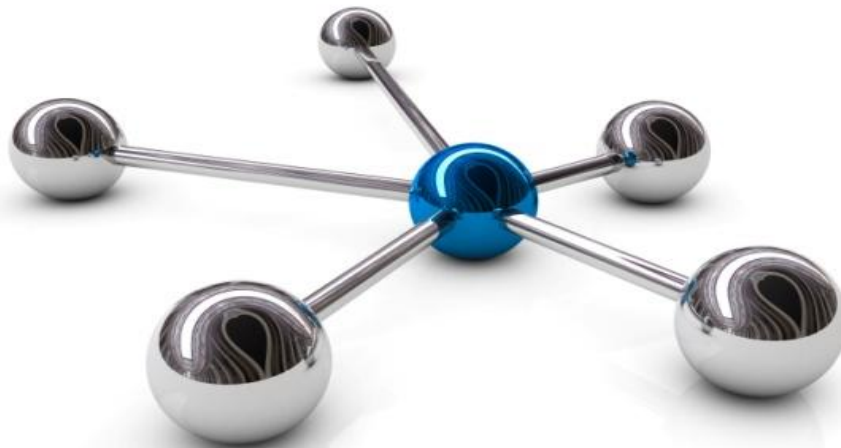**i-Connect**

Online Return Guide

Supplying employee data manually

This guide takes you through the i-Connect Online Return so you can manually send data to your Pension Fund.

The Online Return is best for micro / small employers who do not have access to their payroll system or prefer to enter the employee data rather than uploading a file.

i-Connect
Online Return Guide

Introduction

This guide explains how to use i-Connect to 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 employees into the i-Connect application 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 also fulfils your record keeping obligations.

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.
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 the 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.
Whole Time Hours	The weekly whole-time hours for the employee's post.

Who to Contact

If you have any questions about using the Online Return please contact your Pension Fund.
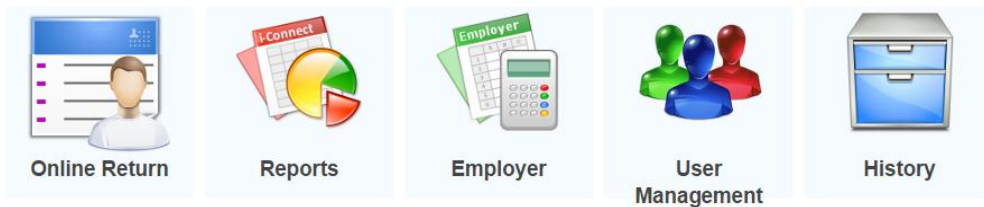
Member Matching

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 fund's pension administration system.

Dashboard

After you have signed in you will land on the 'Dashboard' screen, from where you will be able to start the member matching process.
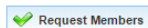

Click on the Online Return icon to start member matching.

Click the 'Request Members' button to display a list of employees to include in the Online Return submission.

This page is displayed while i-Connect selects members from Altair for inclusion in the Online Return.

The table displays members selected from Altair. If you agree that the member is active on your payroll, tick the check box.

To cancel member matching click the 'Cancel Member Matching' button.

Complete the member matching process by clicking the 'Confirm Selected Members' button.

To cancel member matching click on the 'Cancel Selected Members' button.

When this page is displayed, click the 'Synchronise Member Data' button.

This page is displayed while data is being synchronised.

This page is displayed while data is being synchronised.

Online Return - Synchronisation

ⓘ Online Return member synchronistation 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.

When member matching completes, this page is displayed. You are now ready to complete your first Online Return.

Online Return - Start

The next expected payroll period end date for an online return is: **30-04-2016**

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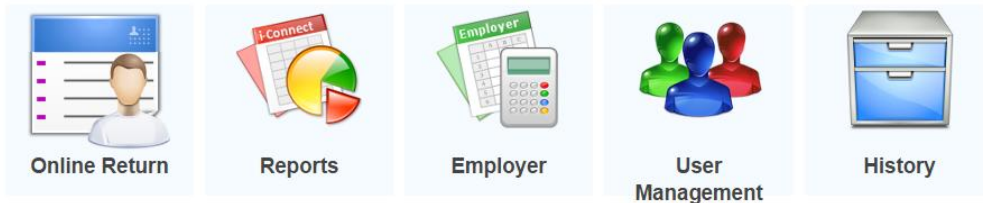
✔ Start Online Return

i-Connect
Online Return Guide

Dashboard

After you have signed in you will land on the 'Dashboard' screen, where you will be able to send employee data to the pension fund.

