

Employer Self Service User Guide

Altair system by



The contents of this Guide are copyright © 2012 Heywood Limited. Copying is prohibited, except in accordance with permissions.

Licensed *altair* users and *altair* Employer Services users are permitted to display and print copies of this documentation. They are also permitted to use extracts in the preparation of instructional and procedural materials for distribution to users of *altair* Employer Services within their organisation.

All other copying and distribution of any of the contents of this documentation is strictly forbidden.

Table of Contents

3	Navigation	3
3.1	Navigation Bar	3
3.2	Member Search Page	3
3.3	Member Information Pages	4
4	Updating Member Information	5
4.1	New Starter Creation	6
4.2	General Information	8
4.3	Part-Time Hours	9
4.4	Part time to full time	10
4.5	Notification of Leavers	10
14	Website	12
15	Contact us	12

3 Navigation

The *altair* Employer Services website is designed for ease of use, and is fully compatible with two of the most commonly used internet browsers: Microsoft Internet Explorer and Mozilla Firefox.

3.1 Navigation Bar

The navigation bar ('Member Search' down to 'Help') is present on the left of the screen, on each page of the Employer Services website.

The contents of the navigation bar change depending on the page, the selected member's status, and the information available about them.

3.2 Member Search Page

You can search for individual members by entering information about them, such as their National Insurance number (must be in CAPITAL letters), surname, status, scheme name, and employer.

You can perform a 'wildcard' search by using the '%' key. For example to search for members with surnames beginning with A, enter 'A%' in the 'Surname' box and click the Search button.

Cambridgeshire Northamptonshire Pension Fund Pension Fund LGSS

User: BARLOW10

Powered by equisheywood

Member Search

New Starter Creation

Documentation

Reporting

Upload Interface File

Security Options

Work Activities

Logout

Help

Member Search

Surname

NI Number

Status Active

Super Ref

Employer -- Select --

Payroll Ref

Scheme Name NCC Local Government Scheme

Dept Id

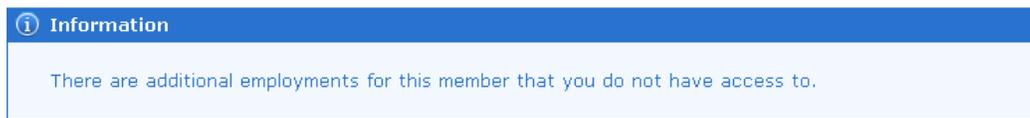
[Print Page](#)

The results of your search are displayed below the selection boxes, with details for each member shown. If you click 'select' and choose a member and if the member has only one employment/job/post, the Personal Details page is then shown.

If the member that you selected has more than one employment, the Employment List page is displayed.

The employment list includes the member's name, status, identification fields, scheme name, and job title, to assist you in selecting the correct employment.

The Employment List page will display a message if the member has employments/posts/jobs to which you do not have access.



You can navigate back to the employment list page at any time, without the need to logout and then login again.

When you select an employment the Personal Details page of a members record is displayed.

3.3 Member Information Pages

The first page to be displayed following the selection of a member is the Personal Details page.

You can use the Navigation Bar to move around a member's record and display different information. For example:

- Membership Details
- Transfer Details
- Financial Details
- AVCs and Added Years Details
- Pension Details
- P60 History
- Pensioner Payslip History
- Payslip Details
- Auto Enrolment
- Works Address

Note that the available information will vary depending on what status the member or employment is.

4 Updating Member Information

When you are first registered to use the Employer Services website, LGSS Pensions Service will set the method by which you can update information. The three options are:

- Read only
- Interface
- Direct

If you are granted read-only access, you can display information but not change it.

If you are approved to request changes, or make changes directly, you can update the following information for active members:

- New starter creation
- General information (for example, name, address and marital status)
- Part-time hours
- Notification of leavers

If you are approved to request changes, any amendments that you make are reviewed and processed by LGSS Pensions Service. Alternatively, if you are approved to make direct changes, amendments that you make are completed immediately. The only exception to this is notification of leavers, which will always be processed by LGSS Pensions Service on your behalf.

You will not be able to update member-level information, such as address and marital status, if a member has additional employment records to which you do not have access.

You only have access to 'active' member's records. The term 'Active' means those employees currently contributing to the Scheme. Therefore if you make a member a leaver and then need to amend their record you will not be able to. Please make amendments to a record before making them a leaver.

