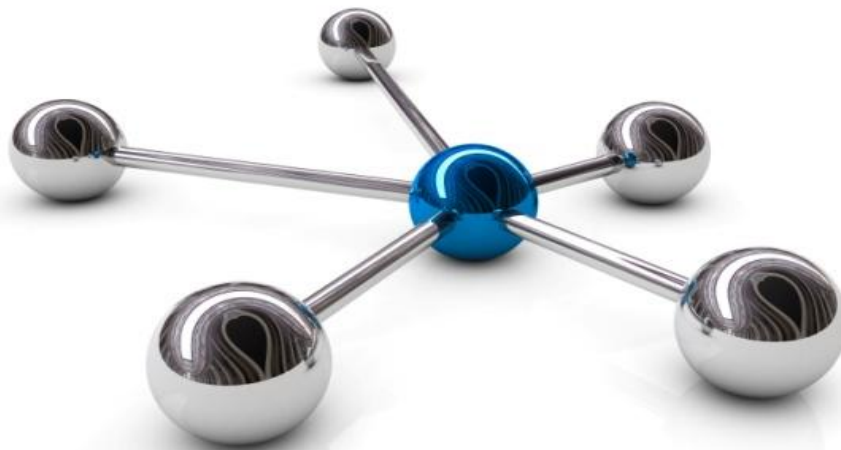




Setting up a payroll account

This guide takes you through the one off exercises you must complete before you can send data to your Pension Fund.

The Onboarding consists of two stages – creating a payroll record and member matching payroll records to pension records.



i-Connect

Onboarding Guide



Introduction

This guide explains how to create an account on i-Connect so that you can send information about Local Government Pension Scheme (LGPS) members in your organisation to the pension fund.

i-Connect is an Internet application which helps to manage the transfer of employee information from payroll administrators to pensions administrators.

You enter information about your payrolls into the i-Connect application using a web browser. i-Connect will prompt you to go through a member matching exercise where the records in the payroll extract file are matched to pensions in your pension funds administration system.

Who to Contact

If you have any questions about using the i-Connect service please contact your Pension Fund.

i-Connect

Onboarding Guide



Dashboard

After you have signed in you will land on the 'Dashboard' screen, you will be reminded to create a payroll record.

Dashboard

Reminders

Utlesford District Council has been onboarded and you are now managing this employer. [Click here to create the first payroll.](#)

Click on the Reminder banner to start the New Payroll Wizard. The 'New Payroll' page is displayed with fields that need to be completed.

Payroll Wizard

Hover your mouse over any icon, button, input box or field to display a tooltip to help you,

New Payroll

This page is used to set up a new payroll which will be managed via i-Connect. Enter the details for the new payroll in the form below.

Employer Name	Utlesford District Council
Payroll Name	<input type="text"/>
PAYE Reference	<input type="text"/>
NI Match Type	Full ▾
Auto Process	<input type="checkbox"/>
Submission Retention Period (Years)	1 ▾
Next Payroll Period End Date	31 ▾ January ▾ 2014 ▾

Payroll Name. Enter a meaningful name that you will remember.

NI Match Type. Leave this as the default setting of 'Full'.

Submission Retention period (Years). The default for retaining a history of file processing in i-Connect is 1 year. You can change this to either 2 or 3 years.

PAYE Reference. Enter your HMRC PAYE reference.

Auto Process. By checking this box, i-Connect will process automatically if no errors are found. We recommend you leave this box unchecked for the first few months of processing.

Next Payroll Period End Date. This defaults to the current date. You must change it to the payroll period end date that you will start using i-Connect.

i-Connect

Onboarding Guide



Click the 'Proceed' button to progress to the next step of wizard – 'Edit Payroll Period':

Edit Payroll Period

Payroll successfully created. You will now be prompted to define the payroll period type, tolerances and email configuration for the new payroll.

Select the payroll period frequency in the box below.

Do you pay ?

Select the frequency you pay the employees from the drop-down list.

