

Submit your 1 April 2021 to 31 July 2023 McCloud data

Admin Referral workflow

You must use Admin Referral workflow in Employer Self-Service (ESS) to submit your McCloud data for 2021 to 2023 to us. We won't accept data submitted through any other channel.

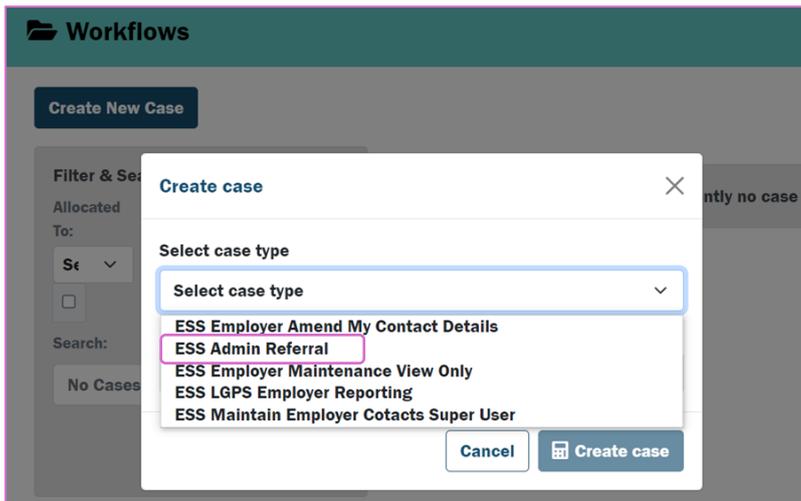
Important:

- data must be submitted using the approved [Scheme Advisory Board \(SAB\) file layout](#)
- you must only submit data for members that have hours changes or service breaks within the data collection period (1st April 2021 to 31st July 2023)¹
- please make sure that you [save your file as a .CSV \(comma delimited\)](#)
- submit one McCloud file per scheme employer (e.g., if you have five academies, submit five McCloud files)
- your submission window is open from 1st August 2025 to 30th September 2025, after which point the 'McCloud submission' option will be removed from the Admin Referral workflow, and your data will not be accepted

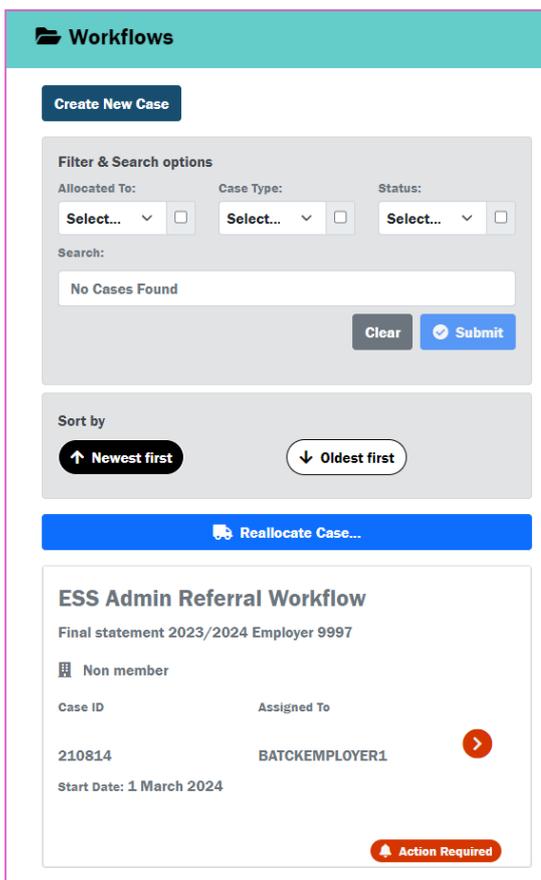
How to start the Admin Referral workflow

1. Log into [ESS](#).
2. In the *Workflows* tab, select *Create New Case*.
3. Choose *ESS Admin Referral* from the drop-down menu.

¹ All member changes (including hours changes and service breaks) from 1st August 2023 should be submitted to us using a [standard interface](#).



4. Enter a suitable case title
 - For example: 'Employer 1234 McCloud 2021-2023'.
5. Click *Create case*.
6. Find the new case in your *Workflows* case list and click on it to launch the workflow.



When the workflow launches, you'll see a brief description and a *Case ID*. Make a note of this ID for your records.

