

On-boarding guide

Monthly Contributions Reconciliation (MCR)

Service and contributions in one place

November 2022



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Where there is any difference between the legislation governing the Teachers' Pension Scheme and the information in this guide the legislation will apply.

On-boarding Overview

On-boarding to Monthly Contributions Reconciliation (MCR) began in July 2020, with a Pilot Group of approximately 350 individual employers.

Full on-boarding began in October 2020 and MCR will soon be the only method to provide contributions, service, salary, and enrolment information to Teachers' Pensions.

MCR combines three existing processes – Monthly Data Collection (MDC), Monthly Contributions Breakdown submission and Automatic and Contractual Enrolment. Once you commence your MCR on-boarding you'll only be able to provide the data using MCR. Your ability to submit MDC and Monthly Contribution Breakdown Submissions will be revoked and we'll also extend your contributions payment deadline to the 15th of each calendar month.

For the initial three months of on-boarding, you'll be in a Data Assurance stage; your data WILL be uploaded on to the livesystem and therefore member records will be updated with the information you provide.

During this stage we'll provide additional support to assist with your submissions and concessions may be made for payment deadlines.

The MCR Support Team can be contacted via email at mcr@teacherspensions.co.uk

Once you have successfully completed the Data Assurance stage, you'll be classed as LIVE. There'll be no requirement to provide backdated service and salary information as this will have been provided from your MCR submission during the Data Assurance stage and will lead directly on from the MDC and Monthly Contributions information you sent prior to starting MCR.

Prior to on-boarding

We request that any outstanding MDC error files or checklist corrections are completed, as well as ensuring your Monthly Contribution Breakdown slips are up to date.

Please ensure that your End of Year Certificate (EOYC) returns have been completed up to the last submission date.

Prior to your on-boarding date you'll need to download an Employee Listings report from the Employer Portal. Please log into your Employer Portal and select 'Reports' in the tool bar. You can then select to generate a 'Membership list'.

The 'Employee Listings Report' details all your active employees associated to your establishment and provides their personal details, as well as their status (e.g. Opted-out) and any elections and/or flexibilities linked to their record.

Please ensure that any variances between data held by us and your payroll records are amended by either:

- Amending the data held within your records
- Amending the data held by us by performing a Member Search via the Employer Portal and using the edit functionality
- Providing an enrolment template submission for members who should be in pensionable employment for enrolments from 01/10/2012. For enrolments prior to this date please contact the [elections team](#).

You'll also need to ensure that you have delegated access to the Employer Portal to anyone who'll need to complete a MCR submission.

This must be completed at an establishment level by filling in a [Delegation form](#).

If your establishment becomes an academy but the Local Authority is still your payroll provider, you'll need to fill out a Delegation form to allow them to have access to your establishment's individual data centre.

If you're a payroll provider wanting to add a new establishment to your data centre, we must first receive a Delegation form from the establishment before receiving your request.

If you have already given delegation access there's no need to repeat this process.

Data Assurance

Instead of a test period there'll be a three month Data Assurance stage. During this time we'll work closely with you to ensure the data you supply is correct.

We want to make the transition from MDC and Monthly Contribution Breakdowns as simple as possible, so the decision has been taken that the data you upload for MCR will update the live member records.

During this period we'd recommend that if you're extracting the MCR submission directly from your payroll system, or receiving the submission from your payroll provider, that you utilise the import functionality within the MCR template to check the file before submitting (please refer to the template guidance).

Please Note

To ensure our employer submission templates for MCR, MDC, etc. worked for the majority of employers, we developed them using Windows supported Microsoft Excel. This is the most popular platform we've encountered within our employer base.

However, due to the compatibility issues between Windows versions of Microsoft Excel and Apple iOS versions of Microsoft Excel, the MCR Template will not work as intended if used on an iOS supported device.

We therefore recommend that before you transition to the MCR submission process, you ensure you've access to a Windows supported device, to allow you to use the template as required.

If you're unable to gain access to a Windows supported device, then you'll need to contact the MCR Team for advice on how to produce and validate your MCR submissions.

The import function will perform validation and highlight any **Stop** and/or **Warning** errors. Any Stop errors, highlighted in red, must be corrected prior to submission or your whole file will be rejected.

Warning errors, highlighted in orange, must be reviewed to make sure the data provided is correct. During the Data Assurance stage if you're unable to identify the root cause of the Warning error, we require you to contact us before you submit the file, and we'll work through the error with you to determine the action that's required. If it's an example where an indicator has not been selected, such as family leave, then you'd be able to correct this before submission. If the Warning has been caused by incorrect contribution amounts then you'd be able to go ahead and submit the file with the error and make the correction in the following month's MCR file, the team will advise you how this correction needs to be submitted in the file and the error number will appear on the report sent to the Employer Portal.

