	[920006311] [1342576]	Boyce	Billie	0.00	0.00	0.00	0.00	0.00	0.00
JJ316504A	[920006284] [1061844]	Bowles	Kaja	0.00	0.00	0.00	0.00	0.00	0.00
PT000012C	[HUN74593] [6611131]	Bogisich	Fatimah	0.00	0.00	0.00	0.00	0.00	0.00
PT000019C	[HUN82645] [8833264]	Block	Andreas	0.00	0.00	0.00	0.00	0.00	0.00
SL043242A	[3296] [3296]	Beck	Arif	0.00	0.00	0.00	0.00	0.00	0.00
WE273002A	[21370] [M06 153963]	Bowler	Hennetta	0.00	0.00	0.00	0.00	0.00	0.00
WM389457D	[3441026] [1274155]	Bloom	Amirah	0.00	0.00	0.00	0.00	0.00	0.00
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	0.00	0.00	0.00	0.00	0.00	0.00
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	0.00	0.00	0.00	0.00	0.00	0.00
Totals				0.00	0.00	0.00	0.00	0.00	0.00

Back
Continue

Online Return – Employee Additional Contributions page

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

Select the **Continue** button to save and navigate to the next page of the return.

Useful Information

- **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.



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 Return - Employee Service

✓ Online Return employee information successfully saved.

This is a summary of each employee's 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 their part-time hours, amend the effective date and enter their new part-time / whole-time hours.

To make an employee whole-time, enter the effective date they became whole-time and remove the part-time and whole-time hours.

If the employee is term-time and does not work 52 weeks of the year adjust part-time hours.

Click 'Back' to return to the previous page.

Click 'Continue' to validate and save the additional contributions information displayed and continue to the next page.

Employee Service Payroll Period End Date 31-12-2023

[Back](#) [Continue](#)

NI Number	Payroll Ref	Surname	Forenames	Part Time?	Effective Date	Part Time Hours	Whole Time Hours
JH229031D	[22976] [M01 306970]	Bishop	Daphne	Yes	03-09-2012	18.50	37.00
JH357401A	[920006311] [1342576]	Boyce	Billie	Yes	01-04-2013	22.20	37.00
JJ316504A	[920006284] [1061844]	Bowles	Kaja		16-07-2012		
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah	Yes	01-01-2016	33.00	37.50
PT000019C	[HUN82645] [BB33264]	Block	Andreas	Yes	01-01-2016	33.00	37.50
SL043242A	[3296] [3296]	Beck	Arif		01-02-2007		
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	Yes	01-06-2007	32.69	37.00
WM389457D	[3441026] [1274155]	Bloom	Amirah		06-01-2009		
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	Yes	01-04-1999	29.76	37.00
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	Yes	02-10-2011	7.62	37.00

[Back](#) [Continue](#)

Online Return – Employee Service page

If an employee is part-time, select a value from the **Part Time?** drop-down list, enter the date of change in the **Effective Date** field and, finally, enter the new part-time and whole-time contractual hours in the **Part Time Hours** and **Whole Time Hours** fields.

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

Select 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:

$$32/52 \times 44 = 27.08/37.00$$

Employee Personal Details Page

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

Online Return - Employee Personal Details

✓ Online Return employee information successfully saved.

This is a summary of each employee's personal details.

To change any of their personal details click on the 'Edit' Button.

Click 'Back' to return to the previous page.

Click 'Continue' to continue to the next page.

Employee Personal Details

Payroll Period End Date 31-12-2023

[Back](#) [Continue](#)

NI Number	Payroll Ref	Surname	Forenames	Title	Date Of Birth	Gender	Partnership Status	Job Title	Action
JH229031D	[22976] [M01 306970]	Bishop	Daphne	Miss	08-12-1983	Female	Single	Job title	Edit
JH357401A	[920006311] [1342576]	Boyce	Billie	Miss	19-05-1980	Female	Single	Job title	Edit
JJ316504A	[920006284] [1061844]	Bowles	Kaja	Miss	27-07-1986	Female	Declared Partnership	Job title	Edit
PT000012C	[HUN74593] [8811131]	Bogisich	Fatimah	Mr	07-01-1994	Male	Married	Sales Specialist	Edit
PT000019C	[HUN82645] [8833264]	Block	Andreas	Mr	11-09-1954	Male	Married	Senior Farming Assis	Edit
SL043242A	[3296] [3296]	Beck	Arif	Mr	28-04-1969	Male	Married	Job title	Edit
WE273002A	[21370] [M06 153963]	Bowler	Henrietta	Mrs	27-07-1959	Female	Married	Job title	Edit
WM389457D	[3441026] [1274155]	Bloom	Amirah	Mrs	26-11-1961	Female	Married	Job title	Edit
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel	Mr	07-04-1948	Male	Married	Job title	Edit
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja	Mrs	08-08-1948	Female	Married	Job title	Edit

[Back](#) [Continue](#)

Online Return – Employee Personal Details page

Select the **Edit** button if you need to change the personal details of an employee. This will display the **Edit Employee Personal Details** page.

