



eBusiness Submission Guide



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1.0 Overview

eBusiness is The Pensions Trust's Online Pensions Management System. It is a secure method for employers to:

- submit monthly contributions data;
- inform The Pensions Trust of internal transfers; and
- complete leavers online.

The purpose of this Guide is to assist you, the employer, in using the system for the first time.

There is also additional support available through the relevant Helpdesk (details are provided at the end of this Guide). Additional support documentation and online tutorials can also be accessed through our website at **www.thepensiontrust.org.uk > Document Library > General Literature > eBusiness Literature**, or for the Social Housing Pension Scheme (SHPS) at <http://www.thepensiontrust.org.uk/TPT/SHPS/Homepage.htm> and the SFHA Pension Scheme at <http://www.thepensiontrust.org.uk/TPT/SFHA/SFHAHomepage.htm>

2.0 Logging On

Step 1: To Connect

You will have been provided with a unique Username and Password which will have been sent from the email address **helpme@thepensionstrust.org.uk**

- Please log onto the internet and go to the eBusiness login page at **<https://www.online.thepensionstrust.org.uk/>**
- Enter your Username and Password in the relevant boxes and follow the instructions to set up your secrets and choose your own Password.

3.0 Submitting Contributions

Step 2: Manage Contributions

This area of the system enables you to enter/upload your data. To ensure the most accurate information is collected and updated, eBusiness will check the data and once any validation results have been satisfied you will be able to submit the data to us for processing.

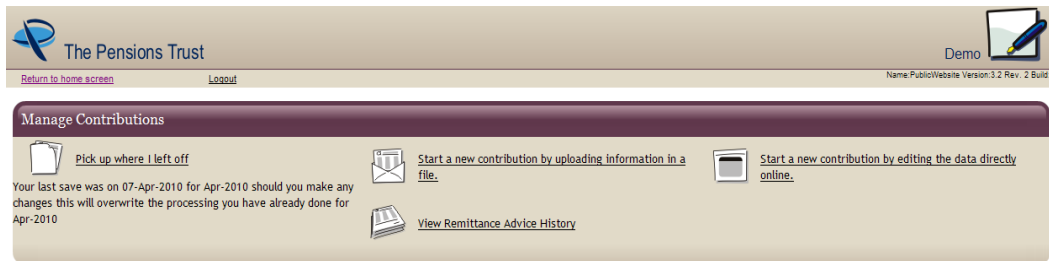
After logging in you will now be at the 'I want to...' or Index screen shown in **Fig 1**.

Fig 1



- Click on the 'Manage Contributions' option to open the screen shown in **Fig 2**.

Fig 2



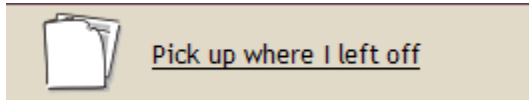
There are four options on this screen:

- Pick up where I left off;
- Start a new contribution by uploading information in a file;
- Start a new contribution by editing the data directly online; and
- View Remittance Advice History.

These sections are described in greater detail below.

'Pick up where I left off.'

Fig 3



It is possible to leave the eBusiness system at any time during the contribution submission process. This option allows you to return to your saved submission and continue processing it.

In addition, if you have already submitted your contributions file and this has not yet been processed by The Pensions Trust, you can access your data via this option, amend it and send it through to us again if necessary.

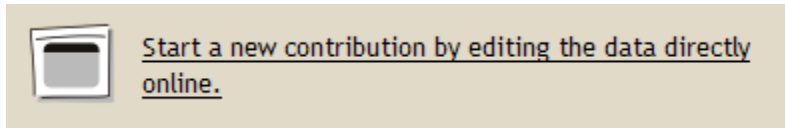
Please note: If you do this, the most recent file you have sent will be used to process your contributions.

If you are using eBusiness for the first time, or if you have submitted contributions and they have been processed, this option will be 'greyed out' as there will be no data there for you to access.

If you are using *'Pick up where I left off'*, go to **Step 6** on page 15.

'Start a new contribution by editing the data directly online' as shown in **Fig 4**.

Fig 4



Clicking on this option allows you to input data manually for each individual member. This option can be useful if you are providing contributions data for a small number of members, but if you have a large number of members then this option can be onerous and time consuming.

Furthermore, the information you input will not be saved for the next month.

If you are using this option, please follow the instructions below:

- Click on '*Start a new contribution by editing the data directly online*'.

Fig 5



- Check that the '*Contribution Period*' is correct and click '*Start New File*'.

You will now find yourself on the 'Record Details' screen shown in **Fig 6**.