Dashboard

Online Return   Reports   Employer   User Management   History

Click on the Online Return icon to submit employee data for this pay period.

The 'Employees' page is displayed showing a list of the employees who you will enter data for this pay period.

If you have any new starters to add to the return click the 'add new starter' button

Otherwise click on the 'continue' button to move to the next page

Online Return

This is a summary of each employee who will be included in the return for this pay period.

Click the 'Add New Starter' button to add any new employee to the return.

Click the 'Remove' button to remove any new starter or leaver from the return.

Click the 'Continue' to go to the contributions and pay page.

Payroll Period End Date	30-04-2016

Employees

Add New Starter

Continue

NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Action
MX000003A	M300003	Allen	Pauline	Female	03-01-1961	Active	
MX000004A	M300004	Carbery	Coleen	Female	04-01-1961	Active	
MX000005A	M300005	Johnston	Carol	Female	05-01-1961	Active	
MX000006A	M300006	James	Harry	Male	06-01-1961	Active	
MX000012A	M300012	Denton	Daniel	Male	02-01-1961	Active	
MX000013A	M300013	Allen	Pauline	Female	03-01-1961	Active	
MX000014A	M300014	Carbery	Coleen	Female	04-01-1961	Active	
MX000015A	M300015	Johnston	Carol	Female	05-01-1961	Active	
MX000022A	M300022	Denton	Daniel	Male	02-01-1961	Active	
MX000023A	M300023	Allen	Pauline	Female	03-01-1961	Active	
MX000024A	M300024	Carbery	Coleen	Female	04-01-1961	Active	

Continue

New Employee

To add a new employee to the return enter data in all the fields and click 'Save'

If you miss any information, a message will be displayed at the top of the page letting you know what data is missing or not right.

If the employee is working in one or more posts, each post must be treated separately, with the additional post being set up as a new starter with a unique identifier (post number).

To remove any employees added to the return by mistake click the 'Remove' button

					Payroll Period End Date		30-04-2016

Employees

[Add New Starter]

[Continue]

NI Number	Payroll Ref	Surname	Forenames	Gender	Date Of Birth	Status	Action
MX000003A	M300003	Allen	Pauline	Female	03-01-1961	Active	
MX000004A	M300004	Carbery	Coleen	Female	04-01-1961	Active	
MX000005A	M300005	Johnston	Carol	Female	05-01-1961	Active	
MX000006A	M300006	James	Harry	Male	06-01-1961	Active	
MX000012A	M300012	Denton	Daniel	Male	02-01-1961	Active	
MX000013A	M300013	Allen	Pauline	Female	03-01-1961	Active	
MX000014A	M300014	Carbery	Coleen	Female	04-01-1961	Active	
MX000015A	M300015	Johnston	Carol	Female	05-01-1961	Active	
MX000022A	M300022	Denton	Daniel	Male	02-01-1961	Active	
MX000023A	M300023	Allen	Pauline	Female	03-01-1961	Active	
MX000024A	M300024	Carbery	Coleen	Female	04-01-1961	Active	
WE203185B	1340547	Bradbury	Paul	Male	31-08-1997	New Starter	Remove

[Continue]

Click the 'Continue' button to move to the next page.

Employee Contributions and Pay – this Pay Period

This is the next page displayed; we use it to ask you for current pay period values for the employees' pensionable pay and contributions.

Please note that all fields will be blank before completing the online return for the first time.

Online Return - Employee Contributions & Pay - this Pay Period

Member #12 :Employee pensionable pay is mandatory, please enter 0 if nil pensionable pay this period.
Member #12 :Employee contribution rate is mandatory and must be a decimal value in the range 2.75 to 12.50.
Member #12 :Employee main section contribution is mandatory, please enter 0 if nil contributions this period.
Member #12 :Employee 50/50 section contribution is mandatory, please enter 0 if nil contributions this period.
Member #12 :Employer contribution is mandatory, please enter 0 if nil contributions this period.

