i-Connect Online Return Guide
Supplying employee data manually

28 May 2020

Contents

Aquila Heywood

Published by i-Connect Software Limited

Hamilton House Church Street Altrincham Cheshire WA14 4DR

0161 613 4200

www.i-connectdata.co.uk

documentation@heywood.co.uk

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.

1.1 Explanation of Terms used in this Guide

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

Aquila Heywood

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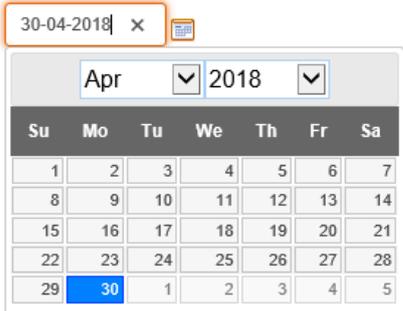
or in a 'dd-mm-yyyy' format, for example 30-04-2018. Forward slashes are not accepted.

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.

Aquila Heywood

2 Dashboard

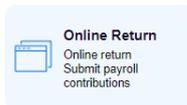Immediately after you sign in, the **Payroll Dashboard** will be displayed:
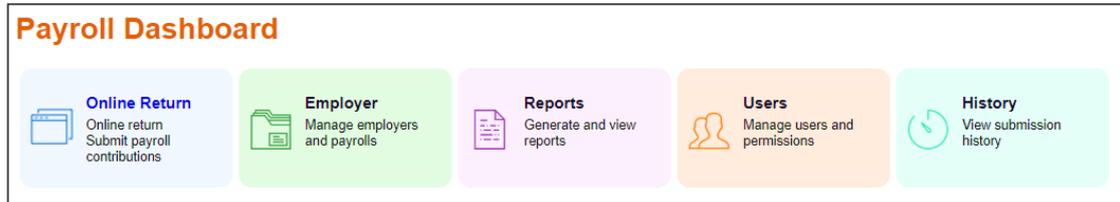
You start the member matching process, described in the next section, from the **Payroll Dashboard**.

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.

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

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 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	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 Selected Members   < Cancel 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:

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.

Aquila Heywood

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.

Aquila Heywood

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:

Online Return - Start

The next expected payroll period end date for an online return is: **30-04-2018**

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

> Start Online Return

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 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 Return - Employee Contributions & Pay - This Period values

🛑 Member #4 :Employee contribution rate must be in the range 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

< Back   > Continue

NI Number	Payroll Ref	Pensionable Pay	Contribution Rate	Employee Contributions Main Section	Employee Contributions 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

< Back   > Continue

Aquila Heywood

4.1 Employees Page

The first page of the return is the 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 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.

Useful Information

- 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':

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:

Click the Continue button to move to the next page.

Aquila Heywood

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 Contributions & Pay - This Period values

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

❮ Back   ❯ Continue

| NI Number | Payroll Ref | Pensionable Pay | Contribution Rate | Employee Contributions | | | Employer Contributions |
				Main Section	50/50 Section	Total	
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	0.00	261.25	760.00

❮ Back   ❯ Continue

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 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'!

Aquila Heywood

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.

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.

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 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 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.

| | | Payroll Period End Date | 30-04-2018 |

Employee Additional Contributions

‹ Back   › Continue

| NI Number | Payroll Ref | This Pay Period | | This Financial Tax Year | | | |
		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.

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.

Aquila Heywood

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:

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

Aquila Heywood

4.6 Employee Personal Details Page

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

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

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 Return - Employee Contact Details

This is a summary of each employees 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.

	Payroll Period End Date	30-04-2018

Employee Contact Details

< 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

< 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 employee's new contact details.

Employee Contact Details

NI Number	NA111333B
Payroll Ref	134057
Surname	Proctor
Address Line 1	10 Springwell Gardens
Address Line 2	Chorlton-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.

Aquila Heywood

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:

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.

Useful Information

- 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.

Aquila Heywood

4.9   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.

Payroll Period End Date	30-04-2018

Back   Cancel   Proceed

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

❶ 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.

Aquila Heywood

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):

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	empflake	Processed By User	

Events	Total	Pending	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 Contributions	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	1	1	0	0	0	0	0	
Member Address Update	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	

> Proceed   < Cancel

Aquila Heywood

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 Activities

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	Complete

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	empflake	Processed By User	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 Contributions	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 Update	1	0	0	1	0	0	0	▭
Member Address Update	1	0	0	1	0	0	0	▭
Works Address Update	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.

Aquila Heywood

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.

Aquila Heywood

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