i-Connect Demonstration Training: Video Transcript

Intro, Housekeeping, Outline [00:00]

Good morning everybody. Thanks for attending this i-Connect training for the employers. Just to introduce myself, my name is John Wheeler. I'm the i-Connect Manager and I've got with me, Jennifer Davidson, who's also going to be doing a presentation today. Just to let you know, this event is being recorded, which is why you're not able to access your cameras, just for... security reasons. Your microphones are automatically turned off. There will be a Q&A at the end of the training, so if you do want to ask a question, you can just unmute your microphones.

I think that is about it, so, I am going to pass you over to Jennifer now; for her to begin the training. **["Okay, sorry about that." "No, you're all right."**] So we're just - this is going to be the agenda for this meeting today. So I'm going to go through the first three points and then John will go through the Refresher Training with you all.

i-Connect to Date [01:20]

So, we're just going to go through to the first one there, i-Connect To Date. So, this is how we are sitting; currently we have 80% of the employers that are all on i-Connect. There's only one that is left to go on online returns. The rest are all extract employers; of 125 online employers and 11 payroll extract employers to date; still doing the process of that, so, hopefully we'll get everybody on soon as possible.

Release Update [01:50]

The next one is the i-Connect release date. So we haven't had a release since May 2024, that's mainly because the i-Connect development team has been seconded to the Pensions Dashboards work in Heywood. I think you've probably already heard about the Pensions Dashboards. So, that's been put on hold for a while; we don't have an exact date of when it's going to be - put - you know the next release is going to be put through, so, there's no known issues that we have that have been fixed, so one possible issue that you may know about, is on the i-Connect screen, if there's when you've put your i-Connect submission through on the bottom right, sometimes

your figures don't match, but that's because there's leavers, and the leavers figures haven't been included in the year-to-date figures. So, hopefully, we'll get all our ideas that are on Heywood's... ..What's the name of it again, John? Aha, isn't it? Aha. Yes. There's lots of ideas on there for to improve - the i-Connect submissions, so hopefully, they'll get that sorted as soon as possible and get some of those on for everybody. Yes, so there's, I say, there's no confirmation for the next release date, so hopefully it'll be soon. Hopefully, we're hoping next year, so fingers crossed.

New and Future Developments [03:20]

And so, we have a feature on i-Connect; some of you actually know about it, It's called Shared Documents. We are trialling it with a couple of employers. So, it's very useful because you can actually send secure documents through i-Connect and it's-it's kept on there; you've probably noticed that, whenever a secure email's sent through Mimecast, it does disappear after about 30 days, so if you haven't saved anything on there, it'll be gone. So this is really handy for anybody that needs to have information to hand. So, we're currently testing it with a few employers, and it has been fairly successful so far.

So, the other, the other thing we have, is Upload of Individual Member Documents. So what this does is, instead of sending through, LGS15s to the likes of the LGS15 inbox, that type of thing, or service break forms to the admin1 inbox. You can actually upload these onto the member's record on i-Connect, so you would just search them up through their national insurance number, and then you can upload that document; then what'll happen is, it'll create a task on our - the member's record, and we can do what we need to do in the background then. And it's handy as well because there's actually a Document section, in the Altair - on the member's record, and you can go in and flip through all the documents, so everything's saved there as well.

So at the first quarter of next year, Heywood have - they're hopefully going to be introducing multi-factor authentication. I have mentioned it to a couple of employers, just to let them know, but this really is extra security for your login for i-Connect, so you'll either be able to use an email or a mobile phone; I think they prefer mobile phones, but email is always an option, and it will be on there, and it's - it'll just be like a one-time passcode that'll be sent to you, so that you can get logged on. So, yeah,

that's - that's pretty much all we've got, for like updates from Heywood and anything new that will be happening.

Refresher Training Intro [05:40]

And then next on the agenda is going to be John. He will be doing the Refresher Training. So, I'll hand that over to you John. Thank you, thanks Jennifer. Morning everyone. So just going to go through a few things with i-Connect. How to do a few things; both using the online return and also the payroll extract.

New Starters [06:03]

So the first thing, New starts. As you - as you know, any record or any member with multiple post – posts in your employment; they require separate pension records. With regards to creating a new start online, all you need to do is, click on the "Add New Starter" in the member list, which you see when you go into the online return. Once you click on that, you will be asked to update all of the employee - the member's details. We ask for you to complete all sections that are relevant to that - that employee. We had a few people at the beginning; maybe not fully completing addresses, things like that, so we do ask you just to make sure that everything is completed.