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	30-04-2016

Employee Contributions & Pay - this Pay Period

Back | Continue

NI Number	Payroll Ref	Pensionable Pay	Contribution Rate	Employee Contributions			Employer Contributions
				Main Section	50/50 Section	Total	
MX000003A	M300003	1,666.67	5.80	96.67	0.00	96.67	333.33
MX000004A	M300004	1,416.66	5.50	77.92	0.00	77.92	283.33
MX000005A	M300005	1,250.00	5.80	72.50	0.00	72.50	250.00
MX000006A	M300006	2,083.33	6.50	135.42	0.00	135.42	416.67
MX000012A	M300012	500.00	5.80	29.00	0.00	29.00	100.00
MX000013A	M300013	954.16	5.80	55.34	0.00	55.34	190.83
MX000014A	M300014	1,041.66	5.80	60.41	0.00	60.41	208.33
MX000015A	M300015	2,916.66	6.80	198.33	0.00	198.33	583.33
MX000022A	M300022	1,541.66	5.80	89.42	0.00	89.42	308.33
MX000023A	M300023	1,625.00	5.80	94.25	0.00	94.25	325.00
MX000024A	M300024	1,750.00	5.80	101.50	0.00	101.50	350.00
WE203185B	1340547					0.00	
Totals		16,745.80		1,010.76	0.00	1,010.76	3,349.15

Back | Continue

If you miss any information, a message will be displayed at the top of the page letting you know what data is missing or not right.

Use the totals at the bottom of each column to check the values match against payroll

On the next month's return, the previous month's values are used by default, you only need to change the values that are different this month.

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Employee Contributions and Pay – Year to Date values

This is the next page displayed; we use it to ask for Year to Date (YTD) values for pensionable pay and contributions for the current scheme year – that is 1 April to 31 March

The pay period values from the previous page will fill the YTD values the first month you use i-Connect. You must update with the correct YTD values if you start using i-Connect part way through the year.

Online Return - Employee Contributions & Pay - Year to Date values

ⓘ Online Return employee information successfully saved.

This is a summary of each employees 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.

	Payroll Period End Date	30-04-2017

Employee Contributions & Pay - Year to Date values

⬅ Back   ➡ Continue

NI Number	Payroll Ref	This Pay Period Totals			Year to Date Totals			CARE Pay		Full Time Equivalent Pay
		EE Main	EE 50/50	ER	EE Main	EE 50/50	ER	Main Section	50/50 Section	
OL080001A	80001	60.00	0.00	120.00	60.00	0.00	120.00	1,000.00	0.00	12,000.00
OL080002A	80002	60.00	0.00	120.00	60.00	0.00	120.00	1,000.00	0.00	12,000.00
OL080003A	80003	60.00	0.00	120.00	60.00	0.00	120.00	1,000.00	0.00	12,000.00
Totals		180.00	0.00	360.00	180.00	0.00	360.00	3,000.00	0.00	36,000.00

⬅ Back   ➡ Continue

Full Time Equivalent Pay is required for all employees who were in the Local Government Pension scheme before 1 April 2014 (1 April 2015 for Scottish employers).

On subsequent returns i-Connect will use the YTD values and the This Pay Period figures to calculate the YTD values for the current month. Changing these values is only necessary if the YTD value calculated by i-Connect are different to your payroll values.

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Use the totals at the bottom of each column to check the values match against payroll

Employee Additional Contributions

We use this page to ask for any of the following additional contributions your employees are paying into the Local Government Pension fund:

- **AVCs**– any additional voluntary contributions to the in-house scheme provider

- **Other** - 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)

Enter the year to date additional contributions the employee has paid this pay period in the correct field

Use the totals at the bottom of each column to check the values match against payroll

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Employee Service

We use this page to tell the fund about changes in 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.

<table>
<tr><td colspan="6">

Online Return - Employee Service

ⓘ Online Return employee information successfully saved.

This is a summary of each employees whole-time / part-time status, with the effective date they became whole-time or started working those part-time hours.

If an employee has changed 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.

