

McCloud data collection: April 2021-July 2023

template notes

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Introduction

In this guide we explain how to complete the second phase of our McCloud data collection.

This guide should be read along with the:

- McCloud LGPS data collection templates (Excel workbook)
- sample files
- Admin Referral guidance

The guide will support you in completing the second phase of our McCloud data collection.

You can access all of our supporting documents on the McCloud section of our [website](#).

There are two data collection spreadsheets that you must complete:

- Hours changes data
- service break data

Data collection

What's needed

For the period 1 April 2021 to 31 July 2023, you need to submit:

- hours changes for members within the period
- service breaks for members within the period
- one line of data per hours change or service break

Who to include in your submission

You need to provide hours changes and service break information for employees who were active members of the scheme during the collection period.

This includes:

- members who were active on 1 April 2021
- members who became active after 1 April 2021 up to 31 July 2023
- casual members - average weekly hours for each complete year in the submission, one row per year
- members with more than one post must have one pension record per post - you must take care to ensure that their hours changes or service breaks are recorded against the correct pension record

For casual members, you only need to submit two complete years of average weekly hours:

- 1 April 2021 to 31 March 2022
- 1 April 2022 to 31 March 2023

We expect that for casual members from 1 April 2023 to 31 March 2024 you will have submitted their annual average hours to us on an ESS Admin Referral. If you need more information about the treatment of casual members, take a look at our [guidance](#).

Handling re-joining members

If a member leaves the scheme and then re-joins within the period, their hours and service break for all periods of active membership should be included in the hours and service break files.

A reminder about member changes after the McCloud data collection period

You must continue to submit hours changes and service break data for **all members** from 1 August 2023 in real-time via the [standard interface file](#) using the [ESS interface upload process](#).

Data upload

Complete the actions below to submit your files:

1. Save your hours and service break files as csv (comma delimited) files.
2. Submit them via the Admin Referral process in [Employer Self-Service](#) (ESS).
3. Select 'McCloud 2021-2023' from the dropdown menu – this option will be available from 1 July 2025 to 30 September 2025.

McCloud LGPS data collection notes

Table 1 gives you an example of how to complete data fields 15a, 15b (on the ‘hours’ spreadsheet’), 19a, and 19b (on the ‘service breaks’ spreadsheet) where the member is part-time. We need this data to update the service history record for each member.

Table 2 provides you with a description of all the data fields (1 to 21) contained in both spreadsheets. This is to help you, or your payroll provider, understand what data should be entered in each field.

The hours and service break spreadsheets are laid out as follows:

- data fields 1 to 11 are the same in both spreadsheets and are needed to allow us to identify the member
- data fields 12 to 15b are specific to the ‘hours’ spreadsheet
- data fields 16 to 21 are specific to the ‘service breaks’ spreadsheet

What’s meant by part-time hours data?

LGPS 2013 regulations define a part-time employee as an employee who is neither full-time employee nor a variable-time employee.

For members with contracts shorter than 52 weeks (e.g., school support staff), do not reduce their hours. Report their actual part-time hours.

Example part-time hours

Member works 18 hours part-time, term-time and their full-time equivalent is 36 hours. The data fields should be completed as follows:

Table 1 part-time data example

	Data field 14	Data fields 15a & 19a	Data fields 15b & 19b
Example 1	P	18	36

What's meant by service break data?

You must submit service break data for all periods of authorised unpaid leave, absence for trade disputes, and unauthorised leave.

Authorised unpaid leave includes:

- any period of unpaid additional maternity or adoption leave - generally from week 40 to week 52, but may start from week 27
- any period of unpaid shared parental leave
- any period of unpaid parental bereavement leave
- any period of unpaid leave the member chooses to take, for example, time off for a sabbatical or where a member who works in a school wishes to take leave in term-time

Do not include service break data for:

- sickness absence – paid or unpaid
- ordinary maternity or adoption leave (first 26 weeks of leave)
- paid additional maternity or adoption leave (generally from week 27 to week 39)
- paternity leave
- reserve forces leave (where the employee chooses to stay in the scheme)
- paid shared parental leave
- paid parental bereavement leave

