

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.

Sign up to our webinar - An introduction to MCR

The first in our series of online training modules to help you understand the basics of MCR. Book your place via our website.

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

If you're using services of a provider, you'll need to ensure that they have the training and capability required for you to on-board.

Make sure all delegation details are up to date

If you use the services of a payroll provider, you'll need to ensure that we're informed of their most up to date details by completing a [Delegation Form](#). This is so that we can allow them access to the Employer Portal.

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

You can find both on our [website](#). On your form you'll select the month in which you'd like to on-board to MCR.

Keep an eye out for our MCR emails

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

Check your contact details and data centre access are correct

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

Sign up to the enhanced MCR webinar

A more in depth look into how MCR will work for you and prepare you for using the process. We'll send you an invite by email in the time leading up to your on-boarding month.

Prepare your staff

Staff who'll provide information for MCR will need to be aware of the changes that will be coming in. We've reading material available on our website, designed to give you all the information needed.

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:

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

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. Log into your Employer Portal and select "Reports" to download this.



For further help or support with MCR, you can contact our MCR team via email.

 mcr@teacherspensions.co.uk