Also with new starts, we require the Payroll Reference 3 to be different to anything else that you have for another record. So if you have 2 classroom assistant posts for one member, you can have that as classroom assistant one and classroom assistant two. For the payroll extract; slightly different, there is different columns that need to be completed. So on the extract it needs to be columns AK, AL, AN and AO. Now these are only completed on the initial submission, when a-a member starts. For any... any extracts after that, they need to be left blank. So you're looking at annual pensionable salary that should be the actual pay they are getting paid when they start that job. It's different to the full-time equivalent. It's for - so for part-time members, you would put the part-time pay in, rather than the whole time pay...

Service Breaks [08:21]

For Service Breaks; for the online return, there's no change to what you would have done if you had been on - before i-Connect. So when a break starts, you have to

complete an LGS34 form to let us know, the date of the break. And when it ends, you just need to complete an LGS35.For the payroll extract, we don't need LGS34s and 35s; all those breaks are done on the - the extract. So, when the break starts, you complete column Z with the date that the break started, and you also enter the reason in column AC.

Now, you should have a - a payroll extract spec that was sent out to all of our employers before you came onboard i-Connect. And they have all the reasons for the employment breaks listed on there. The following submission; those columns will be left blank. They only need to be recorded once for - for - when a break starts. And when a break ends, you just need to put a date in column AA. And again, that only needs to be done once.

Opting Out of the Scheme [09:48]

So, Opting Out of the Scheme. For the online return if you have less than three months on the Leavers page, you need to tick the "Opt Out box" on the right hand side. That creates a task on our records, and we know that you are doing the internal refund through your payroll. And because you're doing an internal refund, the contributions - the total cumulative contributions for both employee and employer could actually put through as negative values, to show that they have all been refunded... If there is an opt out and it's more than 3 months, you can't put it through the "Opt Out tick box". You have to select a reason for the leaving, on - from the drop-down menu. So you'll put a date that they opted out, and then click on "Opt Out" in the drop-down box. That creates the task on the member's record to know to let us know that we need to do the - the refund...

On the Payroll Extract. If your member is less than 3 months, you tick, or you put in, the opt out date in column AX. And again, that lets us know that we need to do the - or that lets us know that you have done the refund. And again, contributions should be put through as negative values, so the cumulative figures should be totalling zero. And if it's more than 3 months, you just put it through with a leaver -- in column V; the date and a reason for leaving as "Opt Out" in column BE. And don't forget, this is only for opt outs.If a member resigns within 3 months, the employer cannot do the refund. It has to come through NILGOSC...

Leaving the Scheme [11:56]

So, Leaving the Scheme. The Online Return. You just put the date they left the Scheme, and then there's a - a number of reasons for opt out... for leaving. If, one of the reasons is not shown in the drop-down box, if you just put "Other", and then there's a further box to the right of "Select Reason", and you can actually type in the reason there. On the Payroll Extract. Again, you put in the date of leaving in column V and then the reason in column BE...

Retiring from the Scheme [12:44]

So, Retiring from the Scheme. The LGS16 the form that is sent in, in advance of retirement. That still is getting sent in as per normal, and if the - if you are choosing to waive any reductions ,again, you have to send in the LGS13 as per normal. Now it says 3 months in advance, but obviously, we understand that sometimes people give short notice when they're retiring. So, it's 3 months in advance or as soon as possible if it's less than the 3 months. So the date so the date of leaving and the reason, again, it must be entered on i-Connect. Even if you're sending in an LGS15, they must be put on i-Connect as a leaver as well...

So, for Flexible Retirement. Flexible retirement is slightly different. It doesn't work 100% on i-Connect. We have to do a little bit of manipulation to ensure that it - that the flexible retirement comes through. So again, you put the date of leaving on i-Connect and you select the reason; it's "Flexible Retirement". You'll put that on the - for the payroll extract, you'll put that on the line of... the job that's ending. You will then need to enter the new post, the reduced hours post as a new start... on the same submission.

So on the payroll extract that has to be down as a - on a separate line, and in the online return you have to create a new start to enter the reduced hours post. And also, the Payroll Reference 3; it must be slightly different to the - to the previous one or else i-Connect will basically refuse to-to create a new start because it will just say that it's-it's - it's recognised as the same post as the previous one. So a lot of our employers, simply add flex at the end of the Payroll Ref 3 just to distinguish on i-Connect that it is, a flexible retirement...