Online Return - Edit Employee Personal Details

Please enter the employee's new personal details.

Employee Personal Details


NI Number JH229031D

Payroll Ref [22976] [M01 306970]

Title

Forenames

Surname

Date Of Birth 

Gender

Partnership Status

Job Title

[Cancel](#) [Save](#)

Online Return – Edit Employee Personal Details page

Change the relevant information and select the **Save** button to save the changes and return to the summary page.

Select the **Continue** button to save and navigate to the next page of the return.

Employee Contact Details Page

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

Online Return - Employee Contact Details

This is a summary of each employee's contact details.
To change any of their contact details click on the 'Edit' Button.
Click 'Back' to return to the previous page.
Click 'Continue' to continue to the next page.

Employee Contact Details Payroll Period End Date 31-12-2023

NI Number	Payroll Ref	Surname	Forenames	Address	Email Address	Telephone Number	Mobile Number	Action
JH229031D	[22976] [M01 306970]	Bishop	Daphne	164 Ellerton Road CAMBERLEY CHORLEY BA3 5PZ	heywood.co.uk			Edit
JH357401A	[920006311] [1342376]	Boyce	Billie	254 Hemden Road ABERDEEN Hartfordshire BH15 4DS	sam.smith@aquilaheywood.co.uk			Edit
JJ316504A	[920006284] [1061844]	Bowles	Kaja	23 Radman Road Birmingham Berkshire BH16 5BA	heywood.co.uk			Edit
PT000012C	[HUN74593] [8811131]	Bogisch	Facimah	294 Hill Green Asc. 473 AB25 7YT	cecil.okeefe@yahoo.com	0208112222		Edit
PT000019C	[HUN82645] [8833264]	Block	Andreas	95502 Elisha Street Suite 666 AB25 7YT	micheal.johnson@gmail.com	0208112222		Edit
SL043242A	[3296] [3296]	Beck	Anif	200 Simth Street ABERDEEN Hartfordshire BB8 6DP	james.gavin@aquilaheywood.co.uk			Edit
WE273002A	[21370] [M06 153963]	Bowler	Hennetta	2 Eden Park WEDNESLEY Chichester Cheshire	andrew.deakin@aquilaheywood.co.uk			Edit
WM389457D	[3441028] [1274155]	Bloom	Amirah	25 Whitehouse Drive 29/43 Tower Bridge Kent Cheshire BS2 0RR	heywood.co.uk			Edit
YK222846C	[21641] [M18 308373]	Bowler	Éveliel	108 Dalmally Road Edmonton Hartfordshire BA25 3BJ	albatross@heywood.co.uk	02020 677817		Edit
YM366198C	[093193955] [0828165]	Beaumont	Kaja	2 Havtree Close FARNBOROUGH Hartfordshire BB8 9AT	ashley.threadgold@aquilaheywood.co.uk	01701 902222		Edit

Online Return – Employee Contact

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

Online Return - Edit Employee Contact Details

Please enter the employee's new contact details.

Employee Contact Details

NI Number JH229031D

Payroll Ref [22976] [M01 306970]

Surname Bishop

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Address Line 5

Postcode BA3 5PZ

Email Address

Telephone Number

Mobile Number

[Cancel](#) [Save](#)

Online Return – Edit Employee Contact Details page

Amend or enter the relevant information and select the **Save** button to save the changes and return to the summary page.

Select the **Continue** button to save and navigate to the next page of the return.

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 Return - Employee Leavers & Opt Outs

This is a summary of each employee who will be included in the return for this pay period, including those who have already left.

To tell the pension team about new leaver enter the date they left employment or opted out of the fund.

For leavers, enter a reason for leaving. For opt outs, tick the 'Are they opting out?' box.

Click 'Back' to return to the previous page.

Click 'Continue' to continue to the next page.

