

# Norfolk Pension Fund i-Connect



**Local Government Pension Scheme**

## Employer Guide to i-Connect Online Returns

Issue 5 : Mar 2022

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## Introduction

This guide describes how to use i-Connect to send information about Local Government Pension Scheme (LGPS) members to the Norfolk Pension Fund.

i-Connect is an Internet application that helps to manage the transfer of employee information from payroll providers to pension administrators.

It will be the responsibility of employers and payroll providers to use i-Connect to submit a return for each payroll period (normally monthly) by the agreed cut-off date.

The guide will cover the following areas involved in completing and submitting an Online Return:

- Logging on to i-Connect
- Home page
- Completing an Online Return
  - Member page
    - Members expected on the return
    - New starters
  - Member Pay and Contributions – This Period values
  - Member Pay and Contributions – Year to Date values
  - Member Additional Contributions
  - Member Service (Hours changes)
  - Member Personal Details
  - Member Contact Details (Address changes)
  - Member Leavers and Opt-Outs
- Submitting an Online Return
  - Latest Upload (Events Summary)
  - Sending the data to the Norfolk Pension Fund
- Reporting
- Document Upload
- Other Actions to carry on doing after joining i-Connect

## i-Connect Login Page

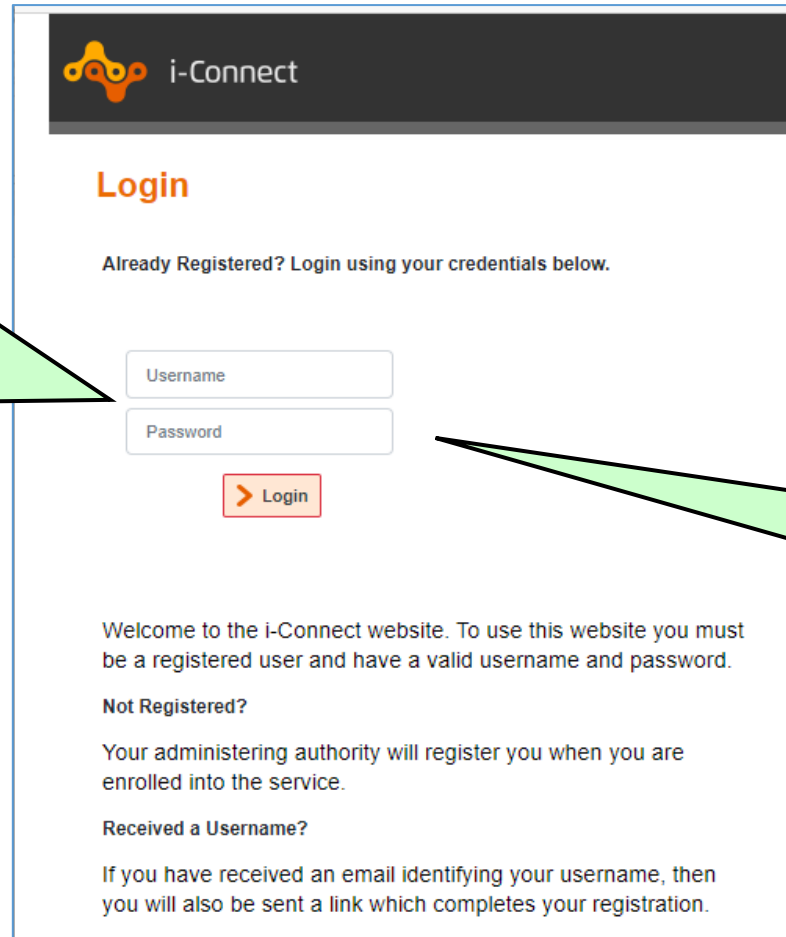
The initial log in page for i-Connect is:

<https://app.i-connectdata.co.uk>

### First time logging in?

When an account has been set up for you on i-Connect, you will receive an email containing your **Username** and an **Activation Link**.

Please click the Activation Link in order to set up your i-Connect **Password**



The screenshot shows the i-Connect login page. At the top is the i-Connect logo. Below it is the heading 'Login'. A message says 'Already Registered? Login using your credentials below.' There are two input fields: 'Username' and 'Password'. Below these is a red 'Login' button with a right-pointing arrow. Further down, there is a welcome message: 'Welcome to the i-Connect website. To use this website you must be a registered user and have a valid username and password.' Below this are three sections: 'Not Registered?' with instructions to contact the administering authority; 'Received a Username?' with instructions to click an activation link in an email.

**Login**

Already Registered? Login using your credentials below.

Username

Password

> Login

Welcome to the i-Connect website. To use this website you must be a registered user and have a valid username and password.

**Not Registered?**

Your administering authority will register you when you are enrolled into the service.

**Received a Username?**

If you have received an email identifying your username, then you will also be sent a link which completes your registration.

If you have forgotten your Password, please call the Norfolk Pension Fund Website Queries on 01603 222132 and we will help you to log in to your i-Connect account

## i-Connect Home Page

The screenshot shows the i-Connect Home Page. At the top, there is a navigation bar with the i-Connect logo, a search bar labeled 'Your email address', and links for 'My Account', 'Contact Us', and 'Logout'. Below the navigation bar, a dropdown menu is open, showing 'Norfolk Live : EMPLOYER NAME : 00000 Monthly'. The main content area is titled 'Payroll Dashboard' and contains five tiles: 'Online Return' (Upload Payroll Data), 'Employer' (Manage employers and payrolls), 'Reports' (Generate and view reports), 'Users' (Manage users and permissions), and 'History' (View submission history). Below the dashboard is a 'Recent Activities' section with a table showing submission details. Callout boxes provide additional information: 'Click here to Return to the Home Page' points to the i-Connect logo; 'My Account' points to the 'My Account' link; 'This dropdown list displays the Employers you have access to' points to the dropdown menu; 'Online Return' explains that this section allows submitting payroll data online; 'Employer' explains that this section is managed by the Norfolk Pension Fund; 'Reports' explains that this section allows running and viewing reports; 'Users' explains that this section is managed by the Norfolk Pension Fund and provides contact information for adding or amending users; 'History' explains that this section shows the history of online return submissions; and 'Recent Activities' explains that this section shows information from the latest payroll data submissions.