Click the 'Proceed' button to progress to the next step of wizard – 'Edit Payroll Period':

Edit Payroll Period

Select the expected submission date of the payroll extract for this payroll.

What is your typical payroll period end date? (Day of Month)

What is your submission date? (Day of Month)

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Select the 'Typical Payroll Period End Date' and 'Submission Date' from the drop-down lists for the payroll. The submission date is usually the date on which the payroll cuts off, and hence the date on which the i-Connect extract file will be available to upload to i-Connect.

Click the 'Proceed' button to progress to the next step of wizard – 'Edit Payroll Period':

Edit Payroll Period

Select when you would like email reminders to be sent out for the payroll file submissions for this payroll.

Prior Submission Reminder (Number of Days)

Late Submission Reminder (Number of Days)

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This step sets submission reminders. Change the default values for the reminders to submit the i-Connect extract file, or if you are late submitting the file, based on whether you pay Monthly, Four Weekly, Fortnightly or Weekly.

Click the 'Proceed' button to progress to the next step of wizard – 'Edit Payroll Tolerances'.

i-Connect

Onboarding Guide



i-Connect checks the payroll tolerances during each payroll extract file upload and outputs a validation warning if the tolerance is breached.

Set payroll tolerances for Employee Contributions, Gross Earnings and Payroll Members, as an amount or as a percentage:

Edit Payroll Tolerances

Please enter the allowed tolerances for a payroll submission. The tolerances may either be the amount difference from one payroll submission to the next, or the percentage change. A tolerance on the total number of payroll members processed is mandatory, but all other tolerances may be left blank if they are not required.

Employee Contributions	<input type="text" value="10"/>	<input type="radio"/> Amount	<input checked="" type="radio"/> Percentage
Gross Earnings	<input type="text" value="10"/>	<input type="radio"/> Amount	<input checked="" type="radio"/> Percentage
Payroll Members	<input type="text" value="10"/>	<input checked="" type="radio"/> Amount	<input type="radio"/> Percentage

Click the Proceed button to progress to the final stage of the wizard.

The final stage of the New Payroll Wizard is where you configure i-Connect email alert notifications:

Edit Payroll Email Configuration

Configure the email alert policy for this payroll using the form below. You must enter at least one email address, as addresses will be used to send out reminders as well as receive the selected notifications.

Email Stages	
File uploaded	<input checked="" type="checkbox"/>
Ineligible file upload	<input checked="" type="checkbox"/>
File format incorrect	<input checked="" type="checkbox"/>
File processing started	<input checked="" type="checkbox"/>
File errors detected	<input checked="" type="checkbox"/>
Tolerance failure(s)	<input checked="" type="checkbox"/>
File processing complete	<input checked="" type="checkbox"/>
Payroll processing cancelled	<input checked="" type="checkbox"/>
Payroll processing started	<input checked="" type="checkbox"/>
API errors detected	<input checked="" type="checkbox"/>
API processing completion	<input checked="" type="checkbox"/>

Email Addresses

Tick the checkbox for each email you would like to receive. Click the Add Email Address button, enter your email address, and tick the adjacent checkbox. You can add additional email addresses by clicking the Add Email Address button and repeating the above step.

You must select at least one email stage and enter one email address before you can complete the new payroll configuration.

Click the 'Complete Payroll Configuration' button.

i-Connect

Onboarding Guide



A summary of the choices you made in the wizard is displayed in one page

Payroll Details

[Payroll details saved successfully. Click here to begin the member matching process for this payroll.](#)

Details for this payroll as stored on i-Connect are displayed below.