Please contact the MCR team via email at mcr@teacherspensions.co.uk

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The MCR template can be found in the Download section of the [Employer Portal](#). During the three month Data Assurance stage, you're required to submit your MCR file in time to make payment for the 15 of the month. However, if your submission is late due to delays caused by WARNING errors within the data, we'll accept a late submission and late payment.

Late submissions must still be made within the expected month (i.e. if you were due to submit in time to make payment by 15 November 2022 we'd still require your submission within November 2022). The latest we'd accept payment would be the **third** working day of the following month (i.e. if payment was due by 15 November 2022 and due to issues you submitted your MCR file late [but still within the month], the latest we'd accept payment without incurring interest would be 5 December 2022).

You must make us aware of the issues that are causing the delay and be in consultation with us regarding these errors for these exceptions to apply.

During the test period, if you don't make us aware of issues before the expected payment date, or you don't make a full MCR submission*, you'll be automatically charged interest on any late payment.

*The data must be supplied for all employees that are determined by the employer as being eligible to be a member of the Teachers' Pension Scheme to class as a full submission.

Where you're unable to complete on-boarding for the month you have instructed, it's vital that you contact us as soon as possible. Please advise the MCR team of the date which you'd like to defer your on-boarding to and why.

We'll revert the establishment(s) to MDC and Monthly Contributions Breakdowns; your submission deadline will also revert back to the 7th of the month. The option to revert back to MDC and Monthly Contributions Breakdowns would only be available prior to MDC being phased out. Once MDC is phased out, all submissions must be made using MCR.

Employer Success Criteria

The following table presents the proposed success criteria, which an employer must adhere to in order to complete the Data Assurance stage:

Task 1	<p>Criteria</p> <p>The employer will be required to complete and return a full MCR extract in time to make payment for the 15th of each month.</p>	<p>Measurement Method</p> <p>Three MCR extracts returned to Teachers' Pensions, via the Employer Portal.</p> <p>This must be received in time to make payment by 15th of each month unless a legitimate explanation for delay is provided – this will be acceptable only for the first two months.</p> <p>Final month submission and payment MUST meet the deadline.</p>								
Task 2	<p>Criteria</p> <p>Any 'Warning' errors created from the submission must be corrected in, or before the third month's MCR submission.</p>	<p>Measurement Method</p> <p>All errors will be corrected in the following month's MCR file.</p> <p>All re-submitted errors must pass the validation checks in Hartlink to a 100% standard.</p> <p>The above standard must be demonstrated by the third month at the latest.</p>								
Task 3	<p>Criteria</p> <p>The total error rate by the end of the Data Assurance stage on-boarding must be lower than the applicable percentage in the table.</p> <p>This will be the total number of errors against the total number of data rows received.</p>	<p>Measurement Method</p> <p>The table below presents the variances per employer size.</p> <table border="1" data-bbox="767 1077 1453 1245"> <thead> <tr> <th>Employer Service Submission</th> <th>Target %</th> </tr> </thead> <tbody> <tr> <td>0 - 500 service lines</td> <td>12.5%</td> </tr> <tr> <td>501 - 1000 service lines</td> <td>10%</td> </tr> <tr> <td>1000 + service lines</td> <td>7.5%</td> </tr> </tbody> </table> <p>Over the three month on-boarding stage, an employer (based on their service line submission size) has an average error rate of the stated target % or less.</p>	Employer Service Submission	Target %	0 - 500 service lines	12.5%	501 - 1000 service lines	10%	1000 + service lines	7.5%
Employer Service Submission	Target %									
0 - 500 service lines	12.5%									
501 - 1000 service lines	10%									
1000 + service lines	7.5%									
Task 4	<p>Criteria</p> <p>The employer has returned the MCR in accordance with the Extract File Specification.</p>	<p>Measurement Method</p> <p>The returned file for all three months matches the structure of the Extract File Specification, including fields and rules.</p>								
Task 5	<p>Criteria</p> <p>The data must be supplied for all employees that are determined by the employer as being eligible to be a member of the Teachers' Pension Scheme.</p> <p>Please see the MCR User Guide for clarification.</p>	<p>Measurement Method</p> <p>Any variance in the number of members submitted between months one and three must be explained as being the result of a logical change, for example a leaver or starter.</p>								

Data assurance is initially for three months however, if you've not met the criteria to pass within this time period, we'll extend your data assurance period to give you chance to get your submissions correct. We'll continue to view your data submissions and send confirmation to you once you've passed. Until you receive this confirmation, you'll stay in data assurance. We'd only ask you to revert back to Monthly Data Collection in extreme circumstances.

