Teachers' Pensions

Employer portal guide

December 2023

Contents

Introduction to the Employer Portal

The Employer Portal's for you as data holders (such as employers and Payroll/Software providers) to securely send data about Scheme members to us.

It's also the place to complete your half of member online application forms, such as Retirement applications.

Each user is given a unique account with access to the Employer Portal and won't be able to access any other user's account*. Because of this, passwords mustn't be shared with colleagues.

When a user no longer requires access to the Employer Portal, it's your responsibility to inform us immediately.

New login details should then be requested for any replacement.

*If you're a large data holder and require multiple user access, you may wish to create a global email address for webform notifications to be issued to.

This has the advantage of providing a central contact point which multiple users within the establishment can be given access to, removing the problem of work remaining untouched in the case of absence.

How to register

Before data can be sent, you're required to register to use the Employer Portal, following which we'll issue confidential password and PIN details.

If you look after more than one establishment, you'll need to include the details of all establishments on your Delegation form when registering. We'll then make sure you've got access to all the data you need.

To register please complete and return our Delegation form.

Requests to register should be emailed to epregistrations@teacherspensions.co.uk

Once registered, it's good practice to access your account each day to check for incoming information/applications from us or members employed by you.

Log in and account details

How to log in

1. Open your preferred web browser and go to our Employer Hub
2. Click on 'Employer Log In' and enter your login name (email address) and password, then click 'Log In'
3. Enter the appropriate numbers from your PIN as requested, then click 'Log In'
4. You'll be presented with a Data Responsibilities pop up, read through this, tick the box and click 'OK'
5. You're now successfully logged in to the Employer Portal.

IMPORTANT

When you log in for the first time, you'll be forced to change your password and PIN, as well as create a security question. Please follow the on-screen instructions. You'll also be asked to set up your Multi Factor Authentication (MFA) method. You'll have three different options to confirm your identity – SMS, Email or through the Authenticator App. Depending on your preferred option, you'll be sent a one-time passcode via that method. The next time you log in you won't be asked for your PIN, but instead the one-time passcode from your preferred method.

Please note – The only number and email that can be used for MFA are the ones on your record. If this is incorrect, please update them via the Employer Portal. If you've any issues with logging in or MFA then please contact us.

How to change your account details

To change all your account details (password/ PIN/security question/MFA preference), click the appropriate link from the 'Useful Links' section in the Dashboard.

Please note:

- The temporary password and PIN sent to you when resetting your details are only valid for 24 hours
- The temporary one-time passcode you receive when logging in to your account is only valid for 15 minutes, so make sure you're ready to log in when requesting it
- Your account will auto lock due to periodic expiry if you don't log in for 90 days.

If you're locked out of your account due to inputting the incorrect details, you can use our unlock form on the Employer Portal login page to reactivate your account or our password/pin reset tool to obtain new login details.

If you're locked out of your account due to inactivity, you'll need to contact us to get your account reactivated.

The Dashboard

The Employer Portal Dashboard or Overview page as it's also known, is your hub for exploring the Employer Portal. Here you'll find a series of modules to help you manage your account and complete your employer obligations.

The side navigation bar is your quick access list to those features you'll be using every day. The links are self-explanatory but here's a quick overview:

> **Overview** – returns to the dashboard summary page

> **Task Manager** – manage and complete member webforms

> **Data Centre Mailbox** – browse a shared establishment mailbox

> **Employer Mailbox** – browse your personal Employer Portal mailbox

> **MCR Data Centre Mailbox** – view a shared MCR establishment mailbox

> **Reports** – run reports for your establishment

> **Upload a file** – transfer files and templates to us

> **Download a file** – access the files you need from us

> **Employer Contact Details** – update your establishment's contact details

> **Templates** – blank forms to be completed as necessary

> **Member Search** – amend member information and obtain member prints

> **Data Centre Settings** – set your default establishment if you manage more than one.

Welcome module

This first module is intended to get you started with links to guidance and all of your account management tools, such as updating your login credentials and recovery options, as well as contact details for your establishment.

As a security check we'll also post the last date you logged in and information on what to do if you suspect this is incorrect.

Supporting modules

The portal dashboard is made up of a number of these supporting modules which provide quick links to useful sections and guidance on key topics. These modules will change to cover important topics throughout the year so make sure you check back in regularly to see what's new.