Employee Leavers & Opt Outs Payroll Period End Date 31-12-2023

Back Continue

NI Number	Payroll Ref	Surname	Forenames	Date Left Scheme	Select Reason	Enter Reason	Opt Out?
JH229031D	[22976] [M01 306970]	Bishop	Daphne	31-12-2023	Reason...		<input type="checkbox"/>
JH357401A	[920006311] [1342576]	Boyce	Billie		Reason...		<input type="checkbox"/>
JJ316504A	[920006284] [1061844]	Bowles	Kaja		Reason...		<input type="checkbox"/>
PT000012C	[HUN74593] [BB11131]	Bogisich	Fatimah		Reason...		<input type="checkbox"/>
PT000019C	[HUN82645] [BB33264]	Block	Andreas		Reason...		<input type="checkbox"/>
SLO43242A	[3296] [3296]	Beck	Arif		Reason...		<input type="checkbox"/>
WE273002A	[21370] [M06 153963]	Bowler	Henrietta		Reason...		<input type="checkbox"/>
WM389457D	[3441026] [1274155]	Bloom	Amirah		Reason...		<input type="checkbox"/>
YK322846C	[21641] [M18 308373]	Bowler	Ezekiel		Reason...		<input type="checkbox"/>
YM366198C	[DP3193955] [0828165]	Beaumont	Kaja		Reason...		<input type="checkbox"/>

Back Continue

Online Return – Employee Leavers & Opt Outs page

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

The **Enter Reason** field is mandatory and can be populated by selecting a reason from the **Select Reason** drop-down list. You can also edit the populated text and it has a limit of 100 characters.

To process an opt out, enter the date they opted out of the LGPS in the **Date Left Scheme** field and tick the **Opt Out?** checkbox.

Select the **Continue** button to save and navigate to the final page of the return.

Useful Information

- Do not complete the **Enter Reason** field for employees who opt out of the LGPS.

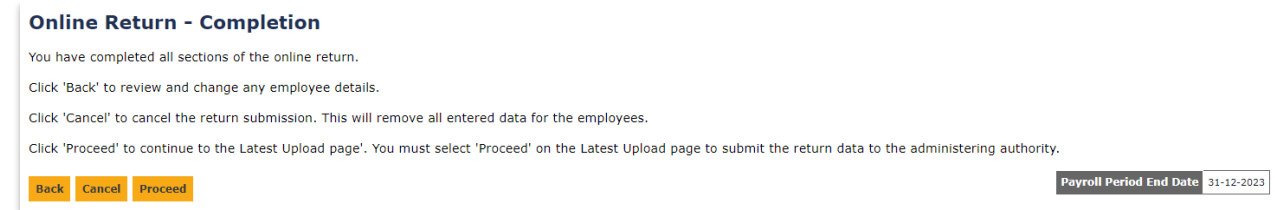


- You can remove leavers from the return when you process the next pay period, but your fund may ask you to keep them on the return until the end of the scheme year.
- If your fund has asked you to keep leavers on the return until the end of the scheme year, you must enter zeros on the **Employee Contributions & Pay – This Period** page (the pay period after the member has left), to prevent the previous pay period values being added to the cumulative totals.



Completing the Return

The **Completion** page is the final page of the online return.



Online Return - Completion

You have completed all sections of the online return.

Click 'Back' to review and change any employee details.

Click 'Cancel' to cancel the return submission. This will remove all entered data for the employees.

Click 'Proceed' to continue to the Latest Upload page'. You must select 'Proceed' on the Latest Upload page to submit the return data to the administering authority.

Back **Cancel** **Proceed**

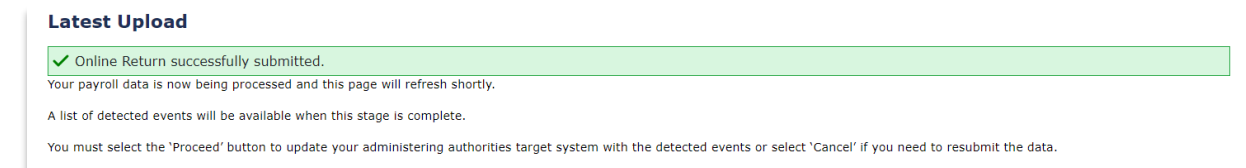
Payroll Period End Date 31-12-2023

Online Return – Completion page

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 **Latest Upload** page with an **Online Return successfully submitted** message 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.

Latest Upload page with success message

Note that no data will be sent to your pension fund's target system until you select **Proceed** on the **Latest Upload** page.

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** page.



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.

Latest Upload

Below is a summary of the latest file submission to i-Connect for the selected payroll.
You may proceed with the processing of this submission by clicking the 'Proceed' button, or alternatively cancel the submission by clicking 'Cancel'.