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Payroll Providers

If you're a payroll provider and would like to submit MCR for all of your clients/employers through a single submission and data centre, or separate files through a single data centre, you can apply for a 750/xxxx data centre number.

Once we've received and accepted your MCR submission, you'll be issued with individual receipts relating to the employers and/or MATs provided within your MCR submission.

We require one payment per establishment or MAT (set up using method one, please see Multi Academy Trusts on the following page). You can't combine multiple establishments under one LA/Establishment number.

You can stagger the Data Assurance stage if you're a payroll provider, however if you choose to do this you would need to send separate submissions for MDC and MCR. The payment date would only be extended to the 15th of the month for establishments on MCR. The establishments being submitted on MDC and Monthly Contributions Breakdowns would continue to have a deadline of the 7th.

To apply for payroll provider access (750/xxxx), please contact tpestabs@teacherspensions.co.uk

If you're submitting data on behalf of an establishment, please ensure they have provided the relevant delegation form and authority for you to do so.

Please note if you provide payroll services for a maintained school, the data must be either sent to the establishment to forward to the LA or sent directly to the LA in time for them to submit their MCR file and make payment by the 15th of the month.

If an existing establishment joins your payroll services and has already completed/started Data Assurance and you're not currently ready to submit MCR for your establishments, they'll need to contact us and we can agree to revert them back to MDC and Monthly Contributions Breakdown submissions. They'll have to complete the Data Assurance phase again once you're ready to commence. Their submission deadline will revert back to the 7th of the month.

Multi Academy Trusts

If you're a Multi Academy Trust (MAT) utilising a 751/xxxx, you must fill in section E of the On-boarding form to inform us of the method you'll use to submit your MCR and contributions payments, these are defined below:

Method One:

MAT submission: all of the data for your academies and centralised staff is supplied on one single file under the 751 number. You would then be expected to make ONE payment once the confirmation receipt is received. Using this method all associated establishments would have to start the Data Assurance stage at the same time. Any new establishments joining a MAT after their Data Assurance stage has completed would just be classed as live and would not go through this stage.

Please be aware that although you can submit one file under the 751 number, each row of data must contain the LA and Establishment number of the academy where the member is employed. Only centrally employed staff, such as an Executive Head or supply, will hold an LA and Establishment number of the MAT (i.e. 751/xxxx).

Method Two:

Academy submission: each academy is submitted on its own MCR file. In addition, any centralised staff will also be provided on a separate MCR file. For example, if a MAT has five academies and also employs central staff, we'll expect six MCR submissions (five for the academies and one for the centralised staff). We would then expect six payments, one for each submission. You can't combine multiple establishments under one LA/Establishment number.

If you're using Method Two you can stagger the Data Assurance stage. Please be aware that the payment deadline of the 15th would only be extended to the establishments in the Data Assurance stage. Any academies that have not started MCR would still need to complete MDC and Monthly Contributions Breakdown by the 7th of each month.

Once you have completed this stage for your existing establishments, any brand new establishments joining your trust would still go through the Data Assurance stage.

General information for Multi Academy Trusts

If you're a MAT, which does not currently hold a 751/xxxx number and wishes to do so, please contact tpestabs@teacherspensions.co.uk

If you don't set your trust up with a MAT 751/xxxx number you'll only be able to send individual MCR files and individual payments (Method Two).

If an existing establishment joins your trust and has already completed/started this stage and you're not currently ready to submit MCR for your establishments, you'll need to contact us and we can agree to revert them back to MDC and Monthly Contributions Breakdown submissions. They will have to complete the Data Assurance stage again once you are ready to commence. Their submission deadline will revert back to the 7th of the month.

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On-boarding form

In order to adopt MCR we require an On-boarding form. All fields must be completed where applicable. The form can be found at www.teacherspensions.co.uk/mcrguides

When completing the form for your own establishment please consult with your software and payroll provider regarding the readiness dates of their MCR solution, prior to selecting your on-boarding month.

If you're a payroll provider you can fill this form out on behalf of your clients, providing you have permissions granted.

If you're a payroll provider and supply services to more than one MAT you'll need to fill out separate On-boarding forms so that you can indicate the submission and payment method for each.

If you're joining a payroll provider, please ensure that you have also completed the Delegation form, to allow your payroll provider permission and access to your Employer Portal Data Centre.

If you're a payroll provider and are listed as the main contact, we'll still require contact details for each establishment you provide services for. Although the payroll provider submits data to us, the establishment is responsible for providing member data to us as they are the data owner. Failure to provide MCR data may result in escalation to the establishment itself.