Arrears of Pay [15:26]

So, Arrears of Pay. For the Online Return you can submit arrears of pay in two different ways... So, you can actually put the arrears of pay through i-Connect if the record is still on the return. So we may have a case of someone who has left, and you know that a pay award is being processed within the next 2 or 3 months. If that is the case, you are allowed to keep that member on i-Connect, and you can put the arrears through that - the i-Connect submission. However, we plea - we ask you not to keep the member on i-Connect for any longer than 2 or 3 months. If somebody has already been removed from a - from the online return, the only way you can submit the arrears is through a revised LGS15.And on the payroll extract, a revised LGS15 is the only way that you could submit arrears.

If someone has been removed from i-Connect, and arrears come through, please do not create a new pension record on i-Connect. It will just cause huge complications for us to - first of all, to recognise that it is a - arrears rather than a new start. And, like I say, we will have to unwind a few things to-to get the arrears put onto the correct record,so please do not create a new record to submit arrears.

Member Updates [17:28]

So, Member Updates. There's a lot of updates that you can do on i-Connect, which will update the member's record on our system. So the likes of, any name changes ,if there's a change of date of birth, so maybe something has been entered incorrectly to begin with, you're able to change that on a - on i-Connect. Someone gets married, or divorced, you can change the partnership status and the title on i-Connect as well. Job title, if someone's job title changes, you can amend that.

There's a lot of people on the online return when it was - when the transfer - was done over to i-Connect that there was no job titles present. Now our new online system "Engage", actually uses the job title to identify the post for the member. If anybody's been on Engage, you'll see that it's-it's under the actual post - the job title. So what we're going to ask is, possibly not all at once, but if you could maybe update a few job titles each time you do a submission on the online return. Not only will it help us, but it will also help - really help our members who are signed up to Engage,

to actually identify what the... correct post is, and things like address, contact details. You can do all those updates on i-Connect as well...

The only updates that you can't do on i-Connect is the national insurance number and any changes to pay - Payroll Reference 2 & 3. If that is the case, if there's any changes like that, what we ask you to do is, email the i-Connect team before your next return is submitted because what we have to do is, not only amend our database, but we also have to update the member's details on i-Connect. So, any changes like that, email them through. We actually do have a spreadsheet if anybody wants a copy of that. All you do is, just list the details and what the new payroll references should be, and then you can up - send that into us, and we can do an update on that...

Now, Continuous Employment. We get quite a few members who maybe, where a post ends, and a new job starts straight away. It's very much down to yourselves whether you treat that as continuous employment or not. Some employees do, some employees don't. If treated as continuous employment, rather than entering a date of leaving and creating a brand new post, we may be able to just treat it as continuous employment by doing an up - an hour change and also a change of the payroll references. So if you have anything like that, and you're not sure whether it should be continuous employment or not, you can just contact us, and we can speak to you about that, and give you any - any advice, if needed. We've noticed there are quite a few people where um a new post has been created unnecessarily, when it should just – just have been continuous employment, so it would help us to-to clear members' records up, and also it would help the member as well.

Common Errors [21:36]

So, next thing we're going to have a look at, is Common Errors on the submission. so these are the things that have come up time and time again which we'll... go through, and hopefully sort out for you, exactly what needs to be done.

Assumed Pensionable Pay [21:56]

So the first one, APP, everyone's favourite. So APP is calculated when a member goes on any reduced pay, or no pay sick, or reduced pay maternity. The

pensionable pay that is included on i-Connect; it must include your APP calculation, and it must be added to - to the - to the CARE pay on the i-Connect submission. So the employer pays the contributions on the total amount of pay and APP; however, the member only pays the contributions on the reduced amount of pay. We run an error report every week and I would say 90% of the issues on that, are to do with APP. It is getting better, but still, it's - you know -there is the same APP problem - problem calculations every now and then.

If you're unsure of how to calculate APP or you're not - you just want a refresher, or anything like that, there is an explanation on the Payroll Guide. We will send you all these slides - after the presentation today. And there's a link directly to their - to the Payroll Guide It's in section 6.6.1. Anyway, if anybody wants to go and have a look at that.

Submission Errors [23:38]

So, Submission Errors. They occur for one of the following reasons; there are lots of reasons, but I've just picked out the three most important ones.

So, the first one is, if there's an incorrect Pay Reference on the submission. So for example, the has changed, and NILGOSC has not been informed of the change, it will throw out a submission error...

