Teachers' Pensions

Employer Responsibilities

Getting you started

As an employer for the Teachers' Pension Scheme, you have a number of responsibilities. This document will explain what these responsibilities are and help you to plan how to meet them. Remember that even if you have a Local Authority or payroll provider completing these tasks on your behalf, the responsibility that they're completed accurately and on time is still yours.

Data retention

We can't advise you on your data retention arrangements, however, you're obliged under the regulations of the Scheme to provide accurate, complete data on members who have/are employed by you, even if they no longer work for you. We've marked the tasks below where we may require such data from you with a *.

What do I need to do?

You need to review items below and ensure you or your payroll provider are completing the tasks. It's an interactive guide so each task can be ticked off as you complete them.

There are some tasks that need completing once, like registering for the Employer Portal, but some that need completing monthly. Keeping this document to hand will help keep you up to date on those tasks.

Employer Responsibility	**Actions:** Have you or your payroll provider completed this?	Done?
Employer Portal The Employer Portal is an online facility that allows you to securely transfer files, manage your members' details and administer the Scheme.	You need to register to use the Employer Portal. To do this you'll need to complete the delegation form and then forward it to epregistrations@teacherspensions.co.uk. The completed form will then be used to set up your access to the Employer Portal. All communications regarding the administration of the Scheme will be sent via the Employer Portal, so it's important that access is set up as soon as possible. If you'd like to find out more about the Employer Portal take a look at our guide.	☐
Contact webform details Once you have Employer Portal access, you'll need to complete the Employer Contact Details webform in order to make sure we're sending the right information to the right person. A primary contact must be specified on the Employer Portal account (this may be you, or someone else) and they're responsible for making sure we have up to date contacts (amongst other things).	There are several contacts we require from you. These include: • Primary contact • Service and salary contact • Monthly contributions contact • End of Year Certificate contact • Head of finance contact • Web forms contact • Monthly Data Collection contact. It's important to ensure that these contacts are checked regularly and updated when a new member of staff starts, as we issue different communications every month to different contacts within your establishment. If we don't have the correct contact details, the relevant person won't receive the necessary information.	☐

Employer Responsibility	**Actions:** Have you or your Payroll provider done this?	Done?
Providing Monthly Contributions Reconciliation (MCR) submissions You're required to provide service, salary, and contribution information via MCR on a monthly basis in order to update member records. To understand MCR in more detail, we'd recommend you take the time to look at the dedicated MCR section of our website and, in particular, the User Guide. If you need more information about MCR, please contact our MCR Team.	• Your MCR submissions and corresponding contribution payments need to be with us by the 15th of each month (i.e. May's service, salary and contribution information and associated payment needs to be with us by 15th June). The MCR submission can be created by either using the MCR Template, or by extracting the information directly from your payroll system. This must include all eligible members of the Scheme, even those members who've opted out and those who've come back into service. It must also include all relevant data for each member including changes in contract (i.e. full-time to part-time or vice versa), withdrawal indicators if a member has left an employment and where an employee has returned to work. The corresponding contribution payment must match the total value on your MCR submission and include the correct payment reference number for your submission. Any errors generated from your MCR submission will be returned to you via the Employer Portal. You'll then have 3 payroll months to return your amended errors back to us.	
	• As part of the MCR process, there's a number of notification and reminder processes that run to advise you of actions that need to be completed. These processes are: • Missing submission notification • Missing payment notification • Missing member notification • Outstanding error reminder • Uncorrected administrative National Insurance Number reminder. These processes send notification/reminders to the MCR Data Centre Mailbox in the Employer Portal, and are triggered at different times during a payroll month.	
	• The MCR missing submission notification process is triggered on the 4th working day before the 15th of each month and will pick up all MCR employers who've not yet made a submission. These employers are then issued a reminder message to their MCR Data Centre Mailbox. This process is repeated on the 16th and 18th of each month. If no submission has been received by the 19th of the month, the case is escalated to the MCR team to be chased manually.	

Employer Responsibility	**Actions:** Have you or your Payroll provider done this?	Done?
Providing Monthly Contributions Reconciliation (MCR) submissions (continued)	• The MCR missing payment notification process is triggered on the 16th of each month and will pick up all MCR employers who have made a submission but have not made corresponding payment. These employers are then issued a reminder message to their MCR Data Centre Mailbox. This process is repeated on the 18th of each month. If no submission has been received by the 19th of the month, the case is escalated to the MCR team to be chased manually.	☐
	• The MCR missing member notification process is triggered on receipt of your submission and will pick up any scheme members deemed as in 'active employment' by your establishment that aren't included in your submission. A report will be issued to you listing these scheme members for investigation. This process is repeated on the 16th and 18th of each month If the missing member are still identified on the 19th of the month, the case is escalated to the MCR team to be chased manually. To rectify missing members, you'll need to identify the reason the member has not been included and then you'll need to make the required correction to either remove the member from 'active employment' or submit the relevant data for that month. This must be done via a separate MCR submission.	☐
	• The MCR outstanding error process is run on the 17th of each month and will provide a list of all open error that require you to provide a fix. Full details of the errors correction process can be found in the MCR User Guide on our website.	☐
	• The MCR uncorrected administrative National Insurance Number routine is run on the 17th of each month and will provide a list of members who have an administrative National Insurance Number (starting QQ) and are approaching the deadline date for you to provide the actual National Insurance Number for that member. Full details of the administrative National Insurance Number process can be found in the MCR User Guide on our website.	☐

