

Monthly Contributions Reconciliation (MCR) checklist

To help you prepare to on-board to MCR, we've created a simple checklist for you. The following steps are designed to ensure that your MCR journey starts off as smoothly as possible. A member of our team will contact you prior to on-boarding to make sure the essential checks have been completed and you're ready to on-board.

Essential checks

Check with your payroll / software provider when they'll be ready

If you're using a provider, make sure they have the training and capability required for you to on-board.

If you're a Local Authority and have maintained schools that use third party providers for their payroll, each of these has to have the ability to provide you with the required data for you to on-board.

Make sure all delegation details are up to date

If you use a payroll provider, we need to know their most up to date details. They need to complete a [Delegation form](#) to allow them access to the [Employer Portal](#).

Check your contact details and data centre access are correct

Log in to the Employer Portal to check and update the [contact details](#) we currently hold for those who'll be administering MCR.

Read our MCR Guide

This is a [comprehensive guide](#) covering the process, how to complete section A and B, and submission examples. It's a must read before you on-board and will be a step our team will check you've completed.

Read our On-boarding Guide and complete the On-boarding form

You can find both the [guide](#) and the [form](#) on our website. On your form you'll need to select the month in which you'd like to on-board to MCR, or select the month we've allocated for you to on-board.

Complete the MCR training

Staff who'll provide information for MCR will need to be aware of any new changes introduced. It's essential to attend our [three training webinars](#) covering the process, data sets and contribution methods, and a run through of scenario examples.

Ensure the data cleanse exercises outlined in the On-boarding Guide are completed

This is essential in helping us amend any variances in member information between us and your payroll system and simplifies the on-boarding process.

The On-boarding Guide is available on our [website](#). Leading up to your on-boarding date, you'll need to download your membership listings report from your Employer Portal, which can be found in the '[Reports](#)' section.

Test your MCR submission

You'll need to test that the data you're going to provide to us when you start to make your MCR submissions is correct and accurate. You can do this by using the MCR template.

This contains extensive data validation and by populating it with your data, you'll be able to identify any errors before you start making live submissions.

This must be done for all types of data sources (extract from payroll system, extract from payroll provider, manually extracted, etc.) and for at least one month's worth of data, before you on-board. It'll be a step our team will check you've completed.

Further support

Keep an eye out for our MCR emails

From the point you send us your On-boarding form, we'll send you confirmation and re-minder emails to support and guide you through the process of joining.

Keep up to date with MCR

It's a good idea to familiarise yourself with the documents and dedicated resources you'll need before you reach your on-boarding date. Please take some time to look over the following:

- The [MCR Template](#) and [Template User Instructions](#)
- Our monthly [Employer Bulletin](#), to keep up to date with information on MCR
- Our [MCR Bulletin](#), emailed to you with a focus solely on MCR
- The [dedicated MCR webpages](#)
- Follow us on [Social Media](#).

For further help or support with MCR, [visit our contact options](#).