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
online return	30-04-2018	30-04-2018	12-07-2018 11:08:42	Payroll Upload	Pending

Submission Statistics

Total Number of Payroll Members Tracked by i-Connect		4
Omitted Payroll Members (present on a previous submission, and no leaver event processed)		0

Payroll Members submitted this period	4	Payroll Members in Error	0	Accepted for Processing	4
Pensionable Pay (Period)	£4,750.00	Employee Main Contributions (Period)	£261.25	AVCs (YTD)	£15.10
Main CARE Pay (YTD)	£4,750.00	Employee Main Contributions (YTD)	£261.25	Add Conts/ARCs (YTD)	£0.00
50/50 CARE Pay (YTD)	£0.00	Employee 50/50 Contributions (Period)	£0.00	Shared Cost APCs (Period)	£120.00
		Employee 50/50 Contributions (YTD)	£0.00	Shared Cost APCs (YTD)	£120.00
		Employer Contributions (Period)	£760.00	Employee APCs (Period)	£60.00
		Employer Contributions (YTD)	£760.00	Employee APCs (YTD)	£60.00

Submitted By User	emplake		Processed By User
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Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	1	1	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Opt In	0	0	0	0	0	0	0	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>
Salary	4	4	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Contributions	4	4	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Additional Contributions	2	2	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
CARE Pay	4	4	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Service	0	0	0	0	0	0	0	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>
Service Break	0	0	0	0	0	0	0	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>
Member Details Update	1	1	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Member Address Update	1	1	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Works Address Update	0	0	0	0	0	0	0	<div style="width: 0%; height: 10px; background-color: #ccc;"></div>
Opt Out	1	1	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>
Leaver	1	1	0	0	0	0	0	<div style="width: 100%; height: 10px; background-color: #ccc;"></div>

➤ Proceed
➤ Cancel

Latest Upload (Events Summary) page

View Schedule of Contribution Rates

We have added a link to the dashboard to help users understand the current and previous contribution rates. This will show the **Schedule of contribution rates** table, and this is accessible for editing via the **View Employer Details** page.



Submission Statistics

Total Number of Payroll Members Tracked by i-Connect	4				
Omitted Payroll Members (present on a previous submission, and no leaver event processed)	0				
Payroll Members Submitted	4	Payroll Members in Error	0	Accepted for Processing	4

Pay Summary

	Contributions This Period		Contributions Year To Date (YTD)		
Pensionable Pay (Period)	£1,200.00	Employee Main Contributions	£400.00	Employee Main Contributions	£918.00
Main CARE					31.20
50/50 CARE					1,161.00
					158.00
					50.02
					37.00
					77.00
					176.00

Schedule of contribution rates X

Location 99901

Date Effective From	Date Effective To	Overall Contribution Rate	Primary Contribution Rate	Secondary Contribution Rate	Secondary Contributions (Period)	IHLI Discount
16-11-2020	15-11-2022	9.00%	7.50%	3.50%	£50.00	2.00%
15-11-2017	15-11-2020	10.50%	10.00%	4.00%	£77.00	3.50%
15-11-2016	14-11-2017	10.00%	9.00%	2.00%	£60.00	1.00%

Employer Overall Contribution Rate (Period)	10.5%	Expected Employer Contributions (Period)	£126.84	Expected Employer Payments (YTD)	£2,432.22
View schedule of rates		Difference	+£877.16		
		Total Payments Due (Period)	£1,763.56	Total Payments Made (YTD)	£2,000.00
		Total Payments Provided (Period)	£2,000.00	Difference between Payments Made and Expected (YTD)	-£432.22
		Payment Difference	+£236.44	Reason for difference (if given)	Sorry boss

Submitted By User: devlg Processed By User: devlg

Schedule of contribution rates table

Remittance Confirmation

Once enabled, when the employer proceeds with a submission they will be presented with the **Remittance Confirmation** window. Here the employer enters the total payment they plan to make. Should the amount differ to the **Total Payments Due** amount, they will be prompted to add a reason for the difference.

Should the employer want to provide a reason even if the amounts are the same, this option is available to them.