4.1 New Starter Creation

When the New Starter Creation option is selected from the main menu you are prompted for a National Insurance number:

If an existing member cannot be found with the National Insurance number specified, the New Starter Creation screen is displayed. This screen enables you to input information about the new starter:

Address (Line 1)	<input type="text"/>
Address (Line 2)	<input type="text"/>
Address (Line 3)	<input type="text"/>
Address (Line 4)	<input type="text"/>
Address (Line 5)	<input type="text"/>
Postcode	<input type="text"/>
Telephone Number	<input type="text"/>
Fax Number	<input type="text"/>
E-mail Address	<input type="text"/>

Auto Enrolment Entry Event	<input type="text"/>	▼	Auto Enrolment Status	<input type="text"/>	▼
----------------------------	----------------------	---	-----------------------	----------------------	---

*Required

For information on certain fields on this New Starter Creation form go to ‘General Information’ section below.

National Insurance number already on

If an existing member is found with the National Insurance number input, an initial screen of member-level information is displayed, such as address and marital status, and an option becomes available for you to create a new employment.

Matching Members Selection

The NI Number [redacted] has been matched to one or more existing members.

Member	[redacted]	Sex	Female	<input type="button" value="Create Employment"/>
Date of Birth	27/04/1948			

Member Number	Employment Info	Job Title
	Exit - No Liability Scheme : 001 Location 00050 Class 01	
	Active Scheme : 001 Location 00050 Class 05	
123456	Active Scheme : 001 Location 00050 Class 05	

If an existing member is found with the National Insurance number specified, to whom you do not have access, you must first verify the member’s basic details.

Verify Member Details

The NI Number [redacted] matches to a member to whom you do not currently have access. To proceed to employment creation, please confirm the following details for the member.

Surname* Date of Birth*

Sex*

*Required

On successful completion of this screen, you are presented with the standard New Starter screen. You cannot change member level data using this screen.

4.2 General Information

From the Member Update menu, select the General Amendments option. This enables you to update the following information:

- Name
- Title
- Marital status
- Date of marriage
- Spouse date of birth
- Address

The screenshot shows the 'Member General Information Update' form. The header includes the Cambridgeshire Northamptonshire Pension Fund logo and the LGSS logo. The user is identified as 'User: MARKMCAULIFFE0604' and the member is 'Active'. The form contains the following fields:

- Surname: [Text Input]
- Super Ref: 001JW9446992
- Dept Id: [Text Input]
- Marital Status: Single (Dropdown)
- Spouse's DOB / DOD: [Text Input]
- Address (Line 1-5): [Five Text Inputs]
- Postcode: [Text Input]
- Telephone Number: [Text Input]
- Fax Number: [Text Input]
- E-mail Address: [Text Input]
- Historise Address:
- Update Previous:
- Payroll Ref: 123456-2
- Title: Miss (Dropdown)
- Date of Marriage: [Text Input]
- Employment No.: 1

A 'Save Changes' button is located at the bottom of the form.

You cannot change member level information if the member has employments to which you do not have access. This could mean another active employment or a past employment that has now ceased. You will be told this in an information box as below.

Information

There are additional employments for this member that you do not have access to, therefore the member-level data is read-only.

The following warning message will appear to also inform you.

Warning

Please do not update members Email Address as this could disable Member Self Service (MSS) for this member.

Along with the above messages the screen will appear with the fields a lighter colour grey, which you will not be able to update.

Surname	Smith	Update Previous	<input type="checkbox"/>
Super Ref		Payroll Ref	144971
Dept Id		Title	Mrs
Marital Status	Married	Date of Marriage	
Spouse's DOB / DOD		Employment No.	
Address (Line 1)	6 Parkhall Road		
Address (Line 2)			
Address (Line 3)			
Address (Line 4)	Somersham		
Address (Line 5)	Cambridgeshire		
Postcode	PE28 3EU		
Telephone Number			
Fax Number			
E-mail Address	Joanna.Smith@cambridgeshire		
Historise Address	<input type="checkbox"/>		

If you are unable to update the address of a member we suggest that you inform the member to update their address on [Member Self Service](#) (MSS).

If this is not possible then send an address update email to Pensions@northamptonshire.gov.uk and LGSS Pensions Service will update.

4.3 Part-Time Hours

After selecting a member, the Member Part-Time Hours Update option enables you to make one or more part-time hour amendments to a member's record. The hours have to be recorded in one of two ways:

Hours recording

The hours are recorded in the format of 'dd.dd/dd.dd' ('d' being a digit).