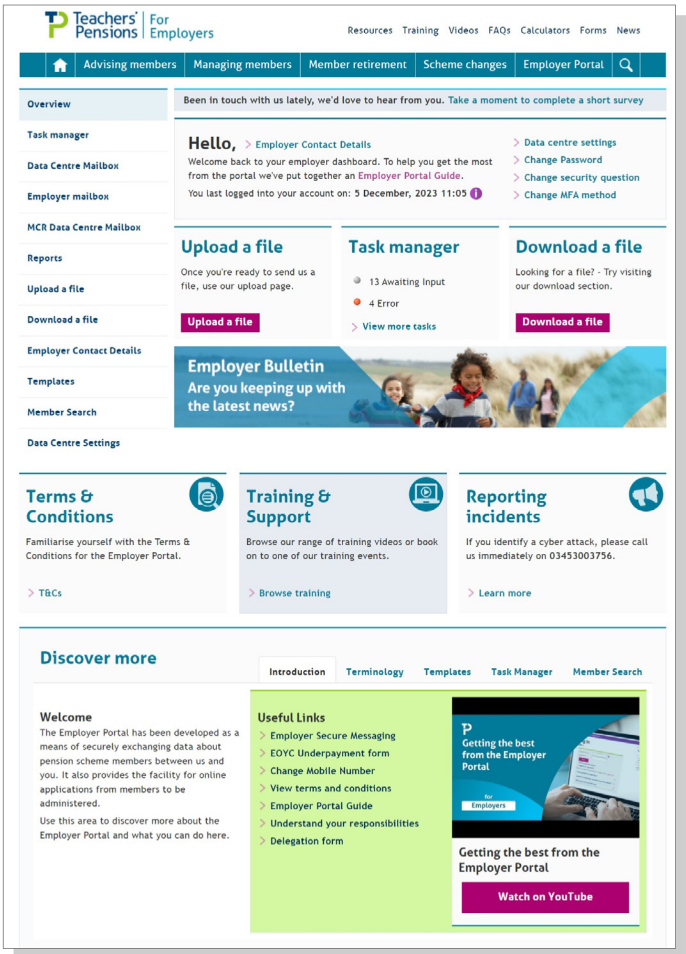
Task Manager module

Some modules are there as a quick reminder. Task manager provides a snapshot of the two-part application forms that members have submitted online for your attention.

There are three different status types you might see here:

- Awaiting input - the number of applications needing your input
- Complete - finished applications that've been sent to us
- Manually finished - lists the forms we've completed.

The Dashboard



Task module

Currently titled 'Discover more', the task module is used to promote several different tabs that may change throughout the year. There'll always be an introduction tab giving a basic overview of what the Employer Portal is, useful links and a quick introductory Employer Portal guide video. The remaining tabs can contain terminology information to help you with some acronyms we use from time to time, templates that you can download, member search functions and important news items or helpful new resources. These tabs are there to introduce new processes and existing sections to give you the information you need to get the most out of the Employer Portal.

Useful Links

Within this section we have some useful links which may change from time to time.
These can include, but aren't limited to:

- Send a secure message
- View terms and conditions
- Employer Portal guide link
- Understanding your responsibilities
- Delegation form.

Task Manager

The Task Manager makes managing the authorisation and tracking of webforms easier.

You'll be able to manage authorisations for:

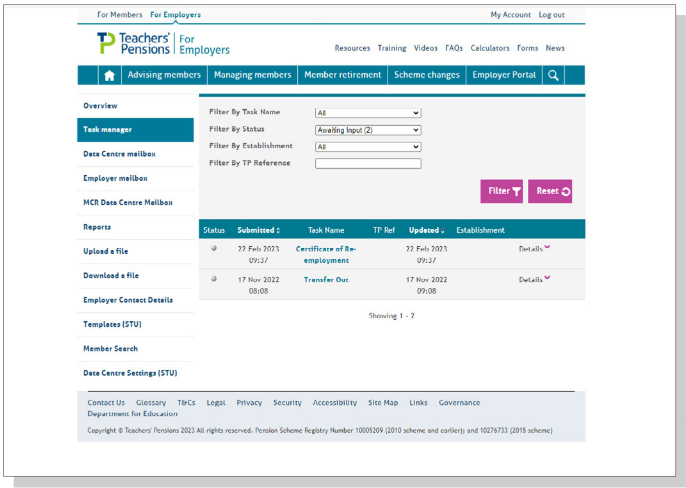
- Retirement applications
- Flexibilities applications
- Certificates of Re-employment
- Elections to join the Scheme
- Transfer in and opt out applications
- Repayments of contributions.

The tool allows easy management of webforms by using a selection of filters, which consist of:

- Task name: filter by the name of the form submitted
- Status: select from 'Complete', 'Awaiting Input' and 'Manually Finished'
- Establishment: that which the form relates to. If you manage more than one establishment this will show multiple establishment numbers, if you only manage one, they should all be the same
- TP reference: here you can filter for a specific member based on their Teachers' Pensions Reference number.

