

SPECIAL EMPLOYER BRIEF

Pension Administration Software Transition (PAST) Project

Employer Newsletter

You said – we did!

Employer Self-Service (ESS) transition date deferred to 24/07/2023

As you are aware, the Fund and its partner Equiniti have been working together to bring our employers, our members, and the Fund a new pensions administration software system that includes new self-service portals for employers and members.

We value your input into the PAST project and have been actively gathering your feedback and comments in relation to the project. We've listened to your views and comments and, as such, we have taken the decision to defer the roll-out of ESS. **Our new go-live date will be Monday 24th July 2023**; this move will allow you to attend more training prior to the change; give you the opportunity to review your current practices and align them to ESS's requirements; and give you more time to carry out the essential data-cleansing exercises that will be required to ensure that only accurate member data is migrated.



EQUINITI



Training

During the last few months, we have introduced the ESS portal to more than 200 people as part of our comprehensive training programme.

The extension to the transition date means that we can reach even more employers and payroll providers prior to go-live. We strongly encourage every current Employer Hub user to attend at least one webinar or face-to-face session for each topic. The full suite of training is accessible [here](#); please note that each presentation of a specific topic is a repeat, so you will only need to attend one session for each area, but you are more than welcome to attend multiple presentations of the same topic if you wish.

Note: due to the dynamic nature of product development, it may be necessary to reschedule some sessions if the test system becomes unavailable due to enhancements being applied. If it becomes necessary to do so, your booking will automatically be transferred to the new date, and you will be sent an email to notify you of the change.

Data submission deadlines

What	By when?	
Now <ul style="list-style-type: none"> Respond to all <i>outstanding</i> data queries: <ul style="list-style-type: none"> Monthly data feedback S15 queries McCloud data queries Notify us of any significant membership changes Check your current Hub users 	No later than: 31/05/2023	
Before Go-Live	<ul style="list-style-type: none"> Log into Employer Hub to ensure your access remains active Check your active member lists Submit all monthly submission files up to May 2023 	No later than: 19/06/2023 IMPORTANT: Access to the monthly submission process in Hub will be switched off from 20/06/2023
	<ul style="list-style-type: none"> Submit early leaver refund/deferment notifications (for members to be issued Disclosure regulations by 23/06/2023) 	No later than: 23/06/2023
	<ul style="list-style-type: none"> Submit member S10 notifications 	No later than: 19/06/2023 IMPORTANT: Access to the member changes process in Hub will be switched off from 20/06/2023
	<ul style="list-style-type: none"> Submit retirement notifications quotes to be issued by 14/07/2023 	No later than: 23/06/2023
	<ul style="list-style-type: none"> Respond to S15 queries raised between 01/06/2023 and 16/06/2023 within 10-day KPI 	No later than: 30/06/2023
	<ul style="list-style-type: none"> Pay contributions to June 2023 Complete online remittance form 	No later than: 19/07/2023
Close down <ul style="list-style-type: none"> Access to current WMPF administration system removed 	14/07/2023	

*WMPF can accept retirement paperwork earlier than current three weeks' timescale if the pay figures are accurate (i.e., no contractual overtime requiring revised pay figures and recalculation).

Data cleansing requirements

To ensure that the member and employer data that is migrated to the new system (Compendia Touch) is accurate, we are asking employers to ensure that the following exercises are completed over the next few months.

If you outsource your pensions administration to a third-party, please ensure that they are aware of the requirements:

- | | |
|---|---|
| <input type="checkbox"/> Log into Employer Hub at least once in the three months preceding go-live to keep your account active | <input type="checkbox"/> Submit leaver notifications for anyone that should no longer be active |
| <input type="checkbox"/> If you are a Superuser, run a 'Managed User' SSRS report and notify us of any new users or revocations that are required | <input type="checkbox"/> Ensure that you have noted pension reference numbers for each membership record and updated your records |
| <input type="checkbox"/> Run an 'Active Member List' and; | <input type="checkbox"/> Ensure that members with concurrent employments have a record for each employment, and a unique pay reference number for each employment |
| <input type="checkbox"/> Check your membership profile is correct | <input type="checkbox"/> Ensure that your members' earnings and contributions data are up to date |
| <input type="checkbox"/> Notify the Fund of any joiners that are required | |

McCloud

Thank you to everyone that engaged with the 2014–2021 data collection exercise: we know that you are now keen to submit your bulk member changes (hours and service breaks) from 2021 onwards.