**Click here to Return to the Home Page**

**My Account**  
Click here to change your Password or update your Email Address

This dropdown list displays the Employers you have access to

**Online Return**  
This section allows you to submit your Payroll Data online

**Employer**  
This section is managed by the Norfolk Pension Fund

**Reports**  
This section allows you to run and view Reports on your Payroll Data

**Users**  
This section is managed by the Norfolk Pension Fund

**History**  
This section shows the history of your Online Return submissions

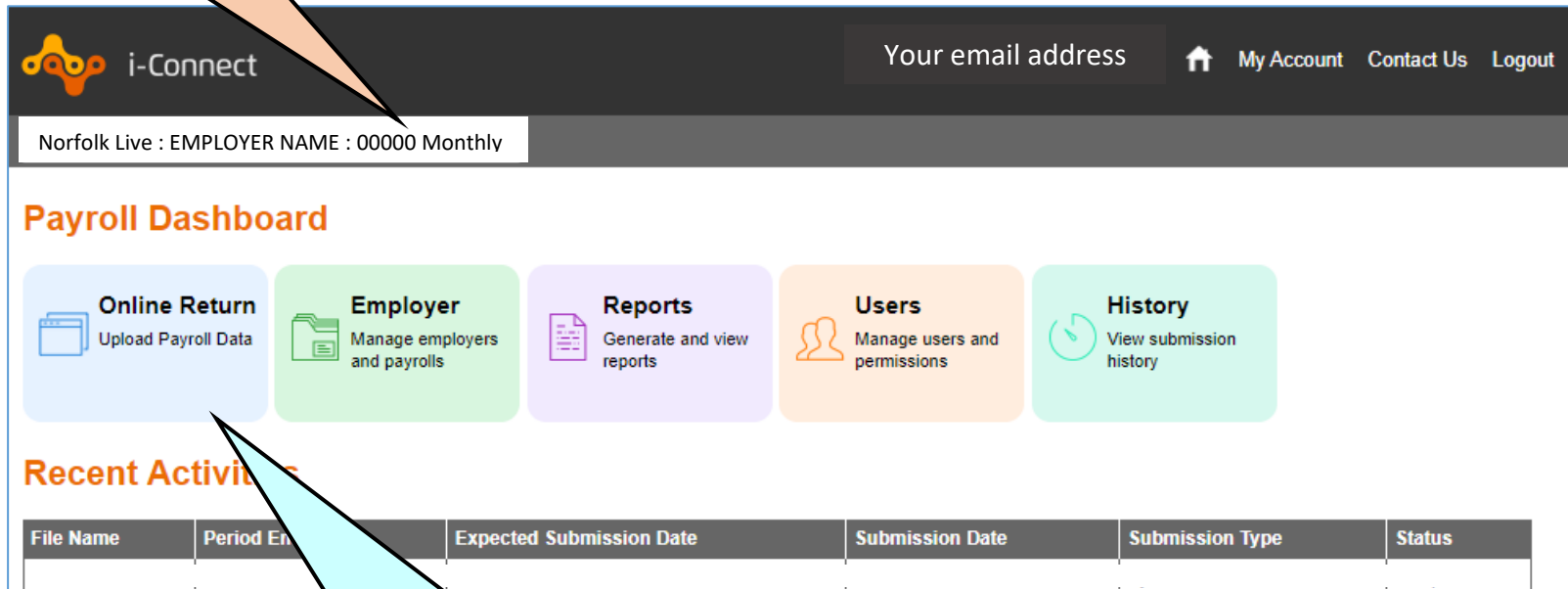
**Recent Activities**  
This section shows information from the latest Payroll Data submissions that have been uploaded

If you would like to add or amend any users, please email us at [pensions.technical@norfolk.gov.uk](mailto:pensions.technical@norfolk.gov.uk) and we will send you the SR113 i-Connect Submitter Update Form for you to complete and return

| File Name | Period End Date | Expected Submission Date | Submission Date | Submission Type |
|-----------|-----------------|--------------------------|-----------------|-----------------|
|-----------|-----------------|--------------------------|-----------------|-----------------|

## Submitting an Online Return

If you manage multiple Employers, please ensure that you have selected the correct Employer from the dropdown list before continuing



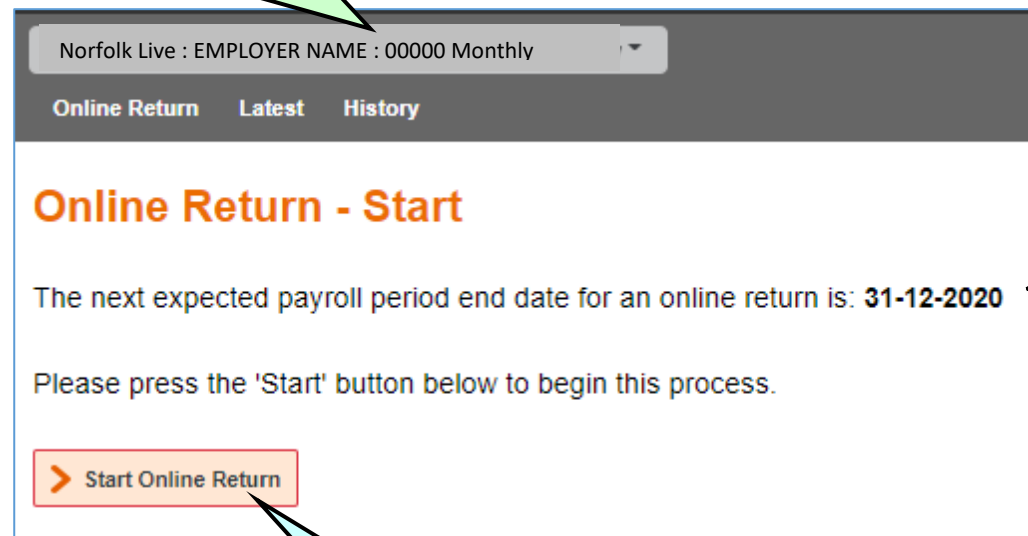
The screenshot shows the i-Connect Payroll Dashboard. At the top, there is a header with the i-Connect logo, a search bar for "Your email address", and links for "My Account", "Contact Us", and "Logout". Below the header, a breadcrumb trail reads "Norfolk Live : EMPLOYER NAME : 00000 Monthly". The main content area is titled "Payroll Dashboard" and features five colored tiles: "Online Return" (blue) with the subtext "Upload Payroll Data", "Employer" (green) with "Manage employers and payrolls", "Reports" (purple) with "Generate and view reports", "Users" (orange) with "Manage users and permissions", and "History" (teal) with "View submission history". Below these tiles is a section titled "Recent Activities" which contains a table with the following headers: "File Name", "Period End", "Expected Submission Date", "Submission Date", "Submission Type", and "Status".

| File Name | Period End | Expected Submission Date | Submission Date | Submission Type | Status |
|-----------|------------|--------------------------|-----------------|-----------------|--------|
|-----------|------------|--------------------------|-----------------|-----------------|--------|

Select the Employer you would like to submit the Online Return for from the dropdown list and click '**Online Return**'

## Submitting an Online Return (continued)

The Employer you are submitting the Online Return for is shown here. If you need to change the Employer, you will need to return to the Homepage and re-select from the dropdown list



Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Start

The next expected payroll period end date for an online return is: **31-12-2020**

Please press the 'Start' button below to begin this process.

> Start Online Return

The Payroll Period End Date that we are expecting a submission for is shown here

Click 'Start Online Return'

## Submitting an Online Return (continued) – New Starters

The Employer you are submitting the Online Return for is shown here

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return

This is a summary of each employee who will be included in the return for this pay period.

Click the 'Add New Starter' button to add any new employees.

Click the 'Remove' button to remove any new starter.

Click the 'Continue' to go to the contributions and payments.

**NB: All members should have a unique payroll reference for each post**

Payroll Period End Date 31-12-2020

Employees

> Add New Starter > Continue

| NI Number | Payroll Ref | Surname | Forenames | Gender | Date Of Birth | Status | Action |
|-----------|-------------|---------|-----------|--------|---------------|--------|--------|
|           |             |         |           |        |               | Active |        |
|           |             |         |           |        |               | Active |        |
|           |             |         |           |        |               | Active |        |
|           |             |         |           |        |               | Active |        |

> Continue

The Payroll Period End Date that we are expecting a submission for is shown here

If a member has joined the Pension Scheme within this period and isn't shown in the list, click 'Add New Starter'

The active members that we are expecting to be on the submission are shown here

## Submitting an Online Return (continued) – New Starters

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - New Employee

Please enter the details of the new employee.