Table 2 McCloud data collection notes

Type of data field	Data field number	Title of data field	Description of data field	Format of data field
Data applicable to both spreadsheets	1	NI number	Member's National Insurance number	Letters and numbers Example: AB123456A
	2	Surname	Member's surname	Letters Example: Smith
	3	Forename	Member's forename	Letters Example: Jack
	4	Date of birth	Member's date of birth	Date Example: 01/01/1901
	5	Employer identifier	Employer reference number provided by WMPF	Numbers Example: 1999
	6	Employer name	Scheme employer's name	Letters Example: Townshire County Council
	7	Pension ref number	Member reference number provided by WMPF	Numbers – 8 digits Example: 10999999
	8	Payroll ref 1	The member's payroll or post number with the current employer	Letters and numbers Example: 123456 or 12345A

Type of data field	Data field number	Title of data field	Description of data field	Format of data field
	9	<i>Payroll ref 2</i>	<i>Leave this blank</i>	<i>Leave this blank</i>
	10	<i>Payroll ref 3</i>	<i>Leave this blank</i>	<i>Leave this blank</i>
	11	Status	Whether the member was active (C) or not (N) on 31 st July 2023	Letter (1 character only) C = contributing N = non-contributing
Part-time hours data in relation to the unique payroll reference	12	Date hours started	Start date of the member's new hours	Date Example: 01/01/2022
	13	Date hours ended	End date of the member's hours	Date Example: 31/01/2022
	14	Part-time indicator	Complete if the hours are part-time for the period	Letter (1 character only) P = part-time
	15	<i>Part-time hours %</i>	<i>Leave this blank</i>	<i>Leave this blank</i>
	15a	Part-time hours	This field should only be filled where the part-time indicator (data field 14) is set to P	Numbers Example: 17.5

Type of data field	Data field number	Title of data field	Description of data field	Format of data field
	15b	Full-time equivalent hours	This should be completed for all members and represents the full-time equivalent for the post/organisation	Numbers Example: 37
Service break data in relation to the unique payroll reference	16	Service break start date	The start date of the service break - the date that the member stopped paying contributions on the pensionable pay they would have if they had not been absent	Date Example: 01/01/2022
	17	Service break end date	The end date of the service break. If the service break extends beyond 31 July 2023, please enter 31 July 2023	Date Example: 31/01/2022
	18	Reason for service break	The reason for the service break A = authorised unpaid leave B = Absent due to trade dispute C = unauthorised leave	Letter (1 character only) Example: A
	19	<i>Part-time hours % during service break</i>	<i>Leave this blank</i>	<i>Leave this blank</i>

Type of data field	Data field number	Title of data field	Description of data field	Format of data field
	19a	Part time hours during service break	If the member was part-time during the service break, enter their part-time hours	Numbers Example: 17.5
	19b	Full-time equivalent hours during service break	This should be completed for all members and represents the full-time equivalent for the post/organisation	Numbers Example: 37
	20	Did member elect to purchase lost pension in full?	<p>If a member has a break in service of type A or B, they can choose to replace the pension they lost during that time. Buying lost pension keeps their protection for the:</p> <ul style="list-style-type: none"> • underpin • final pay calculation • 85-year rule <p>Confirm whether the member chose to buy back the lost pension in full.</p>	<p>Letter (1 character only)</p> <p>Y = member elected to purchase lost pension in full</p> <p>N = member did not elect to purchase lost pension in full</p>

Type of data field	Data field number	Title of data field	Description of data field	Format of data field
	21	Did member complete the contract?	If 'Y' is the answer to data field 20, did the member completed the contract	Letter (1 character only) Y = member completed the contract N = contributions ceased before contract end date

Disclaimer

The information contained in this note and accompanying McCloud LGPS Data Collection template has been prepared by the Local Government Association (LGA) on behalf of the Scheme Advisory Board (SAB). It was produced in conjunction with the McCloud implementation group ('the Group'). It represents the views of the Group and should not be treated as a complete and authoritative statement of the law. Readers may wish, or will need, to take their own legal advice on the interpretation of any piece of legislation. No responsibility whatsoever will be assumed by the LGA, SAB or the Group for any direct or consequential loss, financial or otherwise, damage or inconvenience, or any other obligation or liability incurred by readers relying on information contained in this note or accompanying template.