</td></tr>
</table>

Payroll Period End Date	30-04-2016

Employee Service

⬅ Back ➡ Continue

NI Number	Payroll Ref	Part Time?	Effective Date	Part Time Hours	Whole Time Hours
MX000003A	M300003	☑	03-01-2010	20.00	40.00
MX000004A	M300004	☐	04-01-2010		
MX000005A	M300005	☐	05-01-2010		
MX000006A	M300006	☑	06-01-2010	5.00	40.00
MX000012A	M300012	☑	02-01-2010	20.00	40.00
MX000013A	M300013	☑	03-01-2010	20.00	40.00
MX000014A	M300014	☐	04-01-2010		
MX000015A	M300015	☐	05-01-2010		
MX000022A	M300022	☑	02-01-2010	20.00	40.00
MX000023A	M300023	☑	03-01-2010	20.00	40.00
MX000024A	M300024	☐	04-01-2010		
WE203185B	1340547	☐	01-04-2016		

⬅ Back ➡ Continue

If the employee is part time, tick the 'Part Time?' tick box, 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.

If the employee works term time and not 52 weeks of the year, an adjustment must be made to their Part-Time Hours value. For example someone working 32 hours a week but only 44 weeks a year their part-time hours should be calculated as follows 32 /52 x 44 = 27.08/37.00.

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

i-Connect
Online Return Guide

Employee Personal Details

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 is displayed:

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

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Employee Contact Details

This page shows a summary 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 | | 30-04-2016 |

Employee Contact Details

Back   Continue

NI Number	Payroll Ref	Address	Email Address	Telephone Number	Mobile Number	Action
MX000003A	M300003	3 Care Lane Timperley				Edit
MX000004A	M300004	4 Care Lane Timperley				Edit
MX000005A	M300005	5 Care Lane Timperley				Edit
MX000006A	M300006	6 Care Lane Timperley				Edit
MX000012A	M300012	12 Care Lane Timperley				Edit
MX000013A	M300013	13 Care Lane Timperley				Edit
MX000014A	M300014	14 Care Lane Timperley				Edit
MX000015A	M300015	15 Care Lane Timperley				Edit
MX000022A	M300022	22 Care Lane Timperley				Edit
MX000023A	M300023	23 Care Lane Timperley				Edit
MX000024A	M300024	24 Care Lane Timperley				Edit
WE203185B	1340547					Edit

Back   Continue

Click the 'Edit' button to change employees' addresses, email addresses and telephone numbers:

The Edit Employee Contact Details page is displayed:

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

Online Return - Edit Employee Contact Details

Please enter the employee's new contact details.

Employee Contact Details

NI Number	WE203185B
Payroll Ref	1340547
Address Line 1	5 Coronation Street
Address Line 2	Weatherfield
Address Line 3	Salford
Address Line 4	Lancashire
Address Line 5	
Postcode	PP1 1LF
Email Address	
Telephone Number	0161 564 1244
Mobile Number	07777 456 789

Cancel   Save

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Employee Leavers and Opt Outs

Use this page to tell the fund about any employees' who have left your employment or who have opted out of the local government pension scheme:

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.

Payroll Period End Date	30-04-2016

Employee Leaver & Opt Outs

⬅ Back   ➡ Continue

NI Number	Payroll Ref	Date Left Scheme	Reason	Are they opting out?
MX000003A	M300003	30-04-2016		☑
MX000004A	M300004	30-04-2016	End of fixed term contract	☐
MX000005A	M300005			☐
MX000006A	M300006			☐
MX000012A	M300012			☐
MX000013A	M300013			☐
MX000014A	M300014			☐
MX000015A	M300015			☐
MX000022A	M300022			☐
MX000023A	M300023			☐
MX000024A	M300024			☐
WE203185B	1340547			☐

⬅ Back   ➡ Continue

'Date Left Scheme' field is either the date they left employment or the date they opted out of LGPS.

Use the 'Reason' field to give the reason they left your employment. 100 characters of text are available for the employee's reason for leaving.

If they opted out of LGPS tick the 'Are they opting out? box

Click the 'Continue' button when you are happy with the data entered to save the data and move to the next page.

Complete the Return

Nearly there, 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 'Complete' to complete the return submission.