Payroll Period End Date 31-12-2020

#### New Employee Details

|                     |                                               |
|---------------------|-----------------------------------------------|
| NI Number           | <input type="text"/>                          |
| Payroll Reference 2 | <input type="text"/>                          |
| Title               | <input type="text" value="Please select..."/> |
| Forenames           | <input type="text" value="EXAMPLE"/>          |
| Surname             | <input type="text" value="EXAMPLE"/>          |
| Date Of Birth       | <input type="text"/>                          |
| Gender              | <input type="text" value="Please select..."/> |
| Partnership Status  | <input type="text" value="Please select..."/> |
| Job Title           | <input type="text"/>                          |
| Date Joined Fund    | <input type="text"/>                          |
| Part Time?          | <input type="checkbox"/>                      |
| Part Time Hours     | <input type="text"/>                          |
| Whole Time Hours    | <input type="text"/>                          |

**NB: The Member Address will be added later in the Online Return process**

The End Date for the Payroll Period that the member joined the Pension Scheme is shown here

Please complete the member's:

- **NI Number** – please use a valid NI Number, we cannot accept temporary NI Numbers
- **Payroll Reference 2** - this should be the **unique payroll reference** for the post, 12 characters maximum
- **Title** – select from dropdown list
- **Forenames** - please use block capitals, 25 characters maximum
- **Surname** - please use block capitals, 25 characters maximum
- **Date of Birth** – enter in the format dd-mm-yyyy or select from the date picker
- **Gender** – select from dropdown list
- **Partnership Status** – select from dropdown list
- **Job Title** - 20 characters maximum
- **Date Joined Fund** - the day they started in the Pension Scheme within this Payroll Period
- **Part Time?** - please tick for any member that is not working full time
- **Part Time Hours** – please adjust these for term time members. Please use 0.01 for casual posts. Please leave blank for full time
- **Whole Time Hours** - what hours the part time member would work if they were full time (usually 37 hours per week). If the member is not part time, please leave blank

Click 'Save' to add the member to your Online Submission

## Submitting an Online Return (continued) – New Starters

You will receive a confirmation message that the New Starters have been set up

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return

**i** Online Return employee information successfully saved.

This is a summary of each employee who will be included in the return for this pay period.

Click the 'Add New Starter' button to add any new employee to the return.

Click the 'Remove' button to remove any new starter or leaver from the return.

Click the 'Continue' to go to the contributions and pay page.

**Employees**

Payroll Period End Date 31-12-2020

[Add New Starter](#) [Continue](#)

| NI Number | Payroll Ref | Surname | Forenames | Gender | Date Of Birth | Status      | Action                 |
|-----------|-------------|---------|-----------|--------|---------------|-------------|------------------------|
| AA123456A | 123456      | EXAMPLE | EXAMPLE   |        |               | New Starter | <a href="#">Remove</a> |
| BB123456B | 456789      | EXAMPLE | EXAMPLE   |        |               | New Starter | <a href="#">Remove</a> |
|           |             |         |           |        |               | Active      |                        |
|           |             |         |           |        |               | Active      |                        |
|           |             |         |           |        |               | Active      |                        |
|           |             |         |           |        |               | Active      |                        |

[Continue](#)

Any New Starters that you have set up will be shown here with a 'Status' of 'New Starter'.

You also have the option to remove a New Starter if needed

When you are happy that the list shows all the Active members for this Payroll Period, please click 'Continue'

## Submitting an Online Return (continued) – Current Payroll Period

For any fields with no value, please enter zeros

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Pay & Contributions - This Period

Please enter the **Pensionable Pay** for each member for this Payroll Period. This should include any **APP** (e.g. if the member was off sick or on parental leave)

Please enter the **Employee Contribution Rate** for each member for this Payroll Period

Please enter the **Employee Contributions** for each member for this Payroll Period in either the **Main Section** or the **50/50 Section** as appropriate

Please enter the **Employer Contributions** for each member for this Payroll Period.  
Do not include any SCAPC Employer Contributions.  
If you're unsure of your Employer Rate, please call us on 01603 222132

The member's NI Number and Unique Pay Reference are shown here

If you need to amend the Active Members shown, you can click 'Back' to return to the previous screen

> Back > Continue

| NI Number | Payroll Ref | Pensionable Pay | Contribution Rate | Employee Contributions |               | Employer Contributions |
|-----------|-------------|-----------------|-------------------|------------------------|---------------|------------------------|
|           |             |                 |                   | Main Section           | 50/50 Section |                        |
| AA123456A | 123456      | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
| BB123456B | 456789      | 1,000.00        | 2.75              | 0.00                   | 27.50         | 160.00                 |
|           |             | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
|           |             | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
|           |             | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
|           |             | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
| Totals    |             | 6,000.00        |                   | 275.00                 | 27.50         | 960.00                 |

> Back > Continue

When you are happy with the Totals for This Period, please click 'Continue'

The **Totals for This Period** are shown here, excluding any Additional Contributions (these will be added later in the Online Return Process if needed) and excluding any Deficit Amount (Secondary Rate)

## Submitting an Online Return (continued) – Year to Date

For any fields with no value, please enter zeros

You will receive a confirmation message that the Totals for This Period have been saved

Please enter the **Year to Date Pensionable Pay** for each member, split by **Main** and **50/50** Section if they have changed Sections during the year. This should include any **APP** (e.g. if the member was off sick or on parental leave)

Please enter the **Annual Full Time Equivalent (FTE) Pay** for each member.

The EE and ER figures you have input for each member for the current Payroll Period are shown here

Please enter the **Year to Date Employee Contributions** for each member in either the **Main Section** or the **50/50 Section** as appropriate

Please enter the **Year to Date Employer Contributions** for each member. **Do not include any SCAPC Employer Contributions.**

If you are unsure how to calculate the Annual FTE Pay, please see the FTE Pay section in our **G010 Pensionable Pay Guide**

If you need to amend the figures for the current Payroll Period, you can click '**Back**' to return to the previous screen

When you are happy with the Year to Date totals, please click '**Continue**'

The **Year to Date Totals** are shown here, **excluding any Additional Contributions** (these will be added later in the Online Return Process if needed) **and excluding any Deficit Amount (Secondary Rate)**

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Pay & Contributions - Year to Date

Online Return employee information successfully saved

This is a summary of each employee's pay and contributions

If any of the data is incorrect, please click 'Back' to return to the previous screen

Click 'Back' to return to the previous screen

Click 'Continue' to proceed to the next screen

Employee Number

Payroll Ref

EE Main

EE 50/50

ER

EE Main

EE 50/50

ER

Main Section

50/50 Section

Full Time Equivalent Pay

| This Pay Period Totals |             |         | Year to Date Totals |        |         | CARE Pay |        |              |               |                          |
|------------------------|-------------|---------|---------------------|--------|---------|----------|--------|--------------|---------------|--------------------------|
| Employee Number        | Payroll Ref | EE Main | EE 50/50            | ER     | EE Main | EE 50/50 | ER     | Main Section | 50/50 Section | Full Time Equivalent Pay |
| AA123456A              | 123456      | 55.00   | 0.00                | 160.00 | 55.00   | 0.00     | 160.00 | 1,000.00     | 0.00          | 25,000.00                |
| BB123456B              | 456789      | 0.00    | 27.50               | 160.00 | 0.00    | 27.50    | 160.00 | 0.00         | 1,000.00      | 25,000.00                |
|                        |             | 55.00   | 0.00                | 160.00 | 55.00   | 0.00     | 160.00 | 1,000.00     | 0.00          | 25,000.00                |
|                        |             | 55.00   | 0.00                | 160.00 | 55.00   | 0.00     | 160.00 | 1,000.00     | 0.00          | 25,000.00                |
|                        |             | 55.00   | 0.00                | 160.00 | 55.00   | 0.00     | 160.00 | 1,000.00     | 0.00          | 25,000.00                |
|                        |             | 55.00   | 0.00                | 160.00 | 55.00   | 0.00     | 160.00 | 1,000.00     | 0.00          | 25,000.00                |
| Totals                 |             | 275.00  | 27.50               | 960.00 | 275.00  | 27.50    | 960.00 | 5,000.00     | 1,000.00      | 150,000.00               |

Back Continue

**For more information on  
Additional Contributions  
please see our G020  
Contributions Guide**

**EE-APC (This period)**  
Please enter the pay period total for any additional pension contributions the employee is paying. Employee SCAPC contributions should be included, but do not include any employer SCAPC contributions.