Employer Name	Uttlesford District Council
Payroll Name	Uttlesford DC Monthly
Payroll Status	Inactive (awaiting member matching file submission)
PAYE Reference	124/IC312
Interface Name	Default
III Match Type	Full
Auto Process	NO
Submission Retention Period (Years)	1
Next Payroll Period End Date	31 January 2014
Payroll Period Type	Monthly
Normal Submission Date (Day of Month)	31
Prior Submission Reminder (Number of Days)	7
Late Submission Reminder (Number of Days)	3
Tolerances	Employee Contributions : 10.00 % Gross Earnings : 10.00 % Payroll Members : 10.00
Email Addresses	john.smith@uttlesforddc.gov.uk
Email Stages	File uploaded Ineligible file upload File format incorrect File processing started File errors detected Tolerance failure(s) File processing complete Payroll processing cancelled Payroll processing started API errors detected API processing completion

[Edit Payroll Details](#) [Edit Payroll Period](#) [Edit Payroll Tolerances](#) [Edit Email Configuration](#)

You can change any of your choices by selecting one of the edit buttons at the bottom of the page.

Additional Payrolls

If you have more than one payroll, for example a monthly payroll and a weekly payroll, you can create additional payrolls by clicking the 'New Payroll' button located at the top of the Payroll Details page or by returning to the Dashboard and clicking the 'Employer' icon.

i-Connect

Onboarding Guide



Member Matching

Member matching is a one-off exercise that creates a 'one to one' link between each post on your payroll system and each active record on the funds pensions' administration system.

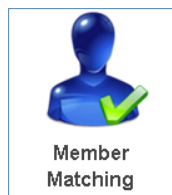
The link is created by comparing the following fields from your payroll system, against the active pension administration records of each of your employees on the administering authority's target system.

i-Connect uses the following fields to match payroll records to pension records.

NI Number	Payroll Ref	DOB	Surname	Gender
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Any unmatched records in the payroll extract file will be created as starters or opt-outs.

Click the Member Matching icon on the Dashboard to begin:



i-Connect will prompt you to browse to the location on your network where the payroll extract file is stored:

Member Matching

Prior to payroll submission processing, members on the target system must be matched with those on a payroll file. Please click on the 'Browse' button to choose a payroll file to upload for the member matching process.

Use the explorer window to navigate to the file you wish to upload, click on it to select it and then select 'Open'.

Click 'Upload File' to upload the file to i-Connect.

Choose File Browse...

Click the 'Browse' button, navigate to the file location and select the 'Upload File' button.

i-Connect then processes the file, matching payroll records to pensions records. This process can take approximately 20-30 minutes to complete. If the process is still running after one hour please contact the i-Connect help desk.

Should you logout before the process has completed, i-Connect will send you an email to advise you that you can start the next stage in member matching.

When the comparison processing completes, a new page will be displayed showing a summary of the member matching:

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Onboarding Guide



Member Matching

Below are the current statistics of the member matching process for this payroll.

Click 'View Next Conflict' to view the next member conflict to be resolved.

Members on payroll file	14
Exact matches	8
Unmatchable members	4
Members found in conflict	2
Number of conflicts resolved	0
Progress	<input type="text"/>

You can logout at any stage during the member matching process, even during the conflict resolution stage. i-Connect will remember your progress and update the Member Matching table with the number of conflicts resolved.

Members in the payroll extract file are placed into the following categories: **Exact matches**, **Unmatchable members** and **Members found in conflict**.

Resolving Member Matches Conflicts

Start resolving member matching conflicts by clicking the 'View Next Conflict' button. The first member matching conflict will be displayed:

Member Matching

Below is a member located on the payroll file that could not be matched exactly to a member in the target system. Please select the member from the target system that matches this member, or indicate that the member is a new starter or opted out of the scheme.

Any potential matches that are greyed out have already been matched during this matching process. These can be matched to this member by clicking 'Undo / Match', which will undo the existing match to that member and create a new match to the payroll member on the screen.