In addition to the filters, all forms can be sorted by 'updated date' and 'submission date'. To view extra details on a form, click the 'details' button to show a drop down of additional information. To jump straight into a form simply click anywhere within its line.

Task manager



Mailboxes

There are three different mailboxes that we may send information to from time to time.

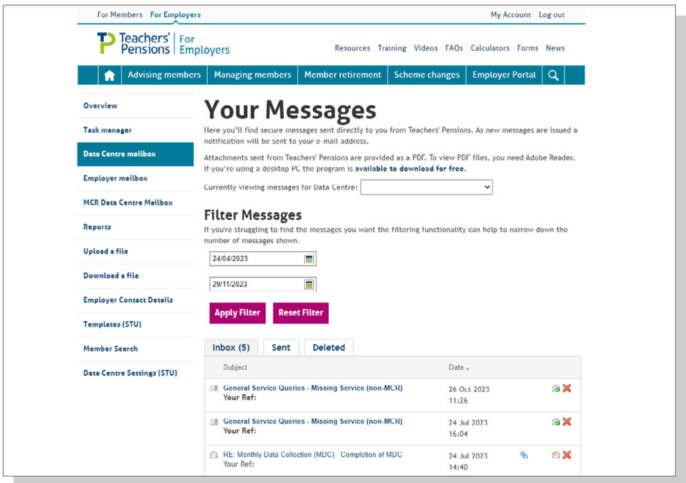
They're:

- Data Centre mailbox: Here we'll send secure messages directly to you. Notifications will be sent to your email address as prompts to alert you to check your Employer Portal account.

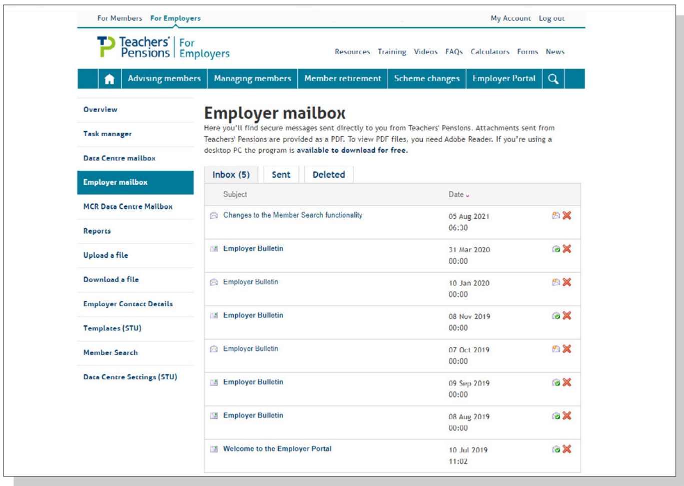
  The notifications you'll receive in this mailbox will relate to member applications, process reminders and anything else you'll need to action for a specific establishment.

  If you look after more than one establishment, you can use the drop-down box to select different establishments.

Data centre mailbox



Employer mailbox



- Employer mailbox: This mailbox is used to send you personal messages rather than specific establishments notifications.

  These can range from changes to process notifications to Employer Bulletin reminders.

- MCR Data Centre mailbox: This is specifically for your MCR submissions (if you've yet to on-board to MCR, you won't need to use this mailbox). You'll find all notifications in relation to your submissions including error files, reminder notifications, successful submission confirmations and from time to time, updates to the process.

Reports

The Reports tab allows you to download the Membership List report for any establishment you look after.

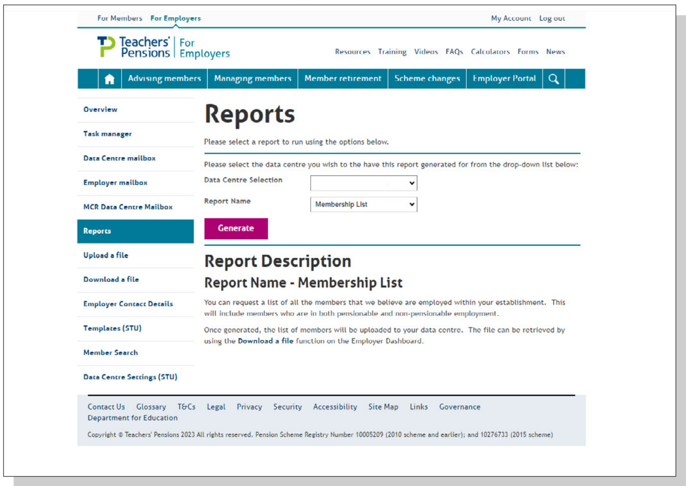
The Membership List report shows all members we have on record for a specific establishment.