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

## Online Return - Employee Additional Contributions

**SC-APC (This period)**  
Please enter the pay period total for any Shared Cost Additional Pension Contributions you pay on behalf of the employee.  
**(Do not include employee contributions share.)**

**AVCs (YTD)**  
Please enter the cumulative contributions to date total for any Additional Voluntary Contributions (including any employer Shared Amount) paid to Clerical Medical, Prudential or Utmost.

**EE-APC (YTD)**  
Please enter the cumulative to date total for any Additional Pension Contributions the employee is paying. Employee SCAPC contributions included, please **do not** include employer SCAPC contributions (NB these contributions are included in the "Add Conts/ARCs" field)

|               |           | This Pay Period |             | This Financial Tax Year |                |             |             |
|---------------|-----------|-----------------|-------------|-------------------------|----------------|-------------|-------------|
|               | Enroll    | EE-APC          | SC-APC      | AVCs                    | Add Conts/ARCs | EE-APC      | SC-APC      |
|               | 123456A   | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
|               | BB123456B | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
|               |           | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
|               |           | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
|               |           | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
|               |           | 0.00            | 0.00        | 0.00                    | 0.00           | 0.00        | 0.00        |
| <b>Totals</b> |           | <b>0.00</b>     | <b>0.00</b> | <b>0.00</b>             | <b>0.00</b>    | <b>0.00</b> | <b>0.00</b> |

**Add Conts/ARCs (YTD)**  
Please enter the cumulative amount to date for any additional pension contributions the employee is paying. Employee SCAPC contributions should be included in this field.

For any fields with no value, please enter zeros

When you are happy with the information entered, click the 'Continue' button.

**For any fields with no value, please enter zeros**

**SC-APC (This period)**  
Please enter the pay period total for any Shared Cost Additional Pension Contributions you pay on behalf of the employee.  
**(Do not include employee contributions share.)**

**AVCs (YTD)**  
Please enter the cumulative contributions to date total for any Additional Voluntary Contributions (including any employer Shared Amount) paid to Clerical Medical, Prudential or Utmost.

**EE-APC (YTD)**

Please enter the cumulative contributions to date total for any Additional Pension Contributions the employee is paying. Employee SCAPC contributions should be included, please **do not include any employer SCAPC contributions.** (NB these contributions are included in the "Add Conts/ARCs" field as well.)

**SC-APC (YTD)**  
Please enter the cumulative contributions to date total for any shared cost additional pension contributions you pay on behalf of the employee (**Do not include employee contributions share.**)

**Add Confs/ARCs (YTD)**  
Please enter the cumulative amount to date for any additional pension contributions the employee is paying. Employee SCAPC contributions should be included, but **do not include any employer SCAPC contributions.**

When you are happy with the Additional Contributions totals, please click '**Continue**'

The Additional Contribution **Totals** for this Payroll Period and Year to Date are shown here

## Submitting an Online Return (continued) – Hours Changes

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Service

Online Return employee information successfully saved.

This is a summary of each employee's whole-time / part-time status, with the effective date they became whole-time or started working those part-time hours.

If a member has changed from Part Time to Full Time, please untick 'Part Time?', input the 'Effective Date' and amend 'Part Time Hours' and 'Whole Time Hours' to blank

If a member has changed from Full Time to Part Time, please tick 'Part Time?', input the 'Effective Date' and input the 'Part Time Hours' and the 'Whole Time Hours'

If a member is Part Time and has changed their Part Time Hours, please input the 'Effective Date', the 'Part Time Hours' and the 'Whole Time Hours'

> Back > Continue

| NI Number | Payroll Ref | Part Time?                          | Effective Date | Part Time Hours | Whole Time Hours |
|-----------|-------------|-------------------------------------|----------------|-----------------|------------------|
| AA123456A | 123456      | <input checked="" type="checkbox"/> | 15-12-2020     | 0.01            | 37.00            |
| BB123456B | 456789      | <input type="checkbox"/>            | 10-12-2020     |                 |                  |
|           |             | <input checked="" type="checkbox"/> | 01-09-2018     | 29.60           | 37.00            |
|           |             | <input checked="" type="checkbox"/> | 01-09-2018     | 31.55           | 37.00            |
|           |             | <input type="checkbox"/>            | 01-09-2018     |                 |                  |
|           |             | <input checked="" type="checkbox"/> | 01-09-2018     | 34.89           | 37.00            |

> Back > Continue

When you are happy with the Hours, please click 'Continue'

**NB: Please note that hours shown here should be adjusted for term time.**

**E.g. if the member is 30.00/37.00 but only works 43 weeks term time, the hours used should be:  
 $30.00 / 52.143 \times 43 = 24.74/37.00$**

## Submitting an Online Return (continued) – Member Details Changes

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Personal Details

This is a summary of each employee's personal details.

To change any of their personal details click on the 'Edit' Button.

Click 'Back' to return to the previous page.

Click 'Continue' to continue to the next page.

**Employee Personal Details** Payroll Period End Date 31-12-2020

[Back](#) [Continue](#)

| NI Number | Payroll Ref | Title | Forenames | Surname | Date Of Birth | Gender | Partnership Status | Job Title       | Action               |
|-----------|-------------|-------|-----------|---------|---------------|--------|--------------------|-----------------|----------------------|
| AA123456A | 123456      | Dr    | EXAMPLE   | EXAMPLE | 01-01-1990    | Female | Single             | Test Job Title  | <a href="#">Edit</a> |
| BB123456B | 456789      | Mr    | EXAMPLE   | EXAMPLE | 01-01-1995    | Male   | Married            | Test Job Title2 | <a href="#">Edit</a> |
|           |             |       |           |         |               |        |                    |                 | <a href="#">Edit</a> |
|           |             |       |           |         |               |        |                    |                 | <a href="#">Edit</a> |
|           |             |       |           |         |               |        |                    |                 | <a href="#">Edit</a> |
|           |             |       |           |         |               |        |                    |                 | <a href="#">Edit</a> |

[Back](#) [Continue](#)

If any of the fields shown have changed for any member, you can click **'Edit'** to amend the data.

NB: NI Number and Payroll Ref cannot be amended.

When you are happy with the Member Details, please click **'Continue'**

## Submitting an Online Return (continued) – Member Address Changes

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Contact Details

This is a summary of each employee's contact details.

To change any of their contact details click on the 'Edit' Button.

Click 'Back' to return to the previous page.

Click 'Continue' to continue to the next page.

