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 service and salary submissions If you haven't already on-boarded to Monthly Contributions Reconciliation (MCR) then the only way to provide service and salary submissions is through the Monthly Data Collection (MDC) process. You're required to do this on a monthly basis in order to update member records. To understand MDC in more detail, we'd recommend you take the time to look at the dedicated MDC section of our website and, in particular, the Guidelines & Specification Document. If you need more information about MDC, please contact our MDC Team on 0345 3003756 (option 1 and then option 1) or email us. If you'd like to find out more about MCR and the on-boarding process then take a look at our website.	• Your MDC submissions need to be with us by the 7th of each month (i.e. May's service and salary information needs to be with us by 7 June), this can be provided by either using the MDC 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. Any errors generated from your MDC submission will be returned to you via the Employer Portal. You'll then have until the last working day of the same month to return your amended errors back to us.	☐
	• As part of the MDC process, there's a Reminder and Checklist report, which can be found on the Employer Portal. This automatically identifies any non-submitted service from your MDC submission.	☐
	• If your submission doesn't contain a service record for each member deemed as in 'Active Employment', we'll contact you on the 14th of each month with the Reminder and Checklist report for investigation. You'll need to identify the reason the member has not been included and then you'll need to correct the service record accordingly. This can be done by updating the MDC Checklist file which can be found in the 'Download a file' section on your Employer Portal by selecting 'Missing Service' from the drop down selection, and uploading it.	☐
	• If by the 21st of the month we still identify non-submitted service for any members deemed as in 'Active Employment' in the previous month, a further email and MDC Checklist file will be issued.	☐
	• If by the 28th of the month we still identify non-submitted service, one of our MDC team may be in contact to offer support in supplying this.	☐
	• * If and when gaps are found in a member's service, you'll need to confirm if that gap is correct or supply the historic information to correct it. This could come at any time during the member's employment with you or after.	☐
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 enrolled unless they opt out.	• Contractually enrol all new members into the Teachers' Pension Scheme. For members, who wish to opt-out of the Scheme, 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 have an email address, or the member is 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.	☐

Employer Responsibility	**Actions:** Have you or your Payroll provider done this?	Done?
Your obligation to members of the Scheme (continued) 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.	• 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 – we've a Starter Factsheet and New Starter Guide which can help with this.	☐
	• 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.	☐
	• Notify us of all new starters and any leavers as they occur. This can be done through your MDC 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	• Collect and submit contributions promptly and accurately by the 7th of the month.	☐
	• Submit the accompanying Monthly Contributions Breakdown form (Paying-in slip) promptly and accurately, also by the 7th of the month.	☐
	• For more information on deductions view our Contributions 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.	☐

Teachers' Pensions

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.

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 - HR & Payroll Guide

Two key documents we recommend you read are our HR Guide and Payroll Guides which help you administer the Scheme and support members.

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.

7th of each month	Contributions and Breakdown Form & MDC submissions are both due (where the 7th falls on a weekend these will then 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.