As we previously confirmed, this data will be submitted to us in a second bulk data file; however, the timeframe of the bulk data collection and then subsequent submission of ongoing data through the Standard Interface is as yet unconfirmed and is a process that we are currently developing with EQ. For now, please continue to collate hours changes and service break data (changes only for all members) from 01/04/2021 up to go live on Compendia in the file layout that is available on our [website](#). Please note that this is the same layout that was used for the 2014–2021 data collection.

Please be aware that the Scheme Advisory Board (SAB) have recently issued [guidance](#) to Administering Authorities on how to handle member data where

there have been issues with the quality of data provided by employers, or where employers have failed to comply with the data collection requirements. Funds will be required to estimate members' hours and service where data is incomplete which may have consequences for employers that have chosen not to supply the requisite data in the format requested.

The Department for Levelling Up, Housing and Communities (DLUHC) recently issued its response to the consultation on the proposed changes to the statutory underpin, which is available to view here: [Amendments to the Local Government Pension Scheme statutory underpin: government response](#). Additionally, DLUHC have created a leaflet designed to inform members about the McCloud remedy and its possible consequences for their pension. If you would like to share it with your members it is accessible here: [The McCloud judgment and your LGPS pension](#).

Interfaces – data submission

If you have already attended one of our 'General Navigation' training sessions, you will be aware that we are moving from the requirement to submit individual S4 Leaver Notifications and S10 Member Changes Notifications to a bulk interface file method. In practice, this means that you will be able to submit notifications for multiple members on either the Exit Interface (for leavers) or the Standard Interface (for member changes) as illustrated in the table below.

Interface type	Data type
Monthly Submission Interface (file layout remains the same)	<ul style="list-style-type: none">• Monthly earnings and contribution data• New joiners• Immediate opt-outs (members opting out withing three months and receiving a refund via payroll)
Standard Interface (new file layout to be provided)	<ul style="list-style-type: none">• Hours changes (ALL members)• Service breaks (ALL members)• Changes in personal details (e.g., name)• Change of address• Change in scheme section (e.g., from Main Section to 50/50 Section)
Exit Interface (new file layout to be provided)	<ul style="list-style-type: none">• Opt-outs after three months• Early leavers• All retirements (including ill health)• Death in service

Monthly submissions

Pre-transition:

To ensure that data is processed in time for its migration to Compendia and ESS, we are asking employers to make sure your April and May 2023 monthly data files are submitted via the Hub as promptly as possible. The deadlines for these two submissions remain the 19th of the following month, respectively. Please be aware that if your April and May submissions are not completed by 19/06/2023 you will be unable to submit the June 2023 file on our new system.

Continued overleaf

Monthly submissions (continued)

Post-transition:

To accommodate the transition, we are giving employers a little more time to submit your June 2023 files: we are asking that both your June and July 2023 monthly data files are submitted in ESS no later than 19th August 2023. However, you will still be required to pay your June contributions to the Fund by 19th July, and we are asking you to complete this short [online remittance advice](#) (for June only) to allow our Finance Team to allocate your payments.

Following transition to ESS on 24th July 2023, we are asking employers to participate in a phased submission of your June monthly data files from Wednesday 26th July onwards. This will ensure that the Fund can provide appropriate levels of support in a measured way to new ESS users. Please complete this [form](#) to rank your preferred slots for monthly data file submission no later than Monday 15th May 2023. The preferences will be reviewed, and employers will be given a slot in one of their top three preferred slots, subject to popularity and availability.

Essential information:

Whilst the current monthly submission file layout will remain, there are some key process changes that you need to be aware of:

To prevent the Fund having to contact employers with queries after your files have been submitted, more validations will be run before you submit your file to the Fund, giving you the opportunity to investigate and rectify issues in real-time.

Your data file must include the 8-digit pension reference numbers for ALL members: 'o' will no longer be acceptable. If the member is a new joiner to the scheme the pension reference number field must be left blank.

Your data file must include a unique payroll number for each post/pension record per member.

Most validations are run against members' records during the process, and not after submission to the Fund.