#### Employee Contact Details

Payroll Period End Date 31-12-2020

> Back > Continue

| NI Number | Payroll Ref | Surname | Address | Email Address | Telephone Number | Mobile Number | Action |
|-----------|-------------|---------|---------|---------------|------------------|---------------|--------|
| AA123456A | 123456      | EXAMPLE |         |               |                  |               | > Edit |
| BB123456B | 456789      | EXAMPLE |         |               |                  |               | > Edit |
|           |             |         |         |               |                  |               | > Edit |
|           |             |         |         |               |                  |               | > Edit |
|           |             |         |         |               |                  |               | > Edit |
|           |             |         |         |               |                  |               | > Edit |

> Back > Continue

If you have set up any New Starters, please click 'Edit' to input their Address

If any members have changed their Address, you can click 'Edit' to amend the data

When you are happy with the Member Addresses, please click 'Continue'

## Submitting an Online Return (continued) – Leavers and Opt Outs

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Employee Leavers & Opt Outs

This is a summary of each employee who will be included in the return for this pay period, including those who have already left.

To tell the pension team about new leaver enter the date they left employment or opted out of the fund.

For leavers, enter a reason for leaving. For opt outs, tick the 'Are they opting out?' box.

Click 'Back' to return to the previous page.

Click 'Continue' to continue to the next page.

#### Employee Leavers & Opt Outs

31-12-2020

> Back > Continue

| NI Number | Payroll Ref | Summary | Date Left Scheme     | Select Reason | Enter Reason         | Opt Out?                 |
|-----------|-------------|---------|----------------------|---------------|----------------------|--------------------------|
| AA123456A | 123456      | EXAMPLE | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |
| BB123456B | 456789      | EXAMPLE | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |
|           |             |         | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |
|           |             |         | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |
|           |             |         | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |
|           |             |         | <input type="text"/> | Reason...     | <input type="text"/> | <input type="checkbox"/> |

> Back > Continue

If any members have left, please input the 'Date Left Scheme' and the 'Reason for Leaving'.

Please leave 'Enter Reason' blank, it will be populated if you select an option under 'Select Reason'

If any members have opted out, please input the 'Date Left Scheme' and tick 'Opt Out?'.  
Reason for leaving is not needed

When you are happy with the Leaver Details (if applicable), please click 'Continue'

## Submitting an Online Return (continued)

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest History

### Online Return - Completion

You have completed all sections of the online return.

Click 'Back' to review and change any employee details.

Click 'Cancel' to cancel the return submission.

Click 'Proceed' to continue to the Latest Upload page to submit the return data to the administering authority.

the employees.

on the Latest Upload page to submit the return data to the

Payroll Period End Date 31-12-2020

> Back > Cancel > Proceed

**Please note that clicking 'Proceed' here validates the data against our records, it does not complete your submission**

All data sections have now been completed. Please click '**Proceed**' to begin the validation process

You will receive a confirmation message that the validation process has begun

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest Upload History

### Latest Upload

**i** Online Return successfully submitted.

Your payroll data is now being processed and this page will refresh shortly.

A list of detected events will be available when this stage is complete.

You must select the 'Proceed' button to update your administering authorities target system with the detected events or select 'Cancel' if you need to resubmit the data.

This page may take a few minutes to refresh depending on how many members are on the Return

## Submitting an Online Return (continued)

If there are any members under 'Omitted Payroll Members...' or 'Payroll Members in Error', you can click the 'Tolerance Failures' message to see what the warnings are.

Please contact us on 01603 222132 if you need any more information or assistance

The user who uploaded the file is displayed here

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest Upload History

### Latest Upload

Below is a summary of the latest file submission to i-Connect for the selected payroll.

You may proceed with the processing of this submission by clicking the 'Proceed' button, or alternatively cancel the submission by clicking 'Cancel'.

| File Name | Period End Date | Expected Submission Date | Submission Date | Submission Type | Status  |
|-----------|-----------------|--------------------------|-----------------|-----------------|---------|
|           |                 |                          |                 | Payroll Upload  | Pending |

#### Submission Statistics

|                                                                                           |           |                                       |         |
|-------------------------------------------------------------------------------------------|-----------|---------------------------------------|---------|
| Total Number of Payroll Members Tracked by i-Connect                                      |           | 6                                     |         |
| Omitted Payroll Members (present on a previous submission, and no leaver event processed) |           | 0                                     |         |
| Payroll Members submitted this period                                                     | 6         | Payroll Members in Error              | 0       |
| Pensionable Pay (Period)                                                                  | £6,000.00 | Employee Main Contributions (Period)  | £275.00 |
| Main CARE Pay (YTD)                                                                       | £5,000.00 | Employee Main Contributions (YTD)     | £275.00 |
| 50/50 CARE Pay (YTD)                                                                      | £1,000.00 | Employee 50/50 Contributions (Period) | £27.50  |
|                                                                                           |           | Employee 50/50 Contributions (YTD)    | £27.50  |
|                                                                                           |           | Employer Contributions (Period)       |         |
|                                                                                           |           | Employer Contributions (YTD)          |         |
|                                                                                           |           | Accepted for Processing               | 6       |
|                                                                                           |           | AVCs (YTD)                            | £0.00   |
|                                                                                           |           | Add Confs/ARCs (YTD)                  | £0.00   |
|                                                                                           |           | Shared Cost APCs (Period)             | £0.00   |
|                                                                                           |           | Shared Cost APCs (YTD)                | £0.00   |
|                                                                                           |           | Employee APCs (Period)                | £0.00   |
|                                                                                           |           | Employee APCs (YTD)                   | £0.00   |

Submitted By User USERNAME

The file information is displayed here with a Status of 'Pending'

The submission totals are displayed here.

**\*\*Please ensure that the current Period totals on your submission match the current month totals on your SR71 Contribution Remittance. Any Deficit/Secondary Amount should be included on the SR71, but IS NOT included in the i-Connect submission\*\***

**\*\*Please ensure your SR71 Contribution Remittance is emailed to Sam Ayling before payment is made.\*\***

## Submitting an Online Return (continued)

This displays the updates within the current Payroll Period that will be processed:

- **New Starters**  
Indicates New Starters in this Payroll Period
- **Opt Ins (N/A)**
- **Service**  
Indicates Hours Changes
- **Salary**  
Indicates FTE Salary Changes
- **Contributions**
- **Additional Contributions**
- **CARE Pay**
- **Service Break (N/A)**
- **Member Details Update**
- **Member Address Update**
- **Works Address Update (N/A)**
- **Opt Out**  
Opt Out checkbox must be ticked
- **Leaver**  
Date of Leaving and Reason for Leaving must be completed

You can click on the numbers in the 'Pending' column to review which members are going to be updated

| Events                   | Total | Pending | Submitted | Completed | Failed | Errors | Suppressed | Progress             |
|--------------------------|-------|---------|-----------|-----------|--------|--------|------------|----------------------|
| New Starter              | 2     | 2       | 0         | 0         | 0      | 0      | 0          | <input type="text"/> |
| Opt In                   | 0     | 0       | 0         | 0         | 0      | 0      | 0          |                      |
| Service                  | 0     | 0       | 0         | 0         | 0      | 0      | 0          |                      |
| Salary                   | 6     | 6       | 0         | 0         | 0      | 0      | 0          | <input type="text"/> |
| Contributions            | 6     | 6       | 0         | 0         | 0      | 0      | 0          | <input type="text"/> |
| Additional Contributions | 0     | 0       |           |           |        |        |            |                      |
| CARE Pay                 | 6     | 6       |           |           |        |        |            | <input type="text"/> |
| Service Break            | 0     | 0       |           |           |        |        |            |                      |
| Member Details Update    | 2     | 2       |           |           |        |        |            | <input type="text"/> |
| Member Address Update    | 2     | 2       |           |           |        |        |            | <input type="text"/> |
| Works Address Update     | 0     | 0       |           |           |        |        |            |                      |
| Opt Out                  | 0     | 0       |           |           |        |        |            |                      |
| Leaver                   | 0     | 0       | 0         | 0         | 0      | 0      | 0          |                      |

If there are any 'Errors' or 'Failures' the Proceed button may not be clickable. If you have checked and are happy with the data, please email us at [pensions.technical@norfolk.gov.uk](mailto:pensions.technical@norfolk.gov.uk) and we will release the submission.