Please be assured that we'll take all necessary steps to support and correct any MCR issues before an escalation is made. We'll liaise with the main contact to rectify any problems where possible. If the main contact changes, or is out of the business for an extended period of time during on-boarding, please update your establishment's contact details via the Employer Portal.

Your on-boarding schedule must commence from the month you indicated on your On-boarding form. Three submissions must be received for consecutive months.

For example, if you select to on-board in October 2022, we'll expect the first MCR file to contain October 2022 data and be received in time to make a payment on or before 15 November 2022, the second file to contain November 2022 data and be received in time to make a payment on or before 15 December 2022 and the third file to contain December 2022 data and be received in time to make a payment on or before 15 January 2023.

We request this form to be sent to us as soon as possible, following consultations with your payroll and software provider.

Please send the completed form to mcr@teacherspensions.co.uk with the title of the email 'On-boarding for MCR'. Please send the completed excel form, **do not** send a PDF.

There will be a limit on number of establishments that we can on-board each month between October 2020 and the deadline date. This is to ensure that we can provide the correct level of support to you during this process. Once we reach this limit during any of those months, on-boarding will be closed. We will update the information on the website to keep you informed about which months are available.

If you want to ensure the month you require is reserved, we advise that you send your On-boarding form as soon as possible. If this month is available then you will receive an email confirming your next steps.

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If you request to on-board in a month that has been closed, you will be allocated a different on-boarding month as close to your original request as possible. Again, you will receive an email confirming the allocated date and the next steps. You can request this to be changed if the allocated date is not suitable.

If you are unable to on-board in the month you have reserved following the successful submission of an On-boarding form, you would just need to inform us, and we will discuss your options with you.

The On-boarding form can be found at www.teacherspensions.co.uk/mcrguides

The form must be received at least one month prior to your preferred on-boarding month. For example, if selecting October 2022 as your on-boarding date, we require the form by the 30 September 2022 at the latest.

Sections A, D and F are mandatory for all. Section E is mandatory if you're a Multi Academy Trust using a 751/xxxx. Sections C and B are required only if you have these services. We'll work with the payroll and software providers so that they can develop their MCR solutions successfully. The more information you can supply us regarding their contact details will assist with this.

The form has been designed to be completed electronically. It can be submitted by an establishment or a payroll provider that has already been given delegation access.

Section A - Monthly Contributions Reconciliation Contact Details

Please provide the contact details for the person who is the main contact for all MCR queries. This information will be used by us during the on-boarding stage to provide support and escalate where required. This can also be a payroll provider, if you/they have been granted the relevant permissions. We have requested two contacts in the event the main contact is out of the business for any reason and we need to speak to you.

If you're a large payroll provider and different contacts deal with different clients, we suggest that you submit separate On-boarding forms for each contact with their respective establishments listed.

Section A - Monthly Contribution Reconciliation Contact Details	
Enter the details for the main contact for MCR. This contact will be used by Teachers' Pensions in the event of a query regarding the onboarding process of the establishment(s) listed on this form.	
1. Please provide your Contact Details	
1st Contact Name	
Email	
Telephone	
2nd Contact Name	
Email	
Telephone	
Access to the establishments Employer Portal is required to submit your MCR file. If you require access please fill in the required documentation for delegation and access which is available at: https://www.teacherspensions.co.uk/employers/resources/employer-help/employer-forms	

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Section B - Employer Payroll Provider Details

This is the company that provide all the details for your payroll, and/or submit the data on your behalf, if you use one. The contact details of your payroll provider are required whether they submit your MCR file on your behalf or they send the submission for you to send to us. If you don't know the 750/xxxx of your provider, leave it blank and supply the contact name and name of the provider or contact them for the information.

We must be informed if you change your payroll provider.

If you provide an on-boarding date, which conflicts with a payroll provider's solution release date, we'll contact you to discuss your options.

Section B - Employer Payroll Provider Details	
2. Please provide the Contact Details of your Payroll Provider (if applicable)	
Contact Name	
Payroll Provider	
Email	
Telephone	
Payroll Provider Number (750/XXX)	

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Section C - Software Supplier Details

Please advise which software supplier you use and provide a contact name and email address for them. If you don't have these details please provide the name of the software package you use. This will ensure we can liaise with them if there are any changes to the MCR solution or escalate any issues that need to be resolved. We'll not contact them about your submissions.