It includes personal member details including their Teachers' Pensions Reference number, names and address details, email address, their status, if the member has opted out, and if they have any additional contribution/faster accrual/AAB buy out contributions.

This report is a really useful way for you to check that your records match ours for each member in your establishment.

Once requested, you'll receive the report within 24 hours, and it'll be available in the 'Download a file' section once ready.

Reports



How to upload files

Here we take a quick walkthrough of the steps you need to follow when uploading a file. There are two key rules to uploading template files (other files can also be sent):

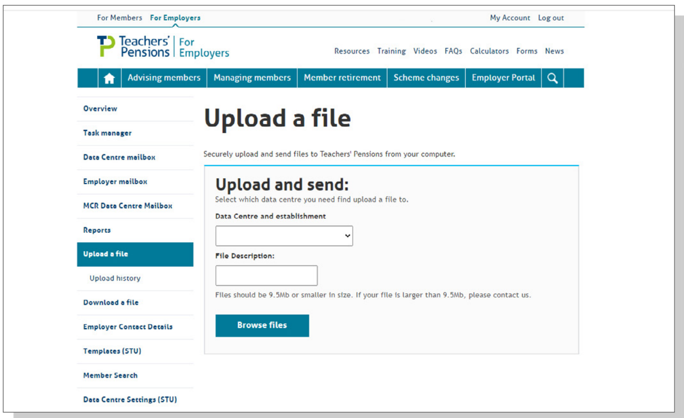
- Only use the templates currently held on the system to send information to us
- Save the files in a .csv format.

Documents such as covering letters or paper forms can be uploaded in a PDF format.

In order to successfully upload a file, it must meet the following criteria:

- It's been successfully converted to .csv format using the relevant template
- File name doesn't contain (1) or similar
- It hasn't been renamed by the user
- The user has entered a description on the upload page (can't contain symbols)
- The user has selected the correct LA/ Establishment number on the upload page
- The user has checked the box to agree to the Terms and Conditions on the upload page.

Upload a file



Uploading a file

To upload a completed file;

1. Click 'Upload a file'
2. Input a description for the file to be uploaded then click browse to search for the desired file
3. Select the appropriate file and click 'Open', which then populates the 'Upload File' field on the previous page. Click on 'Upload' which will then send the file to us
4. Once a file is uploaded, you'll receive a confirmation email. The email will note if the file upload has been successful or not. If it contains errors, an error file is produced for you to download
5. The errors can be accessed via 'Download a file' (see 'How to download files')
6. Once the error file has been downloaded, you should open the spreadsheet and noted in the end column will be an explanation of why the record has been rejected
7. When all corrections have been made to the error file, save the document as a .csv format and re-upload the file.

IMPORTANT

If files are uploaded in an incorrect format, they can't be processed.

File submission errors

Common errors you may come across in submitting files can be with your Monthly Data Collection (MDC) or Monthly Contributions Reconciliation (MCR) files.

If you receive any errors with your MDC file, please follow our error code guidance, while for MCR files, we've got an error table guide.

Upload history

If you ever want to revisit files you've submitted, you can check these in the 'Upload history' tab within 'Upload a file'.

If you've been given access to multiple data centres you can select which establishment you'd like to find a file for by using the drop down box.

You can also filter between specific dates, to help you pinpoint which week, month, or year you'd like to find a file from.

Once you've selected your chosen data centre and date range, you can check any uploads you've previously sent us. You won't be able to view these files, but can check the file name, description you entered when uploading the file, the date and time it was uploaded, our reference and the status of the file.

How to download files

In order for transactions to be successfully completed, a two stage process needs to be completed. The first stage is to 'Download' the appropriate template to your computer into which you'll enter the data. You can then 'Upload' the completed data into the Employer Portal using the 'Upload a file' tab, which we've covered earlier.

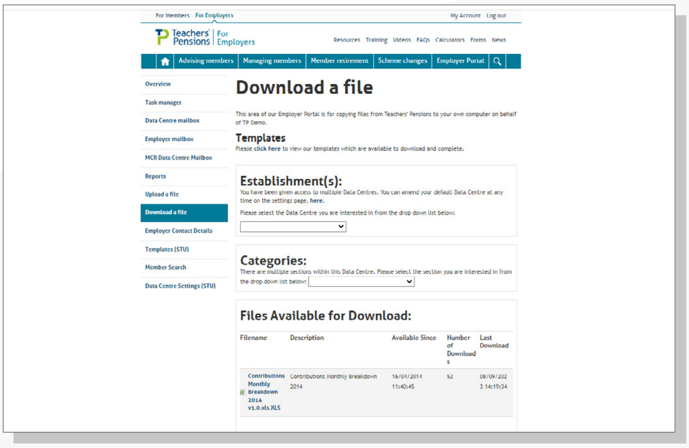
How to download templates

To download templates;

1. Click 'Templates' on the left hand navigation bar

2. Click the appropriate document that you wish to download and then click 'Save' when the message box appears. This will save the document to your computer - take note of where you save the document (e.g. My Documents). Please don't save the file to your desktop.

