



Employer Webform Enhancement

Introduction

Updates have been made to how service is added to webforms. It's now easier to add multiple lines and webforms will automatically split service at relevant dates. These changes have been made within the following forms:

- Retirement Webform
- Repayments Webform
- Transfer In Webform

The changes won't be made within the Certificate of Re-Employment webform at this time due to the complexities with the service routine which require further development.

Adding service

Any webform that requires you to enter service information (other than the Re-employment Certificate) will now automatically generate a table of service lines on the service entry page. You'll then need to complete these lines with the relevant information. The system will generate the table of service lines based on two dates; the dates used depend on the webform:-

Retirement webform / Repayment webform

- The last day of service held on the record
- The date input by the member as their last day of service (which you'll have already confirmed)

Transfer In webform

- First day of pensionable service (as input by you)
- Date of Transfer In application.

Once the appropriate service lines have been generated, you can then review and edit them as appropriate.

Each line will begin on the 1st of the relevant month, unless the period started part way through the month. In addition, the month of April will be automatically split at 05/04 (i.e. a period covering 01/04 - 30/04 would be split into 01/04 - 05/04 and 06/04 - 30/04).

For the Retirement and Repayment webform, the last line that's generated will always contain a Withdrawal Indicator (W). This isn't editable on the Retirement form, but is on the Repayment webform.

Example:

Member's Service Lines

To help process retirement applications as quickly as possible please provide service and salary details in the table below. Details should be provided from the last day of teaching service held on our records of 31/03/2014 up to the last day of teaching service input by the member of 31/03/2015.

Please note: Service for April is split between 01 - 05 April and 06 - 30 April, otherwise Annual Service Returns or MDC service returns with that split which are provided at a later date may produce an error if the service start and end dates don't match the period already held on the record.

	Full/ Part time (F/P)	Start date (dd/mm/yy)	End date (dd/mm/yy)	Full-time annual salary rate (£) (inc. Pensionable Allowance)	Actual part- time salary paid (£)	Days Exc	Part Time Indicator (PTR/PTI)	Overtime (Gross Amount in £'s)	School No. or Employment code	Withdrawal Indicator (W)
Delete	<input type="button" value="v"/>	01/04/2014	05/04/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	06/04/2014	30/04/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/05/2014	31/05/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/06/2014	30/06/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/07/2014	31/07/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/08/2014	31/08/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/09/2014	30/09/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>
Delete	<input type="button" value="v"/>	01/10/2014	31/10/2014	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="v"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Adding and deleting service buttons

You can amend the automatically generated service lines as appropriate using new 'Add Line' and 'Remove Line' options.

For 'Add Line', you'll be asked to enter the start date of the new service line and then press 'Add Line'. This will automatically split the existing service lines at the date entered. You'll be unable to enter a date that falls outside of the period that originally determined the generated service lines. You'll need to split the line of service if there's a change to the full-time salary rate or if a member goes from full-time to part-time or vice versa part way through the month. If the added line spans 5 April, the system will automatically split the service at this date.

To add a new service line enter a start date between 01/04/2014 and 31/03/2015.

New Service Line Start Date

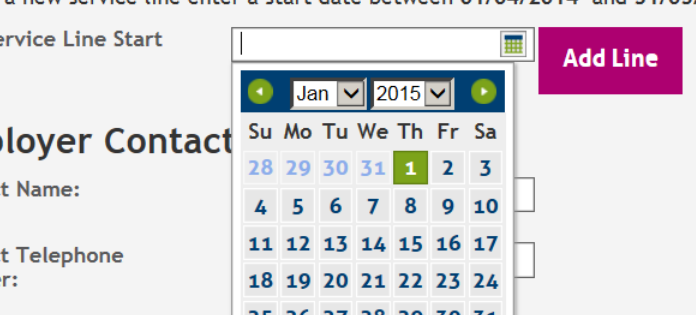
Employer Contact

Contact Name:

Contact Telephone Number:

Contact Email Address:

Add Line



The screenshot shows a web form for adding a new service line. At the top, a text instruction states: "To add a new service line enter a start date between 01/04/2014 and 31/03/2015." Below this is a label "New Service Line Start Date" followed by a date picker widget. The date picker shows "Jan" for the month and "2015" for the year. To the right of the date picker is a red button labeled "Add Line". Below the date picker is a section titled "Employer Contact" in bold. Under this title are three labels: "Contact Name:", "Contact Telephone Number:", and "Contact Email Address:". To the right of these labels is a calendar widget. The calendar shows the month of January 2015. The days of the week are listed at the top: Su, Mo, Tu, We, Th, Fr, Sa. The dates are arranged in a grid. The date "1" is highlighted in green, indicating the selected start date. The calendar widget also has navigation arrows and a small icon in the top right corner.