If you are happy with the updates that are going to be made, click 'Proceed'. **This will complete your submission.**

If you click 'Cancel' you will return to the previous page

The status bars show if the updates have been completed

## Submitting an Online Return (continued)

You will receive a confirmation message that the file is being processed

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest Upload History

### Latest Upload

**i** Submission processing started.

Below is a summary of the latest file submission to i-Connect for the selected payroll.

| File Name | Period End Date | Expected Submission Date | Submission Date | Submission Type | Status    |
|-----------|-----------------|--------------------------|-----------------|-----------------|-----------|
|           |                 |                          |                 | Payroll Upload  | Submitted |

This page may take a few minutes to refresh depending on how many members are on the Return

The file information is displayed here with a Status of 'Submitted'

Norfolk Live : EMPLOYER NAME : 00000 Monthly

Online Return Latest Upload History

### Latest Upload

Below is a summary of the latest file submission to i-Connect for the selected payroll.

| File Name | Period End Date | Expected Submission Date | Submission Date | Submission Type | Status   |
|-----------|-----------------|--------------------------|-----------------|-----------------|----------|
|           |                 |                          |                 | Payroll Upload  | Complete |

When the file has been processed, the file information is displayed here with a Status of 'Complete'

The submission is now complete.

If you return to the 'Online Return' screen, it will have moved on to the next Payroll Period End Date

| Events                   | Total | Pending | Submitted | Completed | Failures | Errors | Suppressed | Progress    |
|--------------------------|-------|---------|-----------|-----------|----------|--------|------------|-------------|
| New Starter              | 1     | 0       | 0         | 1         | 0        | 0      | 0          | <div></div> |
| Opt In                   | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Service                  | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Salary                   | 6     | 0       | 0         | 6         | 0        | 0      | 0          | <div></div> |
| Contributions            | 6     | 0       | 0         | 6         | 0        | 0      | 0          | <div></div> |
| Additional Contributions | 1     | 0       | 0         | 1         | 0        | 0      | 0          | <div></div> |
| CARE Pay                 | 6     | 0       | 0         | 6         | 0        | 0      | 0          | <div></div> |
| Service Break            | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Member Details Update    | 1     | 0       | 0         | 1         | 0        | 0      | 0          | <div></div> |
| Member Address Update    | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Works Address Update     | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Opt Out                  | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |
| Leaver                   | 0     | 0       | 0         | 0         | 0        | 0      | 0          | <div></div> |

The status bars are now green to show the updates have been completed.

If any of the status bars are red, please contact us on 01603 222132

## Making Adjustments for Errors in Submissions

It is important that before you press the **proceed** button that you reconcile the amounts shown on the screen with the amounts you are paying over to the pension fund on your SR71 form for the month. If there are any differences you will need to either go back and revise your i-Connect submission or amend your SR71 form before sending it to us.

| Submission Statistics                                                                     |             |                                       |            |                           |       |
|-------------------------------------------------------------------------------------------|-------------|---------------------------------------|------------|---------------------------|-------|
| Total Number of Payroll Members Tracked by i-Connect                                      |             |                                       |            |                           | 16    |
| Omitted Payroll Members (present on a previous submission, and no leaver event processed) |             |                                       |            |                           | 0     |
| Payroll Members submitted this period                                                     | 16          | Payroll Members in Error              | 0          | Accepted for Processing   | 16    |
| Pensionable Pay (Period)                                                                  | £26,465.73  | Employee Main Contributions (Period)  | £1,641.87  | AVCs (YTD)                | £0.00 |
| Main CARE Pay (YTD)                                                                       | £167,866.44 | Employee Main Contributions (YTD)     | £10,605.72 | Add Confs/ARCs (YTD)      | £0.00 |
| 50/50 CARE Pay (YTD)                                                                      | £0.00       | Employee 50/50 Contributions (Period) | £0.00      | Shared Cost APCs (Period) | £0.00 |
|                                                                                           |             | Employee 50/50 Contributions (YTD)    | £0.00      | Shared Cost APCs (YTD)    | £0.00 |
|                                                                                           |             | Employer Contributions (Period)       | £4,102.20  | Employee APCs (Period)    | £0.00 |
|                                                                                           |             | Employer Contributions (YTD)          | £26,019.33 | Employee APCs (YTD)       | £0.00 |

| EMPLOYEES (Ees)                                                                                                               |                       |                                                      |           | EMPLOYERS (Ers)                    |               |                                                |           |
|-------------------------------------------------------------------------------------------------------------------------------|-----------------------|------------------------------------------------------|-----------|------------------------------------|---------------|------------------------------------------------|-----------|
| Pensionable Pay<br>(The total of MAIN Section and 50/50 Section INCLUDING any assumed pay)<br>NOT JUST ACTUAL PENSIONABLE PAY | Normal Basic<br>(Ees) | Additional Contributions<br>(Including APC)<br>(Ees) | Tot Ees   | Normal<br>(Primary Rate)<br>(ER's) | APC<br>(ER's) | Arrears relating to previous year(s)<br>(ER's) | Total Ers |
| 35,537.79                                                                                                                     | 2,396.37              |                                                      | 2,396.37  | 5,508.33                           |               |                                                | 5,508.33  |
| 26,465.73                                                                                                                     | 1,641.87              |                                                      | 1,641.87  | 4,102.20                           |               |                                                | 4,102.20  |
| 26,465.73                                                                                                                     | 1,641.87              |                                                      | 1,641.87  | 4,102.20                           |               |                                                | 4,102.20  |
| 26,465.73                                                                                                                     | 1,641.87              |                                                      | 1,641.87  | 4,102.20                           |               |                                                | 4,102.20  |
| 26,465.73                                                                                                                     | 1,641.87              |                                                      | 1,641.87  | 4,102.20                           |               |                                                | 4,102.20  |
| 26,465.73                                                                                                                     | 1,641.87              |                                                      | 1,641.87  | 4,102.20                           |               |                                                | 4,102.20  |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
|                                                                                                                               |                       |                                                      | 0.00      |                                    |               |                                                | 0.00      |
| 167,866.44                                                                                                                    | 10,605.72             | 0.00                                                 | 10,605.72 | 26,019.33                          | 0.00          | 0.00                                           | 26,019.33 |

**The i-Connect submission and SR71 should show exactly the same figures.**

## Making Adjustments for Errors in Submissions (continued)

You should submit the figures that you have paid in your payroll. If you make an adjustment to pay in a particular month you must include that adjustment too (even if it relates to a previous financial year). This is so that your payroll figures match exactly with the figures you submit to us in i-Connect and on the SR71 form.