Download a file



How to download reports

A number of reports are available to download to help you administer the Scheme and assist members. Reports include;

- Member Prints – this will show a list of member prints that have been requested for download

- Error Files – these are files that have been returned by us for a variety of reasons including (but not limited to): incorrect or missing Role Identifiers, incorrect National Insurance numbers, missing service etc.

- End of Year Certificate (EOYC) – this downloadable report shows any additional contributions or pension flexibilities that individuals have elected to make that you can check against your records when submitting your annual EOYC

- Breaks – this report shows individual members who've had a break in service where we require further information

- Missing Service – MDC Monthly Checklist – this document will highlight any members from the establishment that haven't received their service for the relevant month

- Premature Retirement Death Notifications – this report shows deceased members for the establishment who've retired on premature grounds

- Non-MPO member by employer – this report lists all members within the establishment who don't have a My Pension Online (MPO) account. If members appear on this list, please encourage them to sign up.

- Joiners – this report will detail any member who's new to the establishment, and we've been unable to contact to provide Scheme information as we don't have an email address, or the member doesn't have an MPO account. You'll need to liaise with any members on this list and provide all relevant new starter information to them

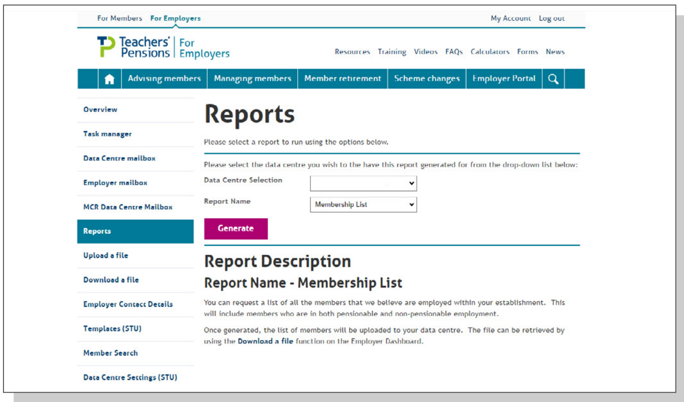
- Retiring members – this report lists members who are retiring in the month. There may be more than one copy of this report each month depending on when applications have been received. This report is to confirm if any changes have happened after the application has been submitted

- Reports – this is the Membership List report that lists all members that are on record with that employer. It shows their name, date of birth, Teachers' Pensions Reference number, address, opting information and details of any additional payments the member is making. This can be used to ensure that member information is correct and up to date

- APBREVAL – Additional Pension Benefits Revaluation - this report shows where there's an increase in the amount of additional contributions a member is making

- TR6 Member Prints – these are automatically generated member prints by the Employer Portal once we've been notified of a new starter.

How to download a report



To download a report;

1. Click 'Download a file' on the left hand side navigation bar

2. Select the appropriate data centre (where applicable)

3. Click on the report you wish to download under 'Filename' and the report will download for you.

IMPORTANT

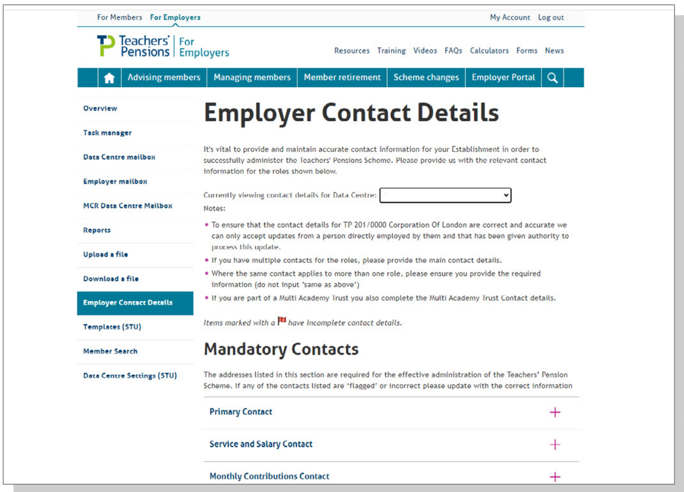
Don't rename any of our templates as this will result in errors when attempting to upload and process the information.