	Full/ Part time (F/P)	Start date (dd/mm/yy)	End date (dd/mm/yy)
Delete	<input type="button" value="v"/>	01/04/2014	05/04/2014
Delete	<input type="button" value="v"/>	06/04/2014	30/04/2014
Delete	<input type="button" value="v"/>	01/05/2014	31/05/2014

The 'Delete Line' will appear next to each generated service line. When pressed, you'll be asked to confirm if you want to delete that line. If you delete the latest service line (i.e. the service line which ends on the 'Last Day of Service' date entered by the member) you won't be able to submit the form until a service line that goes up to the 'Last Day of Service' has been entered.

Changes to required information

The information that's needed for each service line has been amended, so you no longer need to provide as much information.

The following fields are required:

- Fulltime/Part-time
- Start Date
- End Date
- Full-time Annual Salary
- Part-time Annual Salary
- Days Excluded
- Withdrawal Indicator
- Special Class
- Overtime
- School or Establishment Number/Employment Code

The following fields have been removed:

- Salary Scale
- Safeguarded Salary
- London Allowance
- Social Priority
- Supplement.

'Special Class' changed to 'Part Time Indicator'

The 'Special Class' heading has now been changed to 'Part Time Indicator (PTR/PTI)'. The drop down options - that were previously '7' and '8' - have been changed to 'PTR (Part-time regular)' and 'PTI (Part-time irregular)':

	Full/ Part time (F/P)	Start date (dd/mm/yy)	End date (dd/mm/yy)	Full-time annual salary rate (£) (inc. Pensionable Allowance)	Actual part- time salary paid (£)	Days Exc	Part Time Indicator (PTR/PTI)	Overtime (Gross Amount in £'s)	School No. or Employment code	Withdrawal Indicator (W)
Delete	P <input type="checkbox"/>	01/04/2014	05/04/2014				<div>PTR PTI</div>			<input type="checkbox"/>

School or Employment Code Validation

The 'School No. or Employment Code' field now requires you to enter the full seven digit number of the establishment for each service line. It must include the '/' after the first three digits LEA number, for example 123/4567. This is because new validation has been added to the form to determine if the code entered is valid. When the form is saved, the establishment number entered is checked to make sure it's a valid establishment number/employment code. If the number isn't valid, you'll receive an error explaining why the number is not valid.

Local Authority

A Local Authority user can enter the establishment code for any maintained school underneath that LA. They cannot submit the number for the overall LA (for example 841/0000) and will receive an error if they try to do so.

Academies/Independent Schools

Academy and Independent School users can only submit their own establishment code.

Multi Academy Trust (MAT)

If a member is employed directly by a MAT and not at an individual academy within the Trust, this can be recorded under the MAT number, i.e. 751/0001. Where a user does enter a number which begins with 751, a message will pop-up in real time that tells you that a 751 number should only be entered if the member is employed directly by the MAT.

Withdrawal Indicator

For Retirement and Repayment webforms the last line of service that's automatically generated by the form will have a 'Withdrawal Indicator' populated by default.

Error Validation and Highlighting

If you enter invalid data into the form, this will be brought to your attention in two different ways:

- A list of errors that have been found by the validation will appear in a yellow box above the service lines table. Where the same error has been found on multiple lines, the error will only appear once but will state which lines it has been found on.
- The field on the form that contains the error/invalid data will be highlighted in red. Upon hovering over it, you'll be able to see some guidance on why the error has appeared.