Fig 6

The screenshot shows a web application interface for 'The Pensions Trust'. At the top left is the logo and name 'The Pensions Trust'. At the top right, it says 'Demo April Contribution' next to a document icon. Below the header are navigation links: 'Return to home screen', 'Return to Manage Contributions', and 'Logout'. The main content area is titled 'Record Details' and contains a sub-section 'Adding New record ID: 1'. This section has two columns of input fields. The left column includes: Member Number, Surname, Forename(s)/Initials, Payroll Number, National Insurance Number, Annual Pensionable Salary, Salary Effective Date, and Contractual Hours. The right column includes: Full Time Equivalent Hours, Hours Effective Date, Monthly Pensionable Earnings, Employee Contributions, Employer Contributions, Additional Voluntary Contributions, and Date of Leaving. A 'Finish' button is located at the bottom of the right column. Below the form is a 'Validation Results' section with four error messages: 'Error: Member Number cannot be blank (Message BlankString).', 'Error: Surname cannot be blank (Message BlankString).', 'Error: National Insurance Number cannot be blank (Message BlankString).', and 'Error: Annual Pensionable Salary cannot be blank (Message BlankString).'

- Fill in the fields with the relevant data.
- Click on 'Finish'.

You will now be taken to the 'Validate Records' screen shown in Fig 7.

Fig 7

The Pensions Trust
Demo April Contribution
Name: PublicWebsite Version: 3.2 Rev: 2 Build: 47

Return to home screen | Return to Manage Contributions | Logout

1 Please check your data before submitting it. Validation results are highlighted below.

Save | Cancel Import | Submit Data

Validate Records

Show only rows matching the following criteria:

Show Errors Show Warnings Show Actions

Containing text: Apply Clear

Edit Selected Record | Add Record | Delete Selected Record | Change Column Mappings

	Member Number	Surname	Forename(s)/initials	Payroll Number	National Insurance Number	Annual Pensions
Edit Select	9110016	Kendrick	AM	N/A	JN110016A	
Edit Select	9110015	Bridges	DG	N/A	JN110015A	
Edit Select	9110014	Roberts	SJ	N/A	JN110014A	
Edit Select	9110013	Wheeler	AL	N/A	JN110013A	
Edit Select	9110012	Dixon	RJ	N/A	JN110012A	
Edit Select	9110011	Roberts	RJ	N/A	JN110011A	
Edit Select	9110010	Smith	RJ	N/A	JN110010A	
Edit Select	9110009	Acomb	SR	N/A	JN110009A	
Edit Select	9110008	Wood	D	N/A	JN110008A	
Edit Select	9110007	Frith	J	N/A	JN110007A	

1 2

Payments Summary

Employee Contributions	£1,782.48	0 field(s) with faults found
Employer Contributions	£3,566.96	0 field(s) with faults found
Additional Voluntary Contributions	£0.00	0 field(s) with faults found
Total Contributions	£5,349.44	

2 When you have checked your data, submit it to The Pensions Trust by clicking the Submit Data button. Should you wish to stop editing and start the process again, click the cancel import button. Click Save if you wish to postpone processing until later.

Save | Cancel Import | Submit Data

- If you only have one member, click the 'Submit Data' button to send the information through to us.
- If you have more than one member, click on the 'Add Record' button and repeat the process until all the member data has been input. Then, click the 'Submit Data' button to send the information through to us.

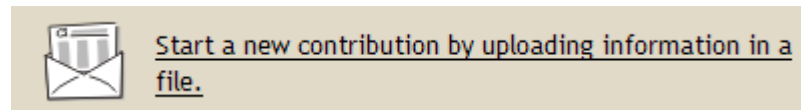
'Start a new contribution by uploading information in a file'.

This option is the most commonly used and the one recommended if you have more than one or two members. It allows you to upload your data from a previously prepared Excel spreadsheet.

The Guide will now assume you have clicked on the *'Start a new contribution by uploading information in a file'* link. Please proceed to **Step 6** if not.