Employer Contact Details

In order for us to send communications to different people in your establishment, you'll need to make sure your [Employer Contact Details]() form is up to date.

If you look after more than one establishment, you can view the contact details for any establishment you look after, simply by selecting the relevant establishment from the drop-down box.

Employer contact details

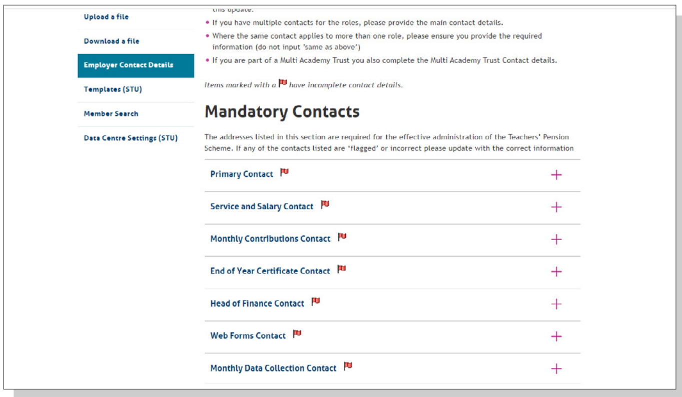


Once selected, or if you only look after one establishment, the Mandatory and Optional contacts for that establishment will be shown.

Mandatory Contacts

The addresses within this section are required for the effective administration of the Scheme. If any contacts listed are 'flagged' it means they're incomplete and require updating immediately.

Mandatory contacts



Mandatory contacts include:

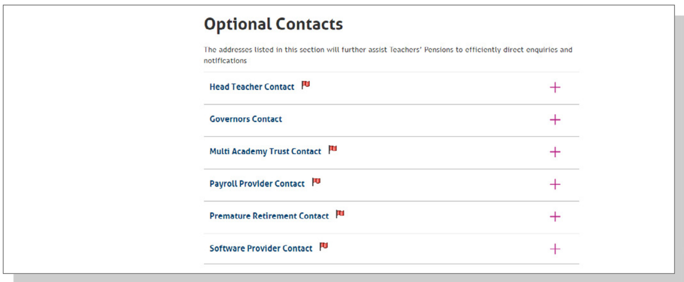
- Primary contact – this person is the nominated contact who is the main representative of the establishment and will have overall responsibility for administering the Scheme and keeping staff updated
- Service and Salary contact – who'll be responsible for the handling of service and salary enquiries
- Monthly Contributions contact – who'll be in charge of the submission of contribution payments and will be expected to correct any errors that arise from submissions
- End of Year Certificate contact – who'll submit the annual End of Year Certificate each year
- Head of Finance Contact – who'll have overall financial responsibilities of the establishment.

There may be one person who falls into a few of these roles, but we won't know that, so please don't assume that if you've completed the Head of Finance contact details knowing they also look after Monthly Contributions and the annual EOYC completion that we'll know this, please complete all contacts.

Optional Contacts

These are extra contacts that will further help us to direct any enquiries we may have. They're not mandatory, so if you don't have a contact for these categories, you don't need to supply one.

Optional contacts



Optional contacts include:

- Head Teacher contact
- Governors contact – the person with overall responsibility for administration and compliance within your establishment
- Multi Academy Trust contact – who'll receive and resolve queries and escalations from us specifically relating to the MAT
- Payroll Provider contact
- Premature Retirement contact – responsible for invoices of premature retirements
- Software Provider contact – who'll receive notifications and updates on various IT solutions.

Some contacts are advised to have central email addresses while others should be personal. The Contact Details form in the Employer Portal will explain which you should provide.

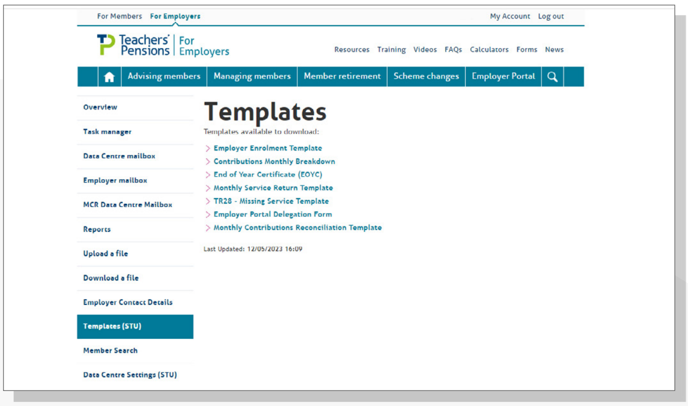
Templates

You can download the various templates that you need to successfully administer the Scheme from this section. They'll always be the latest templates, so make sure to download from the Employer Portal each time you use them instead of downloading and saving them to your desktop to help prevent errors occurring.