Next one is, if new starter details do not match what any records that we already hold, so say for example, an employee had a previous record with a previous employer; you create a brand new starter, and there's a slight difference to the change - to the surname, or the national insurance number or the date of birth, it will not allow that member to be created as a new starter; it will throw out an error.

And the third one is, the part-time effective part-time hours effective date is not after the current employment date, so say there's been a change of contractual hours, you may well have changed the hours on the - on the submission, but maybe the date - the change hasn't been updated It will then throw out an error because it notices a date of - a change of hours, but the date had nought after the - the current date. So, an error can be identified when you're actually doing your submission. So, normally, the progress bars on the right-hand side of the submission; they will turn green. However, if there is an error created, they will turn red. And if you notice the - on the

- the example there, there's number one on the errors there. If you were to click on that, on the submission, it will actually give you the national insurance number details of who is actually in error. So, if you do have anything like that, please, email the i-Connect team as soon as you can because what we need to do is investigate the reason, for that. And we'll obviously work with you to make sure that anything has changed, so the next submission, things will go through correctly.

Not Removing Leavers [26:30]

Okay... the next issue we-we have, is not removing any leavers from the member list. Now this only affects the online return. Then that's the only one where you see the actual active member list before the submission is-is processed. So, when someone leaves, you should remove the member from the - from the active member list, unless there's an immediate payment of arrears due within the next 2 or 3 months. So the way it looks is, in the member list, the status for that member will be non-active, and there will be a "Remove button" present, next to it.

So what we're asking you to do is, click on that "Remove button" to remove that member from the - the member list. The reason we ask you to do this is, it does cause some issues if a member rejoins employment in the future. We have had in the past, somebody who's left, the "Remove button" hasn't been clicked, so that member has been still present on i-Connect, and their status is non-active. When they've rejoined, the employer has automatically started adding the figures to the non-active post. What should be done is, a new post should be created instead, and then the member because they will have a previous record in this - in the Scheme, they'll have the option if they want to, to combine the records. So don't automatically put the postings onto the - the current - on the - the old record...

Aggregating Previous Records [28:39]

So, the next one we have, is Aggregating Previous Records, so the member rejoins a Scheme, and has got previous employment, and opts to combine the new record with the old record. What NILGOSC has to do is; we need to break the link from the new post, and link all those postings, so they go to the old record. So, on the online return, the employer doesn't actually have to do anything because we can do that

unlink and relink ourselves. However, it's on the payroll extract. We can break the link, but it's down to the employer to relink the record on the next submission.

So, on the next submission, when you click "Upload", an additional page will - will be shown before you actually get through to the normal page, for the submission. And what it will be is, there'll be a member matching issue, and anybody who needs to be relink, they will be shown as the members "Found in Conflict". So basically that - that means, we have a record and it's not linked, so i-Connect is asking you to do that yourself. So all you need to do is, click on "View Next Conflict", and it takes you to the next page, and it'll - it'll show you something like this.

This is from the actual i-Connect manual. The top part is the payroll member, so that is the details that are on the actual upload on the extract, and it's looking at a - a potential match on our target system which is our database. Now, what will normally happen is, all of those - different sections will be green rather than this-this example where the surname is slightly different. So, all you need to do in this case, is click on the circle next to the Payroll Reference, and then click on "Confirm Member Match", and once all the records have been relinked, members found in conflict, and the progress bar, should be green. Once you see that, if you just click on "Confirm Matching Complete", and that will be all of those members relinked together.

Remittance [31:52]

So the last section we're going to talk about, is, Remittance. Okay, so we're still asking LGS6 forms to be sent to the finance department. On the last part of the submission, it will detail the amount of payments, the contributions that are shown on the i-Connect submission, and then we'll ask you for the total payments to be made. Now... what we have noticed for a lot of employers is, they are just putting the same figure, as is shown on the i-Connect submission. What you actually need to do is the - enter the total payments that you have been made - that has been made to our finance department.

Now that might be slightly - slightly different to what that that figure is on i-Connect, but it's - it's a way for our finance department to actually reconcile the figures correctly. If there is a difference between the two figures, there's a-a box to for you to do a little short explanation for the reason for the difference. So, it's something we've

noticed our finance department is really starting to crack down on now. So they are, they're really double-checking this. So, any differences in the future; we will - we will be contacting you whether it's the i-Connect team or the finance team, but you will be contacted to explain the reason for the difference Like I say, it's - it's to do with reconciling, and rather than waiting till the end of the year to-to try and reconcile; it's something that's going to be done each month from now on.

Closing [34:02]

And that is the end of the presentation this morning. Thank you very much.