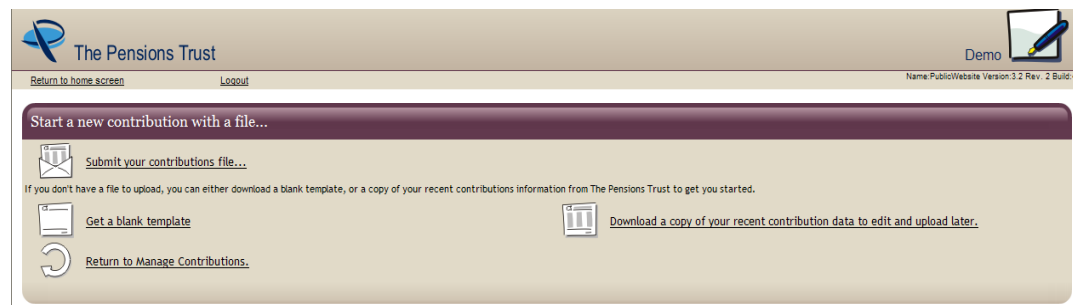
Step 3: Preparing a Spreadsheet

Fig 8



Having clicked on 'Start a new contribution by uploading information in a file' you will be taken to the following screen as shown in **Fig 9**.

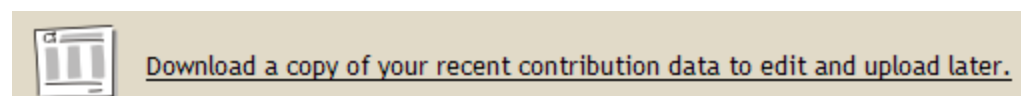
Fig 9



You now have two options on how to complete your spreadsheet.

1. 'Download a copy of your recent contribution data to edit and upload later', as shown in **Fig 10**.

Fig 10



This option is generally the most straightforward, especially if you are using eBusiness for the first time. By clicking on this option, you will receive a spreadsheet in the correct format, but more importantly it is populated with the member data currently held by The Pensions Trust.

- Please check the data is correct and amend it where necessary.

If you are submitting contributions for the first time, you will need to add in the data under column H, Monthly Pensionable Earnings (MPE). This cannot be pre-populated as this is data which has not been loaded onto the system in the past. You do not need to insert MPEs for any members paying into either the Flexible Retirement Plan or the Unitised Ethical Plan but you can enter this information if you wish.

Please note: MPEs is the salary the member has been paid for that month and on which they are paying pension contributions.

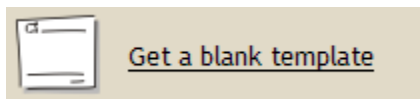
- Please ensure you save this spreadsheet so you can find it later.

Please note: The spreadsheet is open on your system, therefore if you do not save it onto your computer system, any changes you make will be lost.

You should have been provided with an eBusiness User Checklist when you were given your access details to the system use this to ensure the spreadsheet is formatting correctly before you attempt to upload your data.

2. 'Get a blank template' as shown in **Fig 11**.

Fig 11



As it suggests, this opens up a blank .CSV spreadsheet. The headings are all in place, you simply need to input all the data.

Please note: This spreadsheet is open on your system, therefore if you do not save it onto your computer system, any changes you make will be lost.

- Please ensure you save this spreadsheet so you can find it later.

Step 4: Uploading a Spreadsheet

Your spreadsheet is now prepared and saved on your computer system. You can now use this spreadsheet every month, simply update it where required.

You are now ready to upload your spreadsheet in order for eBusiness to validate the data so you can submit it to The Pensions Trust.

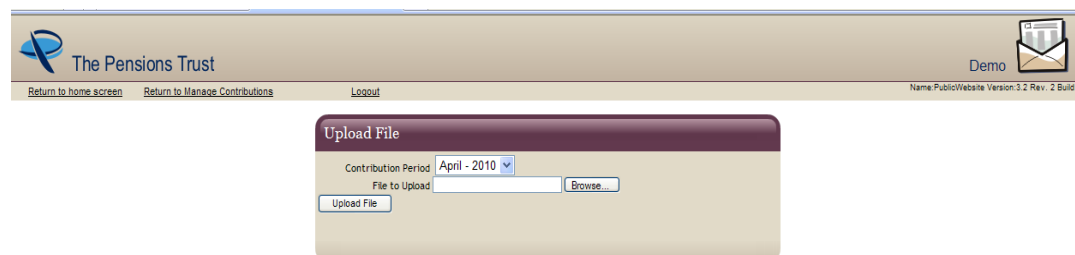
Please note: You may find if you have left the eBusiness system open whilst you prepared your spreadsheet, you may well have been timed out of the system; this is a security feature to prevent anyone else accessing the system.

To get to the point where you upload the spreadsheet, enter your Password again (see **Step 1: To Connect** on page 3).

- Click '*Manage Contributions*'; then
- Choose '*Start a new contribution by uploading information in a file*' (see **Fig 2** on page 4).
- Click on '*Submit your contributions file*' (see **Fig 9**).

You will now be at the screen shown below in **Fig 12**.

Fig 12



This screen should show the next month due.