Depending on your role, you may not use all the templates within the section, but it helps to know what they're needed for:

- Employer Enrolment template – a template for employers who are using the MDC reporting method. This must be completed when enrolling new members into the Scheme. This isn't a requirement if you're using MCR
- Contributions Monthly Breakdown – a monthly submission for establishments using the MDC reporting method to submit contributions. This is sometimes referred to as the 'Paying In Slip' or 'Contributions Slip'. Again, this isn't needed if you're using MCR
- End of Year Certificate (EOYC) – this template is used each year to document and confirm the contributions that should've been submitted to us and isn't just a record of contributions that have been sent over. It's a requirement for both MDC and MCR reporting methods
- Monthly Service Return template – this is the template for employers using MDC. It's used to record member service. You don't have to use this template when submitting if you prefer to use your own Excel document version
- TR28 – Missing Service template – this template is used by establishments using MDC and who need to update missing service for members. Employers who've moved to MCR, but who need to update missing service for members for when they were on MDC, can also use this template for updates.
- Employer Portal Delegation form – this document is used to provide/update employers and payroll providers access to the Employer Portal. Employers can use this to add/remove users
- Monthly Contributions Reconciliation template – this template is the standard MCR submission template that must be used by all employers when submitting service and salary information once they've on-boarded to MCR. Opting in/out and enrolment information for members is included in this template.

Templates

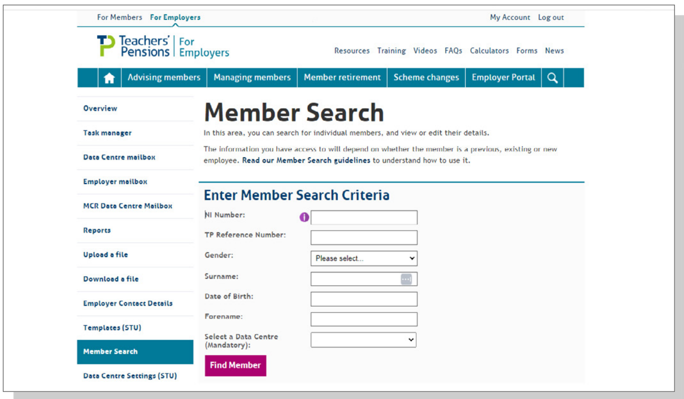


Member search

In this area you can search for individual members, and view or edit some or all of their details.

The information you've access to will depend on whether the member is a previous, existing or new employee at your establishment.

Member search



Depending on your access, you may be able to see the member's:

- gender
- date of birth
- marital status
- Normal Pension Age
- address
- email/mobile/telephone number
- Teachers' Pensions Reference number
- National Insurance number
- title
- first name(s) / surname
- previous surname.

If you've access to this information, you can edit it to keep records up to date.

Before you start searching for a member, make sure you have a Data Centre set. If you don't you may experience issues downloading a member print.

You'll need one of the following combinations to search for a member:

- Teachers' Pensions Reference number and gender
- National Insurance number and date of birth
- National Insurance number and surname
- Surname and date of birth – this search will only return members with no previous service and have a temporary National Insurance number.

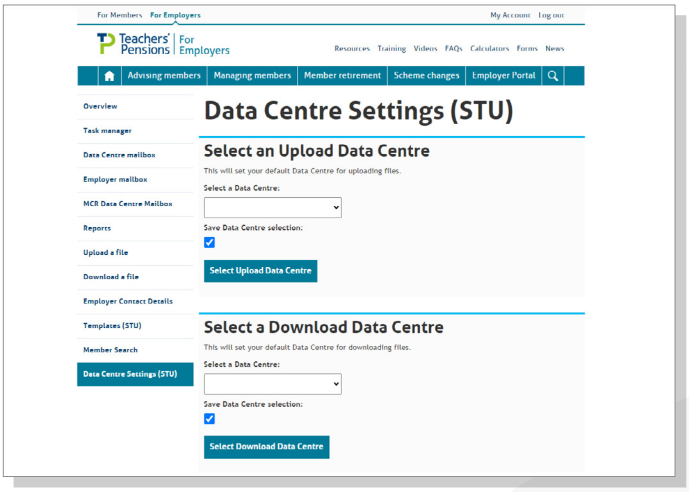
You can narrow the search further by using the initial and forename fields, however entering data into all fields will return no results.