Section C - Employer Software Provider Details	
This information is required so that we can communicate any changes to the MCR solution directly to them. We will not be contacting software providers about your submissions.	
3. Please provide the Contact Details of your Software Provider (if applicable)	
Contact Name	
Software Provider	
Email	

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Section D - Employer Establishments Information

We require a list of all establishments you'll be submitting data for. If you're a single establishment you'll still be required to fill in this section as this is where you'll advise us of your on-boarding date.

In the first five columns of this section we need the LA/Establishment number, establishment name, establishment contact, establishment email address and establishment contact number.

These details will only be used if we fail to receive submissions and don't receive adequate/timely responses from the main contact for MCR.

As mentioned previously, the establishments still remain responsible for the submission of data and data quality, even if outsourcing has occurred.

Failure to provide the contact details for each establishment will result in the On-boarding form being rejected and returned to you.

Please do not provide the same contact details for all the establishments, unless they are part of a Multi Academy Trust.

In column six, the on-boarding month must be completed for all establishments. The month you enter is the month you'll be supplying data for.

For example, if you select October 2022, we'll expect an MCR file containing October 2022 data to be received in time to make a payment, not later than 15 November 2022.

If you wish to on-board your establishments on different dates, please indicate this within the establishment data table. (Please review Multi Academy Trust section if you belong to a MAT).

If you're submitting data for more establishments than there are rows available, you can insert more lines by right clicking on your mouse and selecting insert, then add the details of these establishments in the additional row(s).

NB: If you're a LA, you don't need to provide the name and number for each maintained school within the LA, you just provide the main LA number.

The final column is for the 751/xxxx number, if the establishment is part of a Multi Academy Trust.

Section D - Employer Establishments Information

Please list all of the establishments who you'll be submitting data for: These details will only be used if we fail to receive submissions and do not receive adequate/timely responses from the main contact. If you'll be submitting data for more establishments than there are rows available, please add the details of these establishments to the bottom of the below table by using the Insert a New Row function.

NB: If you are a LA, you do not need to provide the name and number for each Maintained School within the LA.

LEA/Estab (XXX/XXXX)	Establishment Name	Establishment Contact	Establishment Email Address	Establishment Contact Number	Onboarding Month and Year (MM/YYYY)	If part of a MAT, provide the 751 Number (751/XXXX)

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Section E - Multi Academy Trust (MAT) submission method confirmation

If your establishment(s) is part of a MAT that have a 751/XXXX number then this section is mandatory.

There are two methods for submission of MCR data and payment, please refer to the Multi Academy Trust section above.

If you're making one MCR submission and one payment for the trust and all of the academies within the trust (method one) then enter 'MAT submission' in the box. If you'll be making separate submissions and payments for each establishment and the MAT (method two) then enter 'Academy submission'.

If you submit your form without making the selection the form will be returned to you to complete.

Section E - Multi Academy Trust Submission Method Confirmation	
This section is mandatory for Multi Academy Trusts only. Please state the method you'll be providing your MCR file and payment. If you're making one MCR submission and one payment for the trust and all of the academies within the trust (method 1) then enter 'MAT Submission' in the box. If you'll be making separate submissions and payments for each establishment and the MAT (method 2) then enter 'Academy Submission'.	
Please provide the method you will provide your MCR file and Contribution Payment	
Submission Method	

Please note if you are a payroll provider looking after multiple MAT's if their payment methods are different you'll need to send separate On-boarding forms for each MAT.

Section F - Activation Form Declaration

You need to simply type your name in the box that states signed. Date submitted is the date you're sending this form to us.

Section F - Activation Form Declaration	
Please confirm that the details entered have been completed to the best of your knowledge by typing your name in the box below. Our Records will be updated based on the information provided on this form.	
4. Please provide the Activation Form Declaration details below	
Signed (Type Name)*	
Date Form Submitted*	

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Need a hand?

The easiest way to contact us is via our Employer Support Team, our MCR team, or explore our website for any queries you may have.



Visit us at:

www.teacherspensions.co.uk



Call our Employer Support team on:

0345 300 3756

Monday–Friday, 8.30am–6.00pm



Write to us at:

Teachers' Pensions, 11b Lingfield Point,
Darlington, DL1 1AX



Call the MCR team:

0345 300 3756 (option 4)

Monday–Friday, 8.30am–6.00pm



Email the MCR team:

MCR@teacherspensions.co.uk

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.

Department for Work and Pensions – For questions about State Pension please contact the Department for Work and Pensions on: 0800 731 0175.

HM Revenue & Customs (HMRC) – If you have any other questions about your income tax or P45 please contact: HMRC, HM Revenue & Customs Customer Operations, PSA PO BOX 4000, Cardiff, CF14 8HR. Contact telephone number: 0300 200 3300. The PAYE number in respect of your teacher's pension is 948 400.

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