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Your obligation to members of the Scheme To provide information about the Teachers' Pension Scheme to all employees (new starters, leavers and existing members) and confirm that they're automatically members unless they opt out. There are some exceptions to the requirement to Auto Enrol.	• Contractually enrol all eligible new employees into the Teachers' Pension Scheme. You must inform us that this has taken place on the MCR template by completing the 'Enrolment Type' field on the row of data where the 'Start Date' is equal to the enrolment date. For members who wish to opt-out of the Scheme when they join, they must complete an Opt-out form. The best way for them to do this is via My Pension Online (MPO).	☐
	• You must also comply with your statutory Auto Enrolment duties. This requires you to assess your workforce at your staging date to check if they meet the status of 'eligible jobholder' by virtue of their age and pay. Those who are eligible jobholders and who aren't participating in the Scheme should be enrolled into the Scheme, even if they've previously chosen not to opt-out. When this exercise is complete, you must inform us that this has taken place on the MCR template by completing the 'Enrolment Type' field on the row of data where the 'Start Date' is equal to the auto enrolment date. For members who wish to opt-out of the Scheme when this auto enrolment takes place, they must complete an Opt-out form. The best way for them to do this is via My Pension Online (MPO).	☐
	• All members must be informed that they have 12 months from entering pensionable service to transfer pension credits from a previous scheme into the Teachers' Pension Scheme.	☐
	• We'll send a report each month listing all new starters. Where we've an email address, or the member's registered for MPO, we'll provide the member with starter information. Where we don't hold an email address or the member isn't registered for MPO, it's your responsibility to provide new employees with this link to the member guides.	☐
	• Where we don't hold an email address or the member isn't registered for MPO, it's your responsibility to provide any leavers with a copy of the leavers factsheet and use the resources on our Starters and Leavers page on our website for more support. Where we have an email address or the member is registered for MPO, we'll provide the member with leaver information.	☐
	• Advise members of the opportunities to increase their pension and the deadline dates for those in the career average arrangement for Faster Accrual and Buy Out.	☐
	• Use the advising members section on our website for further help and guidance, which includes information regarding the eligibility of members, different member types and what you need to do if a member's circumstances change such as family leave, divorce and sick leave.	☐

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Employer Responsibility	**Actions:** Have you or your Payroll provider done this?	Done?
Your obligation to members of the Scheme (continued)	• Notify us of all new starters and any leavers as they occur. This can be done through your MCR submissions each month.	☐
	• Encourage members to sign up for MPO so they can view their Benefit Statement, update their personal details and complete forms. You can use the MPO report, which will be sent to you via the Employer Portal, to identify members who still need to register.	☐
Ensure contributions are deducted and submitted promptly and accurately each month	• You must ensure that contributions are accurately deducted from all eligible members of the scheme. This must be done as soon as you are aware of the members pay and must follow the calculation rules outlined in the MCR User Guide.	☐
Complete the End of Year Certificate (EOYC) and upload via the Employer Portal	• We'll email you in April regarding your EOYC. You must then complete and upload the EOYC via the Employer Portal, by 31 May each year. A copy of your Certificate must be printed off and signed by your Financial Officer and issued to your appointed auditor for the relevant checks to be completed. The auditor appointed will require all financial data by 30 June each year. The auditor must follow the certification guidance provided by us when conducting the audit and return the signed audited form by 30 September each year if you're a not a Local Authority establishment, or 30 November if you're a Local Authority. It's important to note that the auditor cannot be an employee of the establishment. More information about the EOYC process can be found on our website.	☐
Completing member application forms	• When a member submits an application form (i.e Retirement form/Opt-out form), it's your responsibility to ensure it's correctly completed. These can be received either via the Employer Portal or as a paper form from the member. If they're submitted via the Employer Portal, you'll receive an email notifying you of the application the member has submitted. The submitted online Retirement forms will be found under the Task Manager section of the Employer Portal. If a member has completed a paper form, these can be uploaded onto the Employer Portal. * When a member no longer employed by you retires, you may be asked to review service gaps for that member. You're required to review the service and provide any updates to ensure it's correct.	☐

Employer Support

There's plenty of support available to help you administer the Scheme and you'll find most of it on our website.

Contact us

We've also a dedicated Employer Support Team who is here to help you with any enquiry you may have.

You can contact them by telephone on 0345 300 3756, Monday to Friday, 8.30am – 6pm or by email.

If you've got questions regarding your MCR submissions, you can contact our dedicated MCR team by telephone on 0345 300 3756 (option 1 then option 4), Monday to Friday, 8.30am - 6pm or by email.

We also provide updates on our social media pages throughout the month to keep you as up to date as possible.

Follow us on social media

Resources - MCR User Guides and Factsheets

There is lots of information available to assist you with the MCR. Two key documents we recommend you read is the MCR User Guide and MCR Template Guide that can be found on our website.

Training

We offer a series of dedicated training opportunities for you to participate in, as we understand how busy it can get at times so we provide online webinars, meaning you can learn about the Scheme without leaving your desk. Keep up to date with training through our online training calendar.

Timetable & timelines

There are some key dates you need to be aware of for administering the Scheme.

15th of each month	MCR Submission and associated Contribution Payment are both due (where the 15th falls on a weekend these will be due on the last working day prior to this)
April	EOYC issued.
31 May	Unaudited EOYC deadline for completion and return.
30 June	EOYC to be made available to auditor.
30 September	Audited EOYC to be completed and returned (Non-LAs only).
30 November	Audited EOYC to be completed and returned (LAs only).

Employer Bulletin

It's important to keep up to date with all our latest news and updates. You should also watch out for our Employer Bulletin which we email each month. You can also find them on our website.