The below screenshot illustrates both methods of displaying errors:

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The following errors were found:

- Full / Part time field must have a value selected
Lines Affected: 01/06/2015
- Full time salary must contain a numeric value in whole pounds
Lines Affected: 01/09/2014, 01/04/2015, 01/05/2015, 01/06/2015
- School Number/Employer Code must be entered
Lines Affected: 01/09/2014, 01/02/2015, 01/04/2015, 01/05/2015, 01/06/2015
- '+' Days Excluded are not valid for Full time lines
Lines Affected: 01/09/2014
- Days Excluded cannot exceed the number of days in the period
Lines Affected: 01/10/2014
- Overtime cannot be greater than 50% of contributonal earnings
Lines Affected: 01/01/2015
- Part time salary is not valid for a Full-time line
Lines Affected: 01/09/2014, 01/02/2015
- Part time indicator should be left blank for a Full time line
Lines Affected: 01/02/2015
- A value must be entered into either Part-time Salary or Days Excluded, but not both
Lines Affected: 01/11/2014, 01/12/2014
- Part time Salary must be entered as whole pounds

Lines Affected: 01/04/2015
- Days Excluded must be 3 numbers or a '+' and 2 numbers
Lines Affected: 01/05/2015
- Part time indicator cannot be left blank for a Part-time line
Lines Affected: 01/11/2014, 01/04/2015, 01/05/2015
- A service gap requires the Withdrawal indicator to be checked on the previous line
Lines Affected: 01/04/2015, 01/05/2015

The fields are highlighted below.

Delete	Full/ Part time (F/P)	Start date (dd/mm/yy)	End date (dd/mm/yy)	Full-time annual salary rate (£) (Inc. Pensionable Allowance)	Actual part- time salary paid (£)	Days Exc	Part Time Indicator (PTR/PTI)	Overtime (Gross Amount in £'s)	School No. or Employment code	Withdrawal Indicator (W)
Delete	F	01/09/2014	30/09/2014	aa	123	+80			a	<input type="checkbox"/>
Delete	F	01/10/2014	31/10/2014	123456		80			1234	<input type="checkbox"/>
Delete	P	01/11/2014	30/11/2014	1234567	1234568	10			1234	<input type="checkbox"/>
Delete	P	01/12/2014	31/12/2014	1234567			PTR	500000	1234	<input type="checkbox"/>
Delete	F	01/01/2015	31/01/2015	1234567				500000	1234	<input type="checkbox"/>
Delete	F	01/02/2015	28/02/2015	1234567	1234		PTR			<input type="checkbox"/>
Delete	P	01/04/2015	05/04/2015		aa					<input type="checkbox"/>
Delete	P	01/05/2015	31/05/2015			aa				<input type="checkbox"/>
Delete		01/06/2015	30/06/2015							<input type="checkbox"/>

To add a new service line enter a start date between 01/09/2014 and 30/06/2015.

New Service Line Start Date

Add Line

Service checks

The following service checks have been introduced:

1. You can't add a service line where the 'Start Date' does not fall between the first day of the requested service period and the last day of the requested service period. If the start date falls outside of this period, an error will be displayed.
2. You can't add more than one line of service covering the same period.
3. If you delete a line of service creating a gap in service, a withdrawal indicator must be entered onto the line of service prior to the gap; otherwise an error will be displayed.

Last Service Line on Hartlink Record Contains 'W' Indicator

For the Retirement and Repayment webforms, the system will generate service lines for you to complete based on:

- The last day of service we hold on our records
- The last day of pensionable service as input by the member

However, if the last day of service on our records contains a 'W' indicator then it may be that the member has a break in service. Where this is the case, you'll be given a field to indicate when the member came back into service:

Retirement Application

Last Date of Service and date of birth

We need you to verify the following information from the members application.

Last date of pensionable service: 30/04/2017

The teacher has entered their last day of pensionable service as above.

If the last day of pensionable service shown is incorrect, please select the "NO" box below and submit the form.

The member will then be informed that their application has been rejected as the last date selected by them is incorrect.

The member will be asked to re-apply for their retirement benefits providing the correct details. As this information can affect the retirement options provided to the member and the calculation of their retirement benefits, it's vital that this date is correct.

For this reason, it may be helpful if you could contact the member informing them of the correct date to input.

Please confirm that the date is correct: ☒ Yes

Currently we hold service for this member up to 31/07/14 and we have been informed that they withdrew from service at this point, please confirm the members first day of pensionable service after this date.

Date Teacher recommenced service:

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The service lines that're generated for you to complete in this instance will instead be based on:

- Date employee recommenced service
- Last date of pensionable service

Transfer In Webform - Existing Service

When you enter service on the Transfer In Webform and submit it, if any of the service covers a period that is already held by us, our records will be updated with service entered on the form. This is because this information is deemed to be more up to date.