

Payroll Provider checklist

What do I need to do?

As an employer for the Teachers' Pension Scheme, you have a number of responsibilities. This document will explain what you'll need to do if you're planning to use a Payroll Provider to support you in your administration of the Scheme, or switching providers.

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.

Therefore, all warnings or errors must be sent to you even if your Payroll Provider sends the submission.

Employer Responsibility	Actions: Have you completed this?	Done?
<p>Employer Portal</p> <p>The Employer Portal is an online facility that allows you to securely transfer files, manage your members' details and administer the Scheme.</p>	<ul style="list-style-type: none"> Update your establishment's contact details on your Employer Portal so we know who your chosen provider is If you'd like to find out more about the Employer Portal take a look at our guide. 	
<p>New Delegation form</p>	<ul style="list-style-type: none"> Ensure new Delegation forms are provided - these need to include the Employer Portal Delegation form and the Multi Academy Trust Delegation form if applicable They should be sent to EPRegistrations@teacherspensions.co.uk to be processed Your Delegation form needs to state that your establishment is linked to the new Payroll Provider's 750 number (if they have one). 	
<p>Monthly Contributions Reconciliation (MCR)</p>	<ul style="list-style-type: none"> Ensure an updated On-boarding form is provided to change the Payroll Provider's contact details for your submissions If you're submitting using MCR, you must choose a provider who can support this You'll also need to pass on the Role Identifiers used within your establishment to the new provider, as these need to remain the same. 	
<p>Monthly Data Collection (MDC)</p>	<ul style="list-style-type: none"> If you're using MDC to submit data, choose a provider who can support MDC whilst the on-boarding pause is in place. 	

Employer Responsibility	Actions: Have you completed this?	Done?
<p>Data retention</p>	<ul style="list-style-type: none"> • When a contract comes to an end with a provider you need to ensure that you request all of your payroll and service data • The employer remains responsible for the upkeep of the member records and if there are any queries about the member it's the employer that will need to ensure these are checked and updated • Providers will only keep your data for a short period of time once a contract has terminated. 	
<p>Errors</p>	<ul style="list-style-type: none"> • Check for any outstanding errors as these will stay with you as the employer and will need passing to your new provider if they require amendments through payroll • If your new Payroll Provider will be submitting your service under their 750/XXXX account in the portal, they'll require delegated access which covers the months the service errors relate to • Alternatively, correction files can be submitted directly through the establishment/trust account on the employer portal. 	
<p>Local Authority</p>	<ul style="list-style-type: none"> • A Local Authority is deemed to be the employer of all the teachers that are employed in the maintained schools that fall under them and are therefore required to submit all the returns and contributions to us • If a maintained school outsources to a third party provider, the submissions and contributions must still be provided to us via the Local Authority • The maintained schools or their providers can't submit them directly to Teachers' Pensions • Any maintained schools that use third party's must ensure that the returns and contributions are sent to the Local Authority promptly in order for them to send it over to us within the appropriate timescales. 	