For further information about Member Search and what information you'll have access to, please read our guidelines for Member Search and Member Print. These can also be found on the Member Search page in the Employer Portal.

Data Centre Settings

If you have access to multiple data centres, you can select which data centre you'd like the upload/download a file sections to default to in the Data Centre Settings area.

Data centre settings



Further support

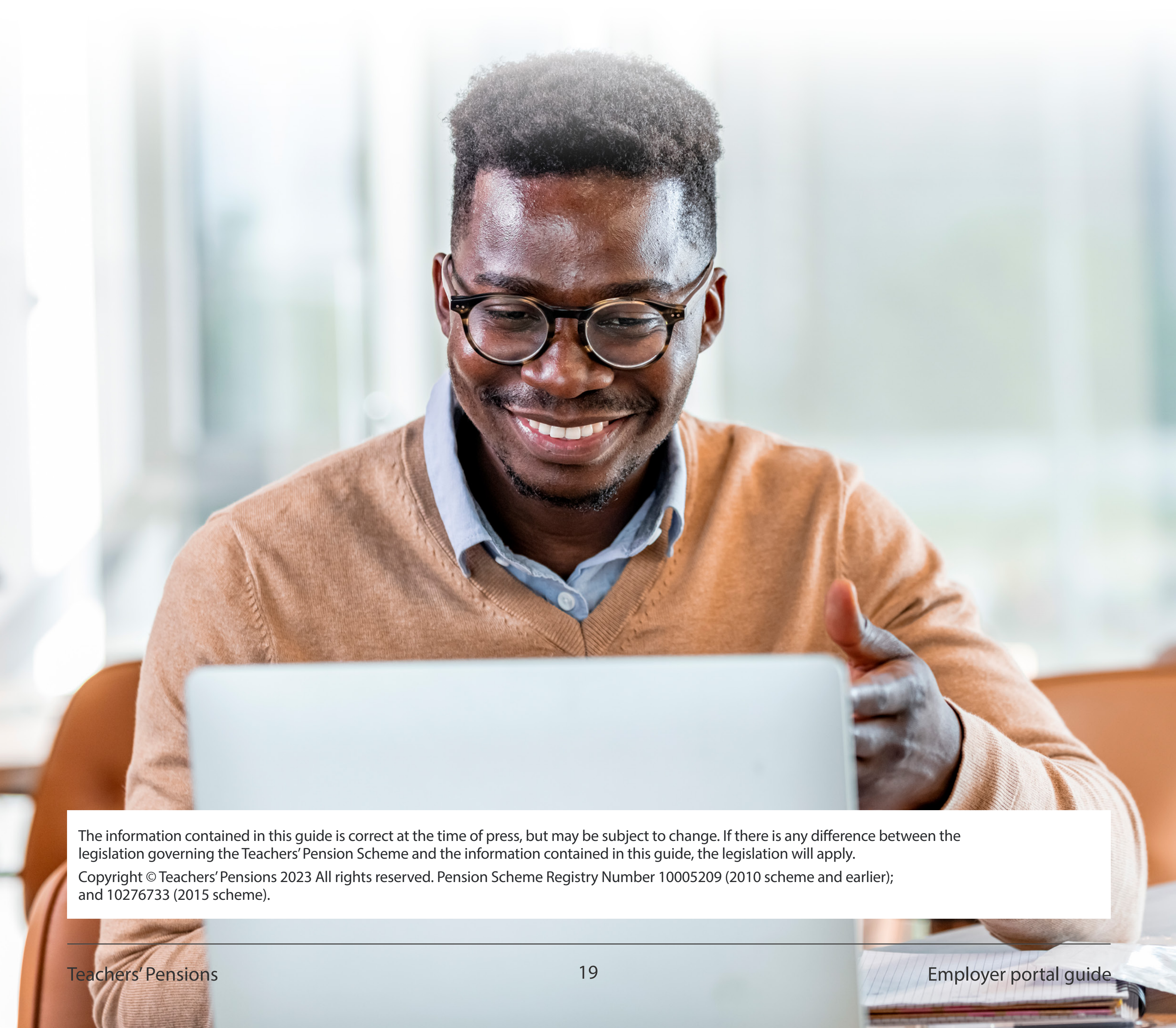
For further support with any questions you have around the Employer Portal we've got FAQs you can view, or you can:

Visit us at:

https://www.teacherspensions.co.uk/employers/employer-hub.aspx

or contact us at:

https://www.teacherspensions.co.uk/employercontact



The information contained in this guide is correct at the time of press, but may be subject to change. If there is any difference between the legislation governing the Teachers' Pension Scheme and the information contained in this guide, the legislation will apply.