

Mid-month MCR Service Updates and Corrections

We've recently received an increase in queries from employers asking about providing mid-month service updates and corrections using the MCR submission method.

This is still possible using MCR, but you'll need to follow a specific method in order to ensure that you don't inform us that those contributions you've previously deducted are to be paid again.

This method can be used for various reasons but some of them are as follows:

- Provide a withdrawal indicator where this was missed or you were informed late of the member leaving
- Provide an enrolment where this was missed or you were informed late of the member's enrolment
- Provide an update to the service or salary details only where the contribution values haven't changed
- Correct an employer warning error where the contribution values were deducted correctly, but the method that was used to inform Teachers' Pensions of this was incorrect.

To do this, you'll need to follow this process:

1. Populate the record action field with "U" to inform us that you're updating a piece of service that was previously provided
2. If you're correcting a warning error we've previously notified you of, please provide the error code in the case number field
3. Provide the member's correct or updated personal information
4. Provide the member's updated service details
5. Provide the member's updated salary details
6. If the member is on family or occupational sick leave for the period of service being provided, populate the status indicator with "FL" or "OS" respectively
7. Populate the "Contribution calculation method" with "WE" to inform us you're performing a "When Earned" calculation. This means that you're recalculating the contributions that were previously deducted in the current period. As no adjustments are being made to this, we can use this method to note this is the case.
8. Provide "Actual Pensionable Pay in the Pay Period", "Pensionable Overtime in the Pay Period" and "Notional Pensionable Pay in the Pay Period" as needed with the correct values that should have originally been provided
9. Recalculate the "Employer Contributions", "Member Contributions" and "Member Contributions Tier" based on the updated information from step eight

- 10. Input the “Employer Contributions – Previously Paid” and “Member Contributions - Previously Paid” to equal the values provided in step nine respectively
- 11. Input the “Employer Contributions – Adjustment” and “Member Contributions – Adjustment” as “0.00” to show that no adjustments are being made
- 12. If you have deducted any additional contributions, repeat steps 9, 10 and 11 for the relevant contribution deduction
- 13. Check that the data has been provided correctly
- 14. Proceed to Section B and produce the relevant totals, these should be “0.00”
- 15. Produce a .csv file from the MCR Template and upload this via the Employer Portal
- 16. You’ll receive a notification to your MCR data centre mailbox of the successful submission and that no contributions are owed.

An example of how this method can be used has been provided below:

In January 2022, a row of service was provided and the pensionable overtime was incorrectly included in the actual pensionable pay figure notified to Teachers’ Pensions.

The original service provided was as follows:

Insert Line		Delete Line		Find Error		Find Waming					
Record Action	Case Number	Teachers' Pensions Reference Number	National Insurance Number	Forename(s)	Surname	Local Authority Number	Establishment Number	Role Identifier	Enrolment Type	Start Date	End Date
A		1234567	JA123456A	Example	Example	123	1234	1/1		01012022	31012022

Full-time/ Part-time Indicator	Annual Full-time Salary	Part-time Earnings	Overtime	Actual Pensionable Pay in the Pay Period	Employer Contributions	Member Contributions	Member Contribution Tier (%)
FT	28000.00		200.00	2533.33	599.89	187.46	7.4

- 1. An add line provided in the January 2022 submission
- 2. The Actual pensionable pay value provided is £2533.33 which contains £2,333.33 in actual pensionable pay and £200.00 in pensionable overtime. However, the £200.00 relating to pensionable overtime should have been provided in the “Pensionable Overtime Paid in the Pay Period” field.
- 3. As a result of this, we’ve annualised the “Actual Pensionable Pay in the Pay Period” value to calculate the member contribution tier. As £2,333.33 should have been annualised, the members actual monthly earnings, the tier used, tier 1 7.4%, is correct but the information we’ve been provided with would indicate tier 2, 8.6% should have been used.

- 4. When this was submitted, MCRD8c and MCRD9c errors were produced to state the member’s contributions and member contribution tier provided are incorrect. This has been shown in the original MCR submission as the Member Contributions and Member Contribution Tier field are amber to note a warning error. An error code of 44548791 was provided in the error file received from Teachers’ Pensions.
- 5. In this scenario, the deductions made were correct but the way the information has been provided isn’t.

This can be corrected using the mid-month when earned method as follows:

- 1. Create an MCR submission using the MCR Template
- 2. Populate the “Record Action” with “U” to state you are updating a piece of service previously submitted
- 3. Populate the “Case Number” field with the relevant error code, in this instance it was “44548791”.
- 4. Input the member’s personal information
- 5. Input the member’s service and salary information for the January 2022 period. If there are any changes to this, then these can be supplied provided there are no amendments to the contributions
- 6. Input the “Actual Pensionable Pay in the Pay Period” value as £2,333.33, the value previously provided minus the pensionable pay relating to overtime
- 7. Input the “Pensionable Overtime Paid in the Pay Period value as £200.00, the value that should have previously been provided in this field
- 8. Input the “Employer Contributions”, “Member Contributions” and “Member Contribution Tier” previously provided
- 9. Input the “Employer Contributions – Previously Paid”, “Member Contributions – Previously Paid” to match those input at step 8
- 10. Input the “Employer Contributions – Adjustment” and “Member Contributions – Adjustment” values as “0.00”.
- 11. Validate this information and check no warning errors have been produced
- 12. Check the values on Section B are all 0.00
- 13. Produce a csv file and submit this via the Employer Portal
- 14. You’ll receive confirmation of this submission being successful in your MCR data centre mailbox.

This would now be supplied as follows:

Insert Line		Delete Line		Find Error		Find Waming					
Record Action	Case Number	Teachers' Pensions Reference Number	National Insurance Number	Forename(s)	Surname	Local Authority Number	Establishment Number	Role Identifier	Enrolment Type	Start Date	End Date
U	44548791	1234567	JA123456A	Example	Example	123	1234	1/1		01012022	31012022

Full-time/ Part-time Indicator	Annual Full- time Salary	Part-time Earnings	Overtime	Calc Method for Contribution Tier	Actual Pensionable Pay in the Pay Period	Pensionable Overtime Paid in the Pay Period	Employer Contributions	Member Contributions	Member Contribution Tier (%)	Employer Contributions - Previously Paid	Member Contributions - Previously Paid	Employer Contributions - Adjustment	Member Contributions - Adjustment
FT	28000.00		200.00	WE	2333.33	200.00	599.89	187.46	7.4	599.89	187.46	0.00	0.00

Fields that don't contain a value after the Role Identifier have been removed for illustration purposes.

You can submit multiple rows for multiple members within this mid-month when earned file provided no contribution adjustments are required.