- Please check you are submitting data for the correct month. If not please contact The Pensions Trust.
- Click on the grey box entitled '*Browse*'. (This takes you into your own system and searches for Excel files.)
- Find your data spreadsheet (remember it will be saved as a .CSV file, so you will need to select '*All Files*' in the '*File Type*' field, not Excel only).
- Double click or open the file and this will insert the file path into the blank box.
- Now click on the grey box entitled '*Upload File*'.

Step 5: Prepare and Upload Contributions

You will now be on the *'Prepare and Upload Contributions'* page. This stage of eBusiness is designed purely to check the column headings on your Excel spreadsheet. It is not checking the data at this point. This screen will only ever display the first three members as a reference.

In order to successfully upload your data the column headings in your spreadsheet need to match the column headings that eBusiness is expecting. We would recommend that you use the blank template (if you are not using *Download a Copy...* as in **Fig 10**) to ensure that the headings are correct. If any of the column headings do not match the grey box entitled *'Import my data'* will be greyed out and you will not be able to continue without corrective action.

There is a section entitled *'Validation Results'* under your data as shown in **Fig 13**.

Fig 13

The Pensions Trust

Demo April Contribution

Return to home screen Return to Manage Contributions Logout

Name: PublicWebsite Version: 3.2 Rev: 2 Build: 47

Prepare and Upload Contributions

Cancel Choose another file

Choose which Pensions Trust field matches your data file column by selecting from the lists below

1

Ignore Surname Forename(s)/Initials Payroll Number National Insurance Number Annual Pensionable Salary Salary Effective Date

Here are the first few lines from your file to help you. The first line of my file contains headers

Member Number	Surname	Forename(s)/Initials	Payroll Number	National Insurance Number	Annual Pensionable Salary	Salary Effective Date
9110016	Kendrick	AM	N/A	JN110016A	15600.00	01-Apr-2005
9110015	Bridges	DG	N/A	JN110015A	38883.00	01-Oct-2001
9110014	Roberts	SJ	N/A	JN110014A	15600.00	01-Apr-2008

2

When you are satisfied that you have selected the correct column matches, click the import my data button

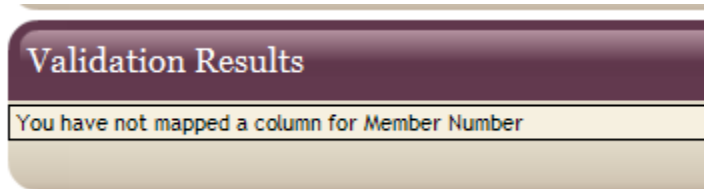
Import my data

Validation Results

You have not mapped a column for Member Number

Details of any columns not mapped correctly will be confirmed e.g. *'You have not mapped a column for Member Number'*, as shown in **Fig 14**. The relevant column will be headed with the word *'Ignore'*.

Fig 14



- Use the arrow to the right of the relevant box to access the drop down list and click on the correct column heading.

Please note: The system will not permit you to select a heading that has already been mapped. When you have completed this, you will notice the grey box entitled *'Import my data'* has now become active.

- Click on *'Import my data'* to take you to the data validation stage.

Step 6: Validate Records

This is the stage where the majority of the work is carried out. You will see a screen listing all the members on the spreadsheet as shown in **Fig 15**.

At this stage, eBusiness checks the data provided and queries anything which doesn't match the data already held or the figures the system expected.

Fig 15

The Pensions Trust
Demo April Contribution
Name: PublicWebsite Version: 3.2 Rev: 2 Build: 47

1 Please check your data before submitting it.
Validation results are highlighted below.

Save Cancel Import Submit Data

Validate Records
Show only rows matching the following criteria:
 Show Errors Show Warnings Show Actions
Containing text: Apply Clear
Edit Selected Record Add Record Delete Selected Record Change Column Mappings

	Member Number	Surname	Forename(s)/Initials	Payroll Number	National Insurance Number	Annual Pensi
Edit Select	9110016	Kendrick	AM	N/A	JN110016A	
Edit Select	9110015	Bridges	DG	N/A	JN110015A	
Edit Select	9110014	Roberts	SJ	N/A	JN110014A	
Edit Select	9110099	Wheeler	AL	N/A	JN110013A	
Edit Select	9110012	Dixon	RJ	N/A	JN110012A	
Edit Select	9110011	Roberts	RJ	N/A	JN110011A	
Edit Select	9110010	Smith	PJ	N/A	JN110010A	
Edit Select	9110009	Acomb	SR	N/A	JN110000B	
Edit Select	9110008	Wood	D	N/A	JN110008A	
Edit Select	9110007	Frith	J	N/A	JN110007A	

1 2

Payments Summary

Employee Contributions	£1,782.48	0 field(s) with faults found
Employer Contributions	£3,564.96	0 field(s) with faults found
Additional Voluntary Contributions	£0.00	0 field(s) with faults found
Total Contributions	£5,347.44	

2 When you have checked your data, submit it to The Pensions Trust by clicking the Submit Data button.
Should you wish to stop editing and start the process again, click the cancel import button.
Click Save if you wish to postpone processing until later.