***It is also important that you don't override the "Year to Date" figures as they are maintained by the i-Connect system.***

Online Returns - YTD Figures screenshot:

| Employee Pay & Contributions - Year to Date |             |                                               |          |        |                     |          |        |              |                          |
|---------------------------------------------|-------------|-----------------------------------------------|----------|--------|---------------------|----------|--------|--------------|--------------------------|
|                                             |             | Payroll Period End Date 31-12-2020            |          |        |                     |          |        |              |                          |
|                                             |             | <a href="#">Back</a> <a href="#">Continue</a> |          |        |                     |          |        |              |                          |
|                                             |             | This Pay Period Totals                        |          |        | Year to Date Totals |          |        | CARE Pay     |                          |
| NI Number                                   | Payroll Ref | EE Main                                       | EE 50/50 | ER     | EE Main             | EE 50/50 | ER     | Main Section | Full Time Equivalent Pay |
| AA123456A                                   | 123456      | 55.00                                         | 0.00     | 160.00 | 55.00               | 0.00     | 160.00 | 1,000.00     | 25,000.00                |
| BB123456B                                   | 456789      | 0.00                                          | 27.50    | 160.00 | 0.00                | 27.50    | 160.00 | 0.00         | 25,000.00                |

If you provide different amounts on the i-Connect submission to the SR71 and payment, then this will mean that we can't be confident in your figures. That will entail further work for the pension fund teams as well as you and could result in additional administration charge to you.

### Making Adjustments for Errors in Submissions (continued)

However, we do appreciate that sometimes things do go wrong, and you may need to make an adjustment.

You can't go back and make the submission again, but you do need to tell us.

If you have already made your last submission for the financial year that you wish to make an adjustment to, please let us have the full details and we will make the adjustments for you.

If you are still making submissions for the same financial year, then you can make the adjustment in your next submission.

**Online Returns – Current Period Figures screenshot:**

Employee Pay & Contributions - This Period

Payroll Period End Date 31-12-2020

Back

Continue

|           |             |                 |                   | Employee Contributions |               |                        |
|-----------|-------------|-----------------|-------------------|------------------------|---------------|------------------------|
| NI Number | Payroll Ref | Pensionable Pay | Contribution Rate | Main Section           | 50/50 Section | Employer Contributions |
| AA123456A | 123456      | 1,000.00        | 5.50              | 55.00                  | 0.00          | 160.00                 |
| BB123456B | 456789      | 1,000.00        | 2.75              | 0.00                   | 27.50         | 160.00                 |

For example, if you had understated the amount of employee contributions by £10 in a previous month of the year, simply add £10 to the amount you are otherwise submitting for the current month.

Similarly, if you had overstated the amount of employers' contributions by £6 in one month and £8 in another month, simply deduct £14 to the amount you are otherwise submitting for the current month.

Or, if you had overstated the amount of pensionable pay in one month by £200 and understated it by £50 in another month, simply deduct £150 to the amount you are otherwise submitting for the current month.

Just remember if you need to make adjustments to i-Connect submissions for a previous financial year you will need to contact us and provide details of what needs changing.

## Reporting

### Payroll Dashboard



**Online Return**  
Upload Payroll Data



**Employer**  
Manage employers and payrolls



**Reports**  
Generate and view reports



**Users**  
Manage users and permissions



**History**  
View submission history

Click '**Reports**' to see the Auto-Generated Summary Reports for each submission. These are in PDF format and can be downloaded if needed. They will be available on i-Connect for approximately one month after the Online Return submission

From the Homepage, click '**History**' to see the history of Online Return submissions to i-Connect.

In the list, click the orange arrow on the right to view the Submission Statistics and the Events that were processed

| Upload File Latest Upload History                                     |                 |                          |                     |                 |          |   |
|-----------------------------------------------------------------------|-----------------|--------------------------|---------------------|-----------------|----------|---|
| History                                                               |                 |                          |                     |                 |          |   |
| This page shows the history of file uploads for the selected payroll. |                 |                          |                     |                 |          |   |
| File Name                                                             | Period End Date | Expected Submission Date | Submission Date     | Submission Type | Status   |   |
|                                                                       | 31-01-2021      | 31-01-2021               | 19-01-2021 13:04:37 | Synchronisation | Complete | ▼ |
|                                                                       | 31-01-2021      | 31-01-2021               | 19-01-2021 12:22:21 | Member Matching | Complete | ▼ |

| Generate Report View Reports                                                                                                                                                                                                                                                                                  |         |                     |                 |             |           |                                 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|---------------------|-----------------|-------------|-----------|---------------------------------|
| View Reports                                                                                                                                                                                                                                                                                                  |         |                     |                 |             |           |                                 |
| Below are the generated reports which are currently available for download. Click on the 'Download Report' button for a report to download it. If you wish to save the report and specify the file name, right-click on the 'Download Report' button and select 'Save Link As...'.<br>Auto Generated Reports: |         |                     |                 |             |           |                                 |
| Report Template                                                                                                                                                                                                                                                                                               | Payroll | Date Generated      | Generated By    | Expiry Date | Status    |                                 |
| Submission Contributions Summary Report                                                                                                                                                                                                                                                                       |         | 26-01-2021 09:21:08 | testingpurposes | 23-02-2021  | Available | <a href="#">Download Report</a> |

## Reporting (continued)

There are two further reports that can be run by clicking '**Generate Report**'

**Generate Report** View Reports

### View Reports

Below are the generated reports which are currently available. You can click on a report to view its parameters, or you can click on the 'Generate Report' button to generate the report. If you wish to save the report and specify the file name, right-click on the report name.

Both types of report will ask for the same parameters:  
**Payroll Period From**  
**Payroll Period To**  
Which **Employer(s)** you want to show the data for

### Generate Report

The reports you can generate are listed below. Click on the report you would like to generate.

1. Submission Transaction Report
2. Contributions Reconciliation Report

#### Submission Transaction Report

This report shows the Events that were processed for each month in the selection period (e.g. number of new starters, number of leavers, etc)

#### Report Parameters

The report you have selected requires parameters to define the output of the report.

Report Name **Submission Transaction Report**

Payroll Period From

Payroll Period To

Employer **Nothing selected**

**> Generate Report**

Select All Deselect All

EMPLOYER 1

#### Report Parameters

The report you have selected requires parameters to define the output of the report.

Report Name **Contributions Reconciliation Report**

Payroll Period From

Payroll Period To

Employer **Nothing selected**

**> Generate Report**

Select All Deselect All

EMPLOYER 1

#### Contributions Reconciliation Report

This report can be used to reconcile your monthly SR71 Contribution Remittance and your payments to NPF.

It shows the amounts submitted for each month in the selection period, and the YTD cumulative totals

When you click '**Generate Report**', a csv file containing the data will be created, which you can then download

## Document Upload

The following template forms have been designed to be completed digitally on a PC/tablet and uploaded to i-Connect. You can find all template forms on our website [www.norfolkpensionfund.org](http://www.norfolkpensionfund.org). Look under “Employers” for the employer forms.

**You can upload two types of documents to i-Connect:**

### Active Member Documents

- Retirement Estimate Request (MISC89)
- Notification of Unpaid Leave (SR47B)
- Member Opt Out Form (SR97)
- Pension Option Reduced Pay (SR90)
- Option to Pay Contributions for Unpaid Leave (SR108)
- Member Death Grant Form (SR81)
- Membership Form (SR95)
- Member Non-LGPS Transfer Request (SR96)
- General Enquiry/Other (use this to upload other documents e.g. birth certificates, passports etc.)