Payroll Period End Date	30-04-2016

⬅ Back   ✖ Cancel   ✔ Complete

You have 3 options to choose from:

1	**2**	**3**
Click 'Back' to step back through each page of the online return.	Click 'Cancel' to remove all data entered for this payroll period and cancel the return. This option cannot be reversed.	Click the 'Complete' button to complete the return and proceed to the 'Latest Upload' page

Latest Upload Events Summary Page

The Latest Upload page will be displayed when the Online Return processing has completed (this may take several minutes). i-Connect identifies what needs to be sent to the Fund.

i-Connect
Online Return Guide

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	31-05-2016	31-05-2016	09-09-2016 16:08:33	Payroll Upload	Pending

Submission Statistics

Total Number of Payroll Members Tracked by i-Connect	12
Omitted Payroll Members (present on the last submission, and no leaver event processed)	0

Payroll Members submitted this period	12	Payroll Members in Error	0	Accepted for Processing	12
Total Pensionable Pay	£21,745.80	Total Employee Contributions	£1,450.76	Total Employer Contributions	£5,149.15
YTD Main Pay	£43,491.60	Total Main Contributions	£1,450.76		
YTD 50/50 Pay	£0.00	Total 50/50 Contributions	£0.00		
		Total EE-APC	£0.00	Total SC-APC	£0.00

Submitted By User	qatfreddo	Processed By User	

Events	Total	Pending	Submitted	Completed	Failures	Errors	Suppressed	Progress
New Starter	0	0	0	0	0	0	0	
Member Address Update	0	0	0	0	0	0	0	
Contributions	12	12	0	0	0	0	0	▭
Salary	12	12	0	0	0	0	0	▭
NI Contributions	0	0	0	0	0	0	0	
Member Details Update	0	0	0	0	0	0	0	
Service	0	0	0	0	0	0	0	
Opt In	0	0	0	0	0	0	0	
Opt Out	0	0	0	0	0	0	0	
Leaver	0	0	0	0	0	0	0	
Leaver Absence	0	0	0	0	0	0	0	
Re-enrolment	0	0	0	0	0	0	0	
Works Address Update	0	0	0	0	0	0	0	
Additional Contributions	0	0	0	0	0	0	0	
CARE Pay	12	12	0	0	0	0	0	▭

✔ Proceed   ✖ Cancel

Sending data to the Fund

Click the 'Proceed' button to send the data to the Fund or click 'Cancel' to cancel the upload process.

When you click 'Proceed', the upload status changes from 'Pending' to 'Submitted' to indicate 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 will also be updated):

Latest Upload

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

File Name	Period End Date	Expected Submission Date	Submission Date	Submission Type	Status
1C.POST2014_LGPS_20 _Members_File_BAU_30042014_Monthly.csv	30 April 2014	30 April 2014	11 July 2014 13:36	Payroll Upload	Submitted

Submission Statistics	
Total Number of Payroll Records	23
Payroll Members in Error	0
Accepted for Processing	23
Submitted By User	demoemployer
Processed By User	demoemployer

ⓘ Tolerance failures were detected and confirmed by the user to proceed with submission processing. Click here to view the failures.

Events	Total	Pending	Submitted	Completed	Failures	Errors	Workflow Errors	Progress
New Starter	3	0	0	3	0	0	0	
Member Address Update	23	0	22	1	0	0	0	
Contributions	23	0	22	1	0	0	0	
Salary	23	0	22	1	0	0	0	
NI Contributions	23	0	22	1	0	0	0	
Member Details Update	8	0	7	1	0	0	0	
Service	2	0	2	0	0	0	0	
Opt In	0	0	0	0	0	0	0	
Opt Out	1	0	1	0	0	0	0	
Leaver	1	0	1	0	0	0	0	
Leaver Absence	1	0	1	0	0	0	0	
Works Address Update	3	0	2	1	0	0	0	
Additional Contributions	22	0	21	1	0	0	0	
CARE Pay	22	0	22	0	0	0	0	

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

If the submission of the data has not finished within 5 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. You must login to i-Connect when you get this email 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 the i-Connect service desk.

Want to Know More?

Look at these guides

- **Reporting**
- **Login**
- **Onboarding**
- **File Upload**