Save Cancel Import Submit Data

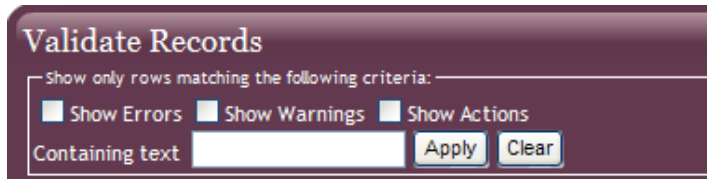
There will not necessarily be queries on the data everytime, but if there are, the system will not let you progress until you have amended or confirmed your data.

If the system has queries, the 'Submit Data' box will be greyed out, as shown above.

Also on this screen there are three grey boxes at the top and bottom of the screen, entitled 'Save', 'Cancel Import' and 'Submit Data'.

Rather than having to work through the whole list, the system allows you to filter the members there are queries on. As shown in **Fig 16**, under the area that says 'Validate Records' there are three small boxes, entitled 'Show Errors', 'Show Warnings' and 'Show Actions'. You can click on the boxes to put a tick in them (you can do this one at a time or put a tick in all of them). This will provide you with a list of the members with queries only.

Fig 16



Validations are broken down into the following categories:

Warnings will not prevent you from submitting. They are simply things the system would like you to be aware of, such as a member who has not had a salary increase for twelve months.

Actions refer to data that the system would like you to confirm or explain, for example, a salary decrease or an amended National Insurance number. To satisfy actions, you will need to check your records and either amend the data, confirm the data is correct or provide an explanation.

Errors refer to data that the system has identified as incorrect, for example, a National Insurance number in an incorrect format. You will need to amend the data to proceed.

On each row of data at the very left-hand side of the screen, are the words underlined, 'Edit' and 'Select', as shown in **Fig 17**.

Fig 17

	Member Number
<u>Edit</u> <u>Select</u>	
<u>Edit</u> <u>Select</u>	

- Click on 'Edit' on the member at the top. This takes you into the individual member's data as in **Fig 18**.

Fig 18

The screenshot shows the 'Record Details' section for 'Editing Record ID: 1'. The form contains the following fields:

Member Number	9110016	Full Time Equivalent Hours	35.00
Surname	Kendrick	Hours Effective Date	01-Aug-2000
Forename(s)/Initials	AM	Monthly Pensionable Earnings	1300.00
Payroll Number	N/A	Employee Contributions	65.00
National Insurance Number	JN110016A	Employer Contributions	140.00
Annual Pensionable Salary	15600.00	Additional Voluntary Contributions	0.00
Salary Effective Date	01-Apr-2005	Date of Leaving	
Contractual Hours	35.00		

Buttons: Finish, Delete, Save

Navigation: No Previous Records, Next

Validation Results

Warning: The Effective Date (01/04/2005) is more than 1 year in the past. (Message X7).

Action: The Monthly Pensionable Earnings you have provided indicate that the Employee Contributions should be £65.00, based on a contribution rate of 5.00%, and the employer contributions should be £130.00, based on a contribution rate of 10.00%.

Please amend your pensionable earnings/contributions as appropriate. Alternatively, please confirm the information is correct and provide the reason for the different amount. (Message 209c).

This data is correct

Reason for Change: Choose...

Effective date:

The information supplied will be recorded onto The Pensions Trust systems. Please note if the effective date is a date in the past then you will need to ensure that previous contributions have been paid at the correct rate.

Confirm

The query will not only be highlighted in a different colour, but in the 'Validation Results' section underneath the member data, there will be an explanation of what the system is unsure about.

- If you need to amend the data, simply click in the relevant data box, type in the correct information, then either press tab or click outside the box to revalidate the data. If the data you have provided is correct, please put a tick in the 'This data is correct' box in the 'Validation Results' section and follow the rest of the instructions underneath.
- When the system is happy with what you have done, the shading on the data will disappear.

Just above the 'Validation Results' section are two grey boxes entitled 'Previous' and 'Next', as shown in **Fig 19**. This allows you to work through each member query, one at a time.