Your monthly data file, which must still be submitted as a .CSV file, will require the header row to be included.

Error resolution will be done by downloading, amending, and re-uploading a resubmission file. Your remittance advice will not be produced, and the contribution data will not be posted to any of your member or employer records, unless all errors have been cleared.

Hours changes and service breaks for protected members will no longer be submitted via the monthly submission file, instead, these will be notified to us for ALL members from 24/07/2023 via the new bulk Standard Interface file.

You will not be able to submit your next file until the previous file has been submitted. For example, if you have not uploaded, validated, corrected errors, and posted the remittance advice for your June 2023 file, you will not be able to upload your July 2023 file.

Standard Interface

The Standard Interface replaces the current individual S10 notifications and bulk member changes file, and is the method through which you will notify the Fund of any changes affecting members' records:

- Hours changes (ALL members)
- Service breaks (ALL members)
- Changes in personal details (e.g., name)
- Change of address
- Change in scheme section (e.g., from Main Section to 50/50 Section)

As with the monthly submission process in ESS, a number of validations will be run against the members' data prior to submission. You will have the option to either resubmit your data file if you feel that there are too many errors, or you can correct errors by exception using a resubmission file. Please note that all errors will need to be resolved before any data is passed through to the Fund.

Please continue to submit your member changes via S10 notifications in Employer Hub until the date advised in the table above.

Exit Interface

The Exit Interface replaces the current individual S4 leaver notifications, and is the method through which you will notify the Fund of the following leavers:

- Opt-outs after three months
- Refunds
- Deferments
- Ill-health retirement
- Redundancy
- Normal age retirement
- Early retirement
- Death in service

As with the processes described above, a number of validations will be run against the members' data prior to submission. You will have the option to either resubmit your data file if you feel that there are too many errors, or you can correct errors by exception using a resubmission file.

Please continue to submit your leaver notifications in Employer Hub until the dates advised in the table above.

Please note that for all interfaces, all errors will need to be resolved before any data is passed through to the Fund.

The Fund is committed to fully supporting employers and payroll providers in the transition to the new pension administration software and is offering a comprehensive suite of training prior to transition (please see our collection [here](#)), and post-transition as part of our usual coaching activities. We will also be producing guidance documents and videos for ESS users, so please bookmark our [PAST news page](#) to be the first to know when new training or guidance becomes available.

Contact Us

[McCloud updates: West Midlands Pension Fund - Regulatory changes \(including McCloud\) \(wmpfonline.com\)](#)

[PAST updates: West Midlands Pension Fund - Regulatory changes \(including McCloud\) \(wmpfonline.com\)](#)

[PAST queries: WMPFEmployerSystemSupport@wolverhampton.gov.uk](mailto:WMPFEmployerSystemSupport@wolverhampton.gov.uk)

[General employer queries: WMPFEmployerLiaison2@wolverhampton.gov.uk](mailto:WMPFEmployerLiaison2@wolverhampton.gov.uk)

Dates for your diary

Date	Action
No later than: 15/05/2023	Submit your post go-live monthly submission preferences
No later than: 31/05/2023	Book your initial ESS training Respond to all outstanding data queries: <ul style="list-style-type: none">• Monthly submission feedback• S15s• McCloud data
No later than: 19/06/2023	<ul style="list-style-type: none">• Complete all outstanding monthly data files• Check your active member lists (and submit joiner/leaver notifications as required)• Log into Hub to ensure your access to ESS is created
20/06/2023	Monthly submission process switched off in Employer Hub
No later than: 23/06/2023	<ul style="list-style-type: none">• Submit all early leaver notifications (refunds, opt-outs after 3 months & deferreds) to 23/06/2023 via Employer Hub• Submit retirement notifications to 23/06/2023 via Employer Hub
No later than: 19/07/2023	<ul style="list-style-type: none">• Pay employer and employee contributions up to and including June 2023• Complete online remittance for June contributions
14/07/2023	Access to Employer Hub removed
24/07/2023	<ul style="list-style-type: none">• Go-live in ESS (employers), MSS (members) and Compendia Touch (WMPF)• Start to use new interfaces to submit your member changes (including hours and service breaks for all members) and leavers
26/07/2023	Phased monthly interface submission begins
No later than: 19/08/2023	Submit June and July monthly submission files via ESS