An example is; '30.00/37.00'. Where 30.00 is the hours worked by the individual. (Do not put '30'). The second value, for example, '37.00' is the full time equivalent for that post and again has to be in this format. (Do not put '37').

or

Percentage recording

You have the option of inputting the hours in a percentage format, for example: 81.08108 (This is the equivalent to 30.00/37.00).

The above part time recording needs to take into account Term Time working and therefore your calculation should reflect this. So if you have a member working:

- 30 hours per week – with full time equivalent being 37 hours per week
- 45 weeks per year - the equivalent full time weeks per year is 52.1429;

What should be recorded is: $30 \times 45/52.1429 = "25.89/37.00"$.

Please note that 52.1429 is a common number but your organisation might use a different number.

Member Part-Time Hours Update

Date Comm Curr Emp	01/03/2015	PT Hours/Percentage	20.00/37.00
Part-Time Ind	Y	Statutory Notice	<input type="checkbox"/>
Date of Change	<input type="text"/>	Percentage	<input type="text"/>
		Ratio	<input type="text"/> / <input type="text"/>
			<input type="button" value="-"/>
			<input type="button" value="+"/>
<input type="button" value="Save Changes"/>			

4.4 Part time to full time

To change the record of a part time member to full time, use the Part Time Hours Update facility as described above in 4.3. Input the date of change in the box provided and then leave the rest of the boxes (percentages and hours) blank. Click 'Save changes'. The member should now be recorded as full time.

4.5 Notification of Leavers

LGSS Pensions Service will always process a leaver and send to the member their entitlement to benefits letter. In this section you are informing us that a post or employment is no longer active – either a leaver (left employment, redundancy or retired), death or an opt out. Then you will need to send us a leaver certificate (see section 6.4) with information regarding this post.

If you have processed an opting out member with less than three months pensionable service and you have written back pension contributions through the payroll system and they have a record on Employer Self Service, you will need to notify us that they have opted out by completing the Notification of Leaver form. Then send us an email confirming that you have written the pensions contributions back through your payroll system.

When LGSS Pensions Services processes this post or employment there might be further information or clarification required before we write to the member.

From the Menu list, hover over 'Member Update', then click the 'Notification of Leaver' option. The following screen is displayed:

Notification of Leaver

Please enter leaver details.

Date Left*	<input type="text"/>
Exit Event	<input type="text"/>
Address (Line 1)	<input type="text"/>
Address (Line 2)	<input type="text"/>
Address (Line 3)	<input type="text"/>
Address (Line 4)	<input type="text"/>
Address (Line 5)	<input type="text"/>
Postcode	<input type="text"/>
Telephone Number	<input type="text"/>
Fax Number	<input type="text"/>
E-mail Address	<input type="text"/>
Historise Address	<input checked="" type="checkbox"/>

* Required

Save Changes

Use this screen to enter the member's date of leaving and reason for leaving. You can also review the member's current address, and update it if necessary.

When you click the 'Save Changes' button the leaver information is sent to LGSS Pensions Service for review and processing. Even though this process does not happen immediately if you have found that you put in an incorrect date after clicking save changes do not go through this leaver notification process again and send a second notification, instead email LGSS Pensions and let them know the details.

A leaver certificate document should now be produced and the system should be showing you a screen that looks like the image below. If it does not then there is a problem that we need to investigate but in the meanwhile you can still complete the leaver by sending a leaver certificate by following the steps at section 6.4.

View Member Documents

Information

Leaver information successfully submitted.

Leaver document (EMPLEAVEN) generated successfully.

Please select the document you wish to view from the list below. If you have recently chosen to generate a member document and it does not appear here, it may still be being generated, refresh the page to update the list.

Document	Date	Amendable
Employer Leaver Cert D update	08/02/2016 14:10:39	Yes

Click the document name shown above and 'Save As' and save this document to your own computer drive keeping the file name the same – do not change the file name. Clear the document from your screen.

Open the document from your own drive and go through and complete the whole form. Then save your changes.

In Employer Self Service system click on 'Documentation' then click Upload Word Document. Go and find the leaver form from your drive and upload to Employer Self Service.

14 Website

For further information please see our websites at:

<http://pensions.cambridgeshire.gov.uk/>

<http://pensions.northamptonshire.gov.uk/>

15 Contact us

Contact details are:

General pensions information: Pensions@northamptonshire.gov.uk

Employers Team: PenEmployers@northamptonshire.gov.uk

Postal address:

LGSS Pensions Service
John Dryden House
8-10 The Lakes
Northampton NN4 7YD