Fig 19

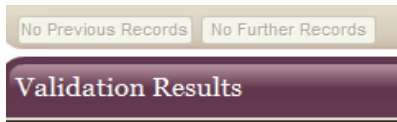
Buttons: Previous, Next

Validation Results

- Work through all your validation queries using the 'Previous' and 'Next' buttons where required.

Once you have completed all queries, the 'Previous' and 'Next' boxes will say 'No previous records' or 'No further records', as shown in **Fig 20**.

Fig 20



- At this point, click on the grey box entitled 'Finish' to return to the 'Validate Records' screen.

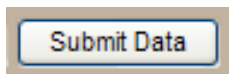
Please note: When you click 'Finish' the system will automatically save your progress.

You will now be back at the screen shown in **Fig 15** on page 15.

- If you untick the 'Show Errors', 'Show Warnings' and 'Show Actions' boxes all of the members will now reappear.

The grey box entitled 'Submit Data' should now be active, as shown in **Fig 21**.

Fig 21



Check the 'Payments Summary', to make sure the amount is what you are expecting to pay.

Fig 22

Payments Summary		
Employee Contributions	£1,782.48	0 field(s) with faults found
Employer Contributions	£3,564.96	0 field(s) with faults found
Additional Voluntary Contributions	£0.00	0 field(s) with faults found
Total Contributions	£5,347.44	

Your submission total **MUST** match the amount you pay, as The Pensions Trust can only process the contributions if the figures match exactly. If there is a discrepancy, no matter how small, you will need to amend your submission, make good any shortfall or the payment may even be returned.

- Please now click on the grey 'Submit Data' box as shown in **Fig 21**.

'Missing Members.'

If you have missed any members off your submission, the system will flag them up at this point.

Fig 23

Missing members

You have chosen to submit your data, please confirm if you wish to continue. Please be aware that until The Pensions Trust has processed these contributions you will not be able to submit contributions for next month. The data that you submit today will still be available via the 'Pick up where I left off function' until the contributions have been processed.

For this contribution period we require the following members to be present. Please add these members to your data. If these members are non payers then set contributions to zero to continue:

eBusiness can automatically populate missing records in your data, setting contributions to zero. These records may generate Actions that you must resolve before the submit button will enable.

Member No	Surname	Nino
9110016	Kendrick	JN110016A

You can either use *'Return'* which will take you back to the screen shown in **Fig 6**, on page 7, and you will be required to add the missing members onto your submission manually using the *'Add Record'* or *'Add missing members and return'* buttons.

We would recommend that you use the *'Add missing members and return'* button as with this option the system will fill in the data for you and populate the contribution fields with zeros.

Submitting your data, as shown in Fig 24.

Fig 24

The screenshot displays two sequential screens from a web application. The top screen, titled "Leavers discovered via Contributions", informs the user that leavers from a contributions file will be automatically added to the leaver process. It includes a table with one entry for MemberNo 9110003, Surname Scott, Date of Leaving 01-Apr-2010, and Status Leaver - Pending Actions. The bottom screen, titled "Please confirm you wish to submit", provides a warning that submitting data will prevent further submissions for the next month and offers "Confirm" and "Cancel" buttons.

Leavers discovered via Contributions

The following leavers were discovered in the contributions file and will be automatically added to the leaver process. ?
If the leaver has already been processed then you will not need to process them again.

MemberNo	Surname	Date of Leaving	Status
9110003	Scott	01-Apr-2010	Leaver - Pending Actions

Please confirm you wish to submit

You have chosen to submit your data, please confirm if you wish to continue. Please be aware that until The Pensions Trust has processed these contributions you will not be able to submit contributions for next month. The data that you submit today will still be available via the 'Pick up where I left off function' until the contributions have been processed.

Note your data contains warnings.

If you do not have missing members, or once you have dealt with your missing members, the next screen will display any leavers identified from your submission and ask you to confirm you wish to submit.

- If you are ready to submit, please click on the 'Confirm' box.

Remittance Advice, as shown Fig 25.

In the next screen you can go onto processing a leaver, print off a Remittance Advice (if you pay by cheque) or download the Remittance Advice for your records.