Payroll Member	Payroll Reference	NI Number	Surname	Date of Birth	Gender
	30808007	UG208007A	Brunt	07 January 1961	Female

Potential Matches

	Score	Payroll Ref	NI Number	Date of Birth	Gender	Surname	Forename	Ident 1	Ident 2	Ident 3	Job Title
<input type="radio"/>	60%	30808114	UG208007A	07/01/61	Female	Brunt	Mary	30808114			
<input type="radio"/>	60%	308080078	UG208007A	07/01/61	Female	Brunt	Mary	308080078			

Matching Progress: 0 / 2 member conflicts resolved

You may need to speak to your pension fund to help with the member matching decision making process

The table at the top of the screen displays 'Payroll Member' information uploaded from the payroll extract file. The lower table displays potential matches on the fund's system.

If you agree with a potential match, select the relevant radio button and click the 'Confirm Member Match' button. If you disagree with the potential matches displayed in the table, click the 'This member is a new starter / has opted out of the pension scheme' button.

i-Connect will then create a new record on your administering authority's target system for the payroll member.

If a potentially matched member on the target system has already been matched, you can break the existing match and create a new one.

i-Connect will display a message all member conflicts have been resolved.

i-Connect

Onboarding Guide



Any unmatched members are displayed on the same page:

Member Matching

i Member conflict resolved.

Below is a list of the members from the payroll file which could not be matched to any members on the target system. Please confirm that these members are new starters or are opted out of the scheme.

Payroll Ref	NI Number	Surname	Date of Birth	Gender
30808011	UG208011A	Dale	11 January 1961	Female
30808013	UG208013A	James	13 January 1961	Female
30808014	UG208014A	Lewis	14 January 1961	Male
30808012	UG208012A	Peel	12 January 1961	Male

✔ These members are new starters / have opted out of the pension scheme

Click the 'These members are new starters / have opted out of the pension scheme' button. i-Connect will then display a 'Unmatchable members confirmed as new starters or opted out of the scheme' message along with the results of the member matching process:

Member Matching

i Unmatchable members confirmed as new starters or opted out of the scheme.

Below are the current statistics of the member matching process for this payroll.

Members on payroll file	14
Exact matches	8
Unmatchable members	4
Members found in conflict	2
Number of conflicts resolved	2
Progress	<div style="width: 100%; height: 10px; background-color: green;"></div>

✔ Confirm Matching Complete **↺** Reset All Matches For Submission **✖** Cancel Matching Process

Complete the member matching process and proceed to the payroll update stage by clicking the 'Confirm Matching Complete' button. Alternatively, you can reset all matches and begin member matching again by clicking the 'Reset All Matches For Submission' button.

To cancel the entire member matching process click the 'Cancel Matching Process' button.

Payroll Update

The payroll update stage begins automatically when you click the 'Confirm Matching Complete' button. Member data on the fund's system is updated with the mis-matched payroll reference numbers.

Payroll Update

i-Connect is currently updating payroll references on the target system. When this processing is complete, this page will allow you to upload a payroll file for processing. Please try again shortly.

i-Connect

Onboarding Guide

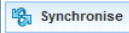


Payroll Synchronisation

i-Connect displays the Payroll Synchronisation page after the payroll update has completed:


Payroll Synchronisation

The payroll data stored in i-Connect requires synchronising with the target system before the next payroll file can be uploaded. Please press the 'Synchronise' button below to begin this process.



Click the 'Synchronise' button to update i-Connect with data from the target system. This ensures that all member matches are maintained for future payroll file uploads, providing the payroll records remain on the monthly payroll extract file:

Payroll Synchronisation

 Synchronisation with the target system has started.

i-Connect is currently synchronising the payroll data with the target system. The facility to submit a payroll file will be available again shortly.


Once the payroll synchronisation process completes the payroll is ready for regular 'Business As Usual' processing:

Upload File

Please click on the 'Browse' button to choose a payroll file to upload. Use the explorer window to navigate to the file you wish to upload, click on it to select it and then select 'Open'. Click 'Upload File' to upload the file to i-Connect.

The next expected payroll period end date for a payroll file upload is: **31 January 2014**

Choose File



Want to Know More?

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- **Online Return**
- **Login**
- **File Upload**