Case ID : 112622

Start Employer Workflow

Workflow Information

This workflow allows you to raise a query with the admin team. This could be a general enquiry or a query which relates to a member. You will be able to upload documents as part of the process.

Refresh **Next**

Submitting your McCloud April 2021 to July 2023 file

1. Select the relevant employer from the *Employer* drop-down menu.
2. Select *Employer Case* from the *Employer or Member level* drop-down menu.
3. Do not enter anything in the *Identity Check* fields.
4. Select *Search if Member or proceed for Employer* from the *Select Action* drop-down menu.
5. Click *Submit*.

Admin Referral Workflow - Identity Verification Inputs - Employer: 9997

Employer

Employer*
9997 - DEXTERS LTD

Member (If relevant)

Employer or Member level? *
Employer Case

Identity Check (Min 1.00 items required)

Member Number

Forename

Surname

NI Number

Date of Birth

1st Line of Address

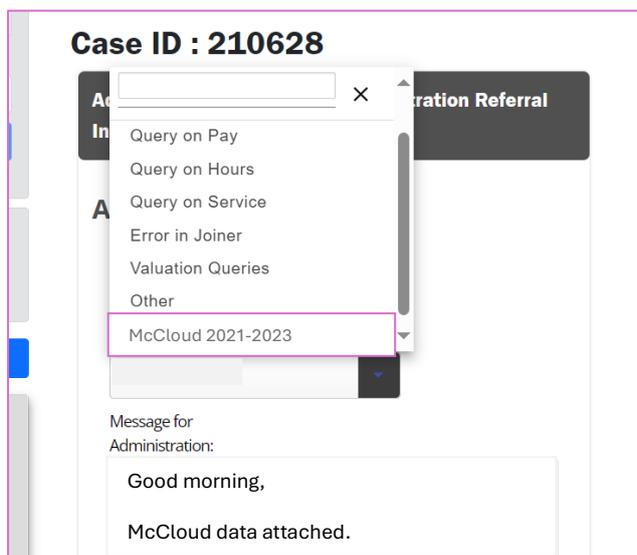
Postcode

Process Option

Select Action *
Search if Member or proceed for Employer

On the next screen:

1. Select *McCloud* from the *Reason for Referral* drop-down menu.
2. Write a brief message in *Message for Administration* box, e.g., 'Employer 1234 McCloud 2021-2023'.
3. Upload your McCloud data by clicking *Choose File* and finding your CSV file in its saved location.
4. The *File Title* should match the case title that you entered earlier.
5. Under *Admin Case Options* select *Continue* and then click *Next* to send your file to us.



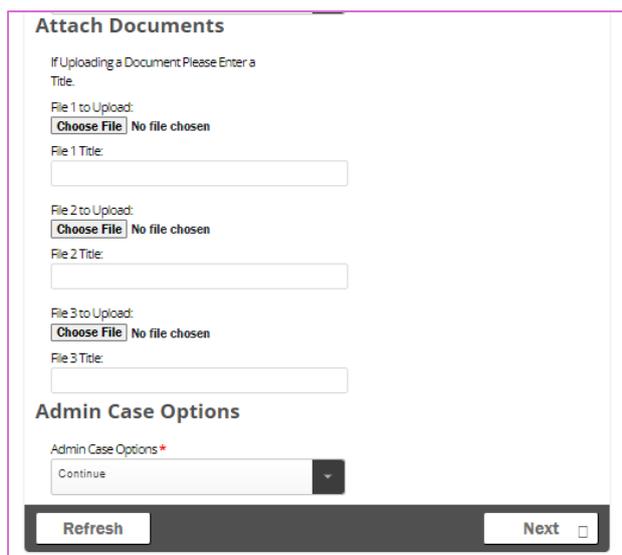
Case ID : 210628

Reason for Referral

- Query on Pay
- Query on Hours
- Query on Service
- Error in Joiner
- Valuation Queries
- Other
- McCloud 2021-2023

Message for Administration:

Good morning,
McCloud data attached.



Attach Documents

If Uploading a Document Please Enter a Title.

File 1 to Upload:
 No file chosen
 File 1 Title:

File 2 to Upload:
 No file chosen
 File 2 Title:

File 3 to Upload:
 No file chosen
 File 3 Title:

Admin Case Options

Admin Case Options *

Continue

Cases returned from us

Once we've received your submission, the case will return to your *Workflows* tab.

- Select *Query Resolved* under *Employer Case Options* to close the case.