### Leaver Documents

- Leaver Form (L45)
- Early Retirement Authorisation (R16)
- Early Notification of Retirement (R25)
- Ill Health Certs (R18 and/or R45)
- Employer Notification of Opt Out (SR88)

## Member Documents Upload

Identify the member by entering the NI Number in the **Member Search** box and clicking the '**Member Search**' button.

i-Connect merv.mccune@norfolk.gov.uk My Account Contact Us Logout

Enter Full NI Number ... **Member Search**

The search results will display the latest payroll submissions for the relevant member.

**Member Search**

1 result(s) for AB123456C

| Employer Name    | Payroll Name      | Payroll Reference | Period End Date |
|------------------|-------------------|-------------------|-----------------|
| Norfolk Employer | Norfolk - MONTHLY | 123456            | 30 October 2021 |

**Upload Active Member Documents** **Upload Leaver Documents** **View Document History**

Select the corresponding payroll reference and then choose either the '**Upload an Active Member Documents**' or '**Upload Leaver Documents**' button, depending on the reason for the submission (i.e. what document(s) you are uploading – see above list).

## Active Member Documents

A pop-up window will appear to guide you through document upload process:

**Member Search**

1 result(s) for [REDACTED]

Employer N

Age UK

> Upload A

### Upload Active Member Documents

You are about to start uploading active documents for member AB123456C linked to Payroll Reference [123456]

Step 1- Select Reason

Reason for Active

- Please Select Reason For Active...
- Please Select Reason For Active...
- Additional Pension Contributions**
- Benefits Projection Request
- General Query

> Upload

Select the **Reason** (i.e. what document(s) you are uploading – see above) for upload from the selector box, i-Connect will then prompt you to upload the relevant document(s):

## Upload Active Member Documents

You are about to start uploading active documents for member AB123456C linked to Payroll Reference [123456]

### Step 1- Select Reason

Reason for Active

Additional Pension Contributions



Choose relevant file

### Step 2- Add Documents

All documents must be attached to before you can proceed

Additional Pension Contribution  
Form 001

> Choose File

i-Connect DocTx.docx

> Upload

Click '**Upload**' to submit the document(s). A message will appear on the Member Search page with a status update showing "PROCESSING".

## Leaver Documents

### Member Search

1 result(s) for AB123456C

| Employer Name    | Payroll Name      | Payroll Reference |
|------------------|-------------------|-------------------|
| Norfolk Employer | Norfolk - MONTHLY | 123456            |

> Upload Active Member Documents

> Upload Leaver Documents

> View Document History

#### Leaver Documents

Select the '**Upload Leaver Documents**' button to provide documents for a leaver. Select a **Reason for Leaver** (i.e. what document(s) you are uploading – see above) from the selector box. You will then be prompted to enter a **Date of Leaving** and to upload the relevant documents required:

## Upload Leaver Documents

You are about to start uploading active documents for member AB123456C linked to Payroll Reference [123456]

### Step 1- Select Reason

Reason for Leaver

Ill Health Certificates - Form R1

Select "Reason for Leaver" (i.e. what document(s) you are uploading – see above) for upload from the selector box, i-Connect will then prompt you to upload the relevant document(s):

### Step 2- Select Date Member Is Leaving

*This is the the last date the member is employed.*  
*Date of Leaving is mandatory and cannot be more than one year in the past or more than three months in the future*

Date Of Leaving

This field is Mandatory

Input "Date of Leaving"

### Step 3- Add Documents

*All documents must be attached to before you can proceed*

Ill Health Certificates (R18 and/or R45)

Choose Files

Your chosen document(s) to upload are shown here.

Upload

Click 'Upload' to submit the document(s). A message will appear on the Member Search page with a status update showing "PROCESSING".

## Document History

To check on the progress of the submission, click on the '**View Document History**' button within the relevant Member search result to bring up a list of all submission attempts for that Member/Payroll.

### View Document History

Complete document upload history for member AB123456C linked to Payroll Reference [123456]

| Document                             | Reason for Upload | Uploaded By | Date Uploaded | Document Status |
|--------------------------------------|-------------------|-------------|---------------|-----------------|
| Retirement Estimate Request (MISC89) | Estimate Request  | GINNY852    | 2021-05-05    | PROCESSING      |
| Membership Form (SR95)               | Membership Form   | GINNY852    | 2021-04-27    | PROCESSING      |

Once a submission is complete, the Document Status will change to 'COMPLETE' which confirms the document has been uploaded to the Pension Fund successfully.

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## Other Actions to carry on doing

Now that your Payroll Data is being submitted regularly through i-Connect, you **no longer need to complete the following forms:**

- Bulk/Individual Starters (SR46 Forms)
- Bulk/Individual Hours Changes (SR47C Forms)
- Bulk/Individual Name Changes
- Bulk/Individual Address Changes
- Individual Section Changes (SR106 Forms)
- Individual Pay Paid After Leaving (L1 Forms)

**Please continue to complete and email your SR71 Monthly Contribution Remittance spreadsheet to Sam Ayling ([sam.ayling@norfolk.gov.uk](mailto:sam.ayling@norfolk.gov.uk)) each month before you make payment to the Pension Fund**

Please submit the following **Interactive Forms** via i-Connect:

- L45 Termination Forms
- MISC89 Estimate of Benefits
- R16 Retirement Discretions
- R25 Advance Warning of Retirements
- SR47B Notification of Unpaid Leave

Please submit the following **Interactive Forms** via i-Connect:

- Opt Outs - SR88 Employer Notification of Opt Out
- Opt Outs - SR97 Member Opt Out Form
- Ill Health - R18 I/H Retirement Certificate
- Ill Health - R18(DB) I/H Retirement Certificate (Deferred)
- Ill Health - R18(IH3) I/H 3<sup>rd</sup> Tier Review Certificate
- Ill Health - R18(Review) I/H 3<sup>rd</sup> Tier Review
- Ill Health - R45 I/H Retirement Employer Decision
- Ill Health - R46 I/H 3<sup>rd</sup> Tier Review Employer Decision
- Ill Health - R53 I/H Certificate and Employer Decision (Deferred)
- SR90 Pension Option Reduced Pay
- SR108 Option to Pay Conts for Unpaid Leave

Please continue to request that New Starters complete and return the following **Interactive Forms**:

- New Starters - SR81 Death Grant Form
- New Starters - SR95 Membership Form
- New Starters - SR96 Non LGPS Benefits Transfer Request

**All our forms can be found on our website: [norfolkpensionfund.org](https://norfolkpensionfund.org)**

**Postal Address Only:**

Norfolk Pension Fund  
County Hall  
Martineau Lane  
NORWICH  
NR1 2DH

**Pensions Administration**

**Enquiries: 01603 495923**

**Email: [pensions@norfolk.gov.uk](mailto:pensions@norfolk.gov.uk)**

For questions about SR71 and payments please contact:

**Sam Ayling**

**Enquiries: 01603 222906**

**Email: [sam.ayling@norfolk.gov.uk](mailto:sam.ayling@norfolk.gov.uk)**

For questions about i-Connect please contact:

**Pensions Technical Team**

**Enquiries: 01603 222132**

**Email: [pensions.technical@norfolk.gov.uk](mailto:pensions.technical@norfolk.gov.uk)**

**[www.norfolkpensionfund.org](http://www.norfolkpensionfund.org)**