Fig 25

The screenshot displays two sections of a web application. The top section, titled 'Information Submitted Successfully', contains a message: 'Your data has now been successfully submitted to The Pensions Trust. To Download a copy of the Remittance Advice for your records [click here](#).' Below this is a table with three rows: 'Total Contributions' (£5,152.44), 'Total Charges' (£0.00), and 'Expected Payment' (£5,152.44). At the bottom of this section are two buttons: 'Remittance Advice History' and 'Finished'. The bottom section, titled 'Pending leavers', contains the text: 'The members below are all leavers that require processing:'. Below this is a table with the following data:

Member Number	Employer Number	National Insurance Number	Title	Initials	Surname	Date of Leaving	Process Leaver	Un-register Leaver
9110003	20100	JN110003A	Mrs	ED	Scott	01-Apr-2010	Process...	Unregister...

- To print the Remittance Advice choose the 'click here' link as shown in Fig 26.

Fig 26

Your data has now been successfully submitted to The Pensions Trust. To Download a copy of the Remittance Advice for your records [click here](#).

The Remittance Advice document will now be displayed you can:

- print the full Remittance Advice document; or
- print '*Submission Details*' section only.

Fig 27

The Pensions Trust *Remittance Advice*

Employer Details
Scheme: **NON-FRP**
Employer Name: **Demo**
Employer Number: **20100**
Contribution Period: **April 2010**

Payments Summary
Total Contributions: **£5,152.44**
Total Charges: **£0.00**
Expected Payment: **£5,152.44**

Submission Details
Employer Name: **20100**
Employer Number: **20100**
Contribution Period: **April 2010**
Total Employee Contributions: **£1,717.48**
Total Employer Contributions: **£3,434.96**
Total Additional Voluntary Contributions: **£0.00**

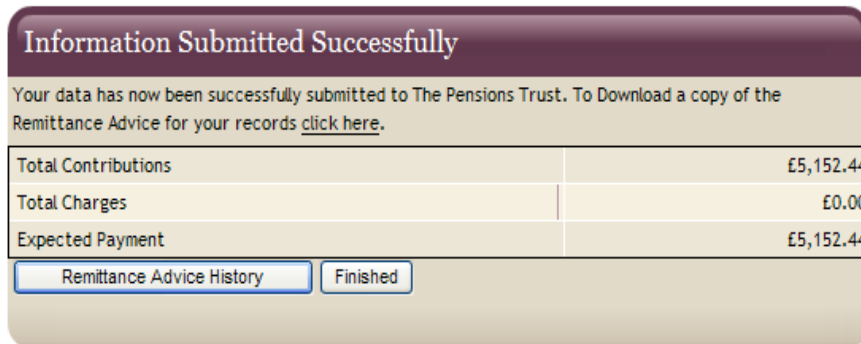
- Click '*Close This Page*' to close the document and return to submitting your contributions.

Completing the submission process

- Once everything is complete, click on the *'Finished'* button.

The data will now be held by The Pensions Trust and will be processed onto the members' records once the matching payment is received.

Fig 28



The screenshot shows a confirmation message with a summary table and two buttons. The table lists 'Total Contributions' as £5,152.44, 'Total Charges' as £0.00, and 'Expected Payment' as £5,152.44. Below the table are buttons for 'Remittance Advice History' and 'Finished'.

Information Submitted Successfully	
Your data has now been successfully submitted to The Pensions Trust. To Download a copy of the Remittance Advice for your records click here .	
Total Contributions	£5,152.44
Total Charges	£0.00
Expected Payment	£5,152.44

[Remittance Advice History](#) [Finished](#)

Please note: Until the contributions are processed at The Pensions Trust, if necessary you can access your submission again via *'Pick up where I left off'* shown in **Fig 3** on page 5, where you can amend and resubmit if necessary. Once the contributions have been processed, you will be unable to access the contributions for two days to allow the figures to be fully extracted onto the member records.

Automatic emails

Once contributions are processed, the primary payroll contact at your organisation will receive an email confirming this and informing them that the system can be used to submit the next month's contributions.

In addition, if either payment or data is outstanding on approximately the 8th of the month, an automated reminder email will be issued.

The deadline for The Pensions Trust to receive both payment and data is the 14th of the month following the month for which the contributions are being deducted i.e. contributions deducted from April's salary are due with us by the 14th of May.

4.0 Leavers

You will now need to inform us of your leavers online, and in some cases submit the form online as well.

Please note: If the member has died you should contact us immediately. For members who are retiring you should still contact us three months in advance. You will still need to fill in the form separately as additional information is required in these cases.

You will notice that the final column on your spreadsheet is headed '*Date of Leaving*'. If you have a leaver, simply insert the date of leaving here and upload it with your normal contributions. At the end of the submission, the system will identify your leavers and if you have permissions to process leavers, it will give you the option to process or unregister.