Submitted By User: iconnectuser242		Total Payments Due (Period)	£1,800.00	Total Payments (YTD) (excl. AVCs)	£5,900.00				
Events		Total Payments Provided (Period)		Reason for difference (if given)					
New Starter		Payment Difference							
Opt In		<div style="border: 1px solid #ccc; padding: 10px;"> <h3 style="text-align: center;">Remittance Confirmation</h3> <p style="text-align: center;">Please confirm payment amount for this period</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Period End Date</th> <th style="width: 70%;">Total Payments Due (Period)</th> </tr> </thead> <tbody> <tr> <td>31-01-2024</td> <td>£1,800.00</td> </tr> </tbody> </table> <p>*Total Payments to be made <input style="width: 150px;" type="text" value="£ 1,800.00"/></p> <p>Please include a short explanation for the difference, if applicable. <input style="width: 150px;" type="text" value="Please type here (max. 250 characters)"/></p> <div style="background-color: #fff9e6; padding: 5px; border: 1px solid #ccc; margin: 5px 0;"> I confirm that the figures supplied are an accurate record of the amounts calculated from the payroll and will be paid to AdminBotswana and AVC providers as appropriate. </div> <p style="text-align: center;"> Proceed Back </p> </div>				Period End Date	Total Payments Due (Period)	31-01-2024	£1,800.00
Period End Date	Total Payments Due (Period)								
31-01-2024	£1,800.00								
Service						Suppressed		Progress	
Salary						0		0	
Contributions						0		0	
Additional Contributions						0		0	
CARE Pay						0		0	
Service Break						0		0	
Member Details Update						0		0	
Member Address Update		0		0					
Works Address Update		0		0					
Opt Out		0		0					
Leaver		0		0					
Proceed Cancel									

Remittance Confirmation window

Sending Data to the Fund

To send the data to the fund, select the **Proceed** button or select the **Cancel** button to cancel the upload process.

When you select **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.

Latest Upload

Below is a summary of the latest file submission to i-Connect for the selected payroll.

You may proceed with the processing of this submission by clicking the 'Proceed' button, or alternatively cancel the submission by clicking 'Cancel'.

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
online return	31-01-2024	31-01-2024	01-11-2023 10:31:07	Payroll Upload	Pending

Submission Statistics	
Total Number of Payroll Members Tracked by i-Connect	10
Omitted Payroll Members (present on a previous submission, and no leaver event processed)	0
Total Number of Potential Single Continuous Employments	0

Payroll Members Submitted	10	Payroll Members in Error	0	Accepted for Processing	10
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Pay Summary		Contributions This Period		Contributions Year To Date (YTD)	
Pensionable Pay (Period)	£9,000.00	Employee Main Contributions	£450.00	Employee Main Contributions	£1,050.00
Main CARE Pay (YTD)	£29,000.00	Employee 50/50 Contributions	£0.00	Employee 50/50 Contributions	£0.00
50/50 CARE Pay (YTD)	£0.00	Employer Contributions	£1,350.00	Employer Contributions	£4,850.00
		Add Conts/ARCs	£0.00	Add Conts/ARCs	£0.00
		Shared Cost APCs	£0.00	Shared Cost APCs	£0.00
		Employee APCs	£0.00	Employee APCs	£0.00
		Secondary Contributions	£0.00	Secondary Contributions	£0.00
				AVCs	£0.00

Employer Overall Contribution Rate (Period)	15%	Expected Employer Contributions (Period)	£1,350.00	Expected Employer Payments (YTD)	£5,900.00
View schedule of rates		Difference	£0.00		
Total Payments Due (Period)		£1,800.00	Total Payments (YTD) (excl. AVCs)		£5,900.00
Total Payments Provided (Period)			Reason for difference (if given)		
Payment Difference					

Submitted By User: iconnectuser242 Processed By User:

Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	0	0	0	0	0	0	0	
Opt In	0	0	0	0	0	0	0	
Service	0	0	0	0	0	0	0	
Salary	10	10	0	0	0	0	0	<input type="text"/>
Contributions	10	10	0	0	0	0	0	<input type="text"/>
Additional Contributions	0	0	0	0	0	0	0	
CARE Pay	9	9	0	0	0	0	0	<input type="text"/>
Service Break	0	0	0	0	0	0	0	
Member Details Update	0	0	0	0	0	0	0	
Member Address Update	0	0	0	0	0	0	0	
Works Address Update	0	0	0	0	0	0	0	
Opt Out	0	0	0	0	0	0	0	
Leaver	0	0	0	0	0	0	0	

Proceed **Cancel**

Latest Upload (Events Summary) page

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.

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*, contact your pension fund.

Want to Know More?

Look at these guides:

- [i-Connect Login Guide](#)
- [i-Connect File Upload Guide](#)
- [i-Connect Onboarding Guide](#)
- [i-Connect Reporting and Communications Guide](#)