Please note: Once you have processed your leaver form you will not be able to submit further contributions for them, therefore if you have subsequent contributions to upload you should not process the leaver form immediately. You have up to two months to process the leaver, which can be accessed through '*Manage leavers*' and '*View Pending leavers*'.

'*Pending leavers*' as shown in **Fig 29**.

Fig 29



The screenshot shows a web interface titled "Pending leavers". Below the title, it states "The members below are all leavers that require processing:". There is a table with the following columns: Member Number, Employer Number, National Insurance Number, Title, Initials, Surname, Date of Leaving, Process Leaver, and Un-register Leaver. A single row of data is visible.

Member Number	Employer Number	National Insurance Number	Title	Initials	Surname	Date of Leaving	Process Leaver	Un-register Leaver
9110003	20100	JN110003A	Mr	J	Scott	01-Apr-2010	Process...	Unregister...

When you click the '*Process*' button, you will proceed to a pre-requisites screen that will be pre-populated with the date of leaving.

- You will need to select the reason for leaving and confirm that the last contributions have been submitted.
- Once you have confirmed the last contributions have been submitted you will be able to click '*Confirm and Process*'.

Where the member participates in the Flexible Retirement Plan no further information is required. For members who participate in all other schemes if the member is either leaving employment or withdrawing from the scheme, you will be taken through a '*Personal Details*' screen and a '*Salary and Hours History*' screen. These screens will be pre-populated with the data we hold; you just need to check the data and either confirm it is correct or amend as necessary.

After these screens, if the member is contracted-out you will proceed to the '*Contracted-Out Earnings*' screen where you can fill in the relevant figures for the member. Once you have done this, or if the member is not contracted-out, you will see a summary of all the data you have entered/confirmed.

- You can print this for your records if you wish and then click '*Process*' to send the information through to us.

Once you have done this, your leaver process for this member is complete.

5.0 Internal Transfers

To register an internal transfer:

- Go to '*Manage Internal Transfers*' and then '*Register Internal Transfer*'.

You will start from a pre-requisites screen:

- Confirm if the member is based overseas by ticking the relevant box.
- You also need to enter the date of leaving, the previous Employer and the Member Number.
- Then click '*Continue*'.

The system will check that the Member Number is valid, and then open up fields for you to enter the '*Surname*', '*Date of Birth*' and '*National Insurance Number*'. Click '*Continue*' again.

At this point the system checks that you offer the scheme they were in with their previous employer.

Please note: A member can only internally transfer between employers that offer the same scheme. In addition, Growth Plan Series 3 members are never eligible for internal transfers. If you do not offer the relevant scheme, you will not be able to proceed and you will need to fill in an enrolment form for the member.

Assuming you do offer the relevant scheme:

- Enter the members '*Surname*', '*Date of Birth*' and '*National Insurance Number*' and click '*Continue*'.
- You now need to enter the date the member has joined your organisation.

Please note: The member cannot have a gap between employments that exceeds 30 days. If they do, you will not be able to proceed and you will need to fill in an enrolment form for the member.

- Assuming they are transferring within 30 days, you should now be able to click '*Confirm and Process*'.

The next screen will show the personal details we hold for this member.

- You will need to check this data and amend as necessary.
- You will also need to fill in some employment information such as salary, hours and benefit structure (if applicable).
- Once both you and the system are happy with what you have entered, click '*Next*'.

Once you have done this, you will see a summary of all the data you have entered/confirmed.

- You can print this for your records if you wish and then click '*Process*' to send the information through to us.

At this point the system will confirm that the internal transfer has been registered and will provide you with a link to a form. This form is a pre-populated version of the paper internal transfer form that we use, and requires a signature from both the employer and the member.

This form must be returned within six weeks for the internal transfer to be complete.

Please note: The system will update with the information you have provided within 24 hours so you do not have to wait for the form to come to us before you can start submitting contributions for the member. If the form does not arrive within six weeks however, we will need to cancel the internal transfer, and any contributions that have been sent through will have to be returned to you. The primary payroll contact will receive fortnightly email reminders until the form is returned.

6.0 Contact Us

Should you have any difficulties or queries please contact the relevant Helpdesk on:

For the Social Housing Pension Scheme (SHPS) or the SFHA Pension Scheme:

Tel: 0845 121 7238

Email: ebusinessassistance@thepensiontrust.org.uk

For all other schemes:

Tel: 0845 123 6200

Email: helpme@thepensiontrust.org.uk



The Pensions Trust

Verity House, 6 Canal Wharf, Leeds LS11 5BQ
tel: 0113 234 5500 fax: 0113 234 5599

email: enquiries@thepensiontrust.org.uk
or visit www.thepensiontrust.org.uk