

# i-Connect Onboarding Guide

Setting up a payroll account V5



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## Revision History

Vsn	Date	Updated By	Approved By	Details of Amendment
1.00	25/10/2016	P Stocks	C Lewis	First release
2.00	13/06/2018	K Pridgeon	J Dale/E Fisher	Rebrand
2.01	04/07/2018	J Dale	C Lewis	Updated with rebranded images
2.02	01/07/2019	J Dale	C Lewis	Genesee release update
4.00	01/06/2020	J Dale	C Lewis	Hudson release update
5.00	02/02/2024	C Lewis	I Baker	Rebrand and Update to the Wye release



# Introduction

i-Connect is a cloud service that manages the flow of employee information from your payroll system to your fund's pension administration system.

This guide explains the i-Connect onboarding process.

Onboarding consists of two one off stages:

- Creating a payroll record
- Matching employee payroll records to pension records

Once you have completed the steps in this document you will be able to update your pension fund's system with all the personal and financial information, they need to administer the Local Government Pension Scheme on behalf of your active employees.

## Who to Contact

If you have any questions about using the i-Connect service, please contact your pension fund.

## Payroll Creation

The Payroll Wizard can be initiated in two different ways, depending on if there are existing payrolls or not.

### Method One - No Existing i-Connect Payrolls

The Payroll Wizard will launch automatically the first time you log into i-Connect after registering if you don't have access to any existing payrolls.

### New Payroll

There are currently no payrolls available for this employer. To setup this employer, please create a payroll.

This page is used to set up a new payroll which will be managed via i-Connect. Enter the details for the new payroll in the form below.

Employer Name	Sale Town Council
Payroll Name	<input type="text"/>
PAYE Reference	<input type="text"/>
NI Match Type	<div>Full</div>
Auto Process	<input type="checkbox"/>
Submission Retention Period (Years)	<div>1</div>
Next Payroll Period End Date	<input type="text"/>

Proceed

**New Payroll page**


# Method Two - Access to Existing i-Connect Payrolls

If you already have access to an i-Connect payroll, you will see a reminder link on the Payroll Dashboard.

**Quick Actions**

<b>Employers</b> Manage employers and payrolls	<b>Reports</b> Generate and view reports	<b>Admin</b> Onboard employers Configure events Manage workflows	<b>Users</b> Manage users and permissions	<b>History</b> View submission history
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**Reminders**

 **South Hale Dist Council** has been onboarded and you are now managing this employer. Click here to create the first payroll.

## Payroll Dashboard

Select the **Reminders** banner to start the Payroll Wizard.



## Payroll Wizard

Hover your mouse over any icon, button, input box or field to display a tooltip to help you.

### New Payroll

This page is used to set up a new payroll which will be managed via i-Connect. Enter the details for the new payroll in the form below.

Employer Name	South Hale Dist Council
Payroll Name	<input type="text" value="South Hale Monthly"/>
PAYE Reference	<input type="text" value="492/CCC"/>
NI Match Type	<input type="text" value="Full"/>
Auto Process	<input type="checkbox"/>
Submission Retention Period (Years)	<input type="text" value="3"/>
Next Payroll Period End Date	<input type="text" value="31-10-2023"/> 

**Proceed**

### New Payroll page

Complete the first page of the wizard by entering information into the following fields:

Field Name	What to Enter
Payroll Name	Enter a meaningful name that you will remember.
PAYE Reference	Enter your HMRC PAYE reference (if known).
NI Match Type	Leave this as the default setting of 'Full'.
Auto Process	By ticking this box, i Connect will process automatically if no errors are found. We recommend you leave this box unchecked for the first few months of processing.
Submission Retention period (years)	The default for retaining a history of file processing in i-Connect is one year. You can change this to either two or three years.
Next Payroll Period End Date	This defaults to the current date. You must change it to the payroll period end date from which you will start using i-Connect.

Select the **Proceed** button to progress to the next step of Payroll Wizard, which is the **Edit Payroll Period** page.

### Edit Payroll Period

✓ Payroll successfully created. You will now be prompted to define the payroll period type, tolerances and email configuration for the new payroll.

Select the payroll period frequency in the box below.

Do you pay

**Proceed**

### Edit Payroll Period page

Select the **Proceed** button to progress to the next step of the Payroll Wizard, which is the **Edit Payroll Period** page.

## Edit Payroll Period

Select the expected submission date of the payroll extract for this payroll.

What is your typical payroll period end date? (Day of Month)

31

What is your submission date? (Day of Month)

27

Proceed

### Edit Payroll Period page

Select the day of the month for both the **What is your typical payroll period end date?** and the **What is your submission date?** drop-down lists. The submission date is used to generate reminder emails and the date is generally just after your payroll cut-off date (as the i-Connect payroll extract file can be created any time after the payroll has closed.).

Select the **Proceed** button to progress to the next step of the Wizard.

## Edit Payroll Period

Select when you would like email reminders to be sent out for the payroll file submissions for this payroll.

Prior Submission Reminder (Number of Days)

7

Late Submission Reminder (Number of Days)

3

Proceed

### Edit Payroll Period page

This step sets submission reminders. Change the default values for the reminders to submit the i-Connect extract file or if you are late submitting the file, based on whether you pay monthly, four-weekly, fortnightly, or weekly.

Select the **Proceed** button to progress to the next step of the Payroll Wizard, which is the **Edit Payroll Tolerances** page.

i-Connect checks the payroll tolerances during each payroll extract file upload and outputs a validation warning if the tolerance is breached.


Enter the value for each option to set payroll tolerances and select either the **Amount** or **Percentage** radio buttons for each one. The available options are:

- Employee Contributions
- Employer Contributions
- Member Address Updates
- New Starters (mandatory)

- Payroll Members (mandatory)
- Pensionable Pay

### Edit Payroll Tolerances

Please enter the allowed tolerances for a payroll submission. The tolerances may either be the amount difference from one payroll submission to the next, or the percentage change. A tolerance on the total number of payroll members processed is mandatory, but all other tolerances may be left blank if they are not required.

Employee Contributions	<input type="text" value="10.00"/>	<input type="radio"/> Amount <input checked="" type="radio"/> Percentage
Employer Contributions 	<input type="text" value="10.00"/>	<input type="radio"/> Amount <input checked="" type="radio"/> Percentage
Member Address Updates	<input type="text" value="10.00"/>	<input type="radio"/> Amount <input checked="" type="radio"/> Percentage
New Starters	<input type="text" value="10"/>	<input checked="" type="radio"/> Amount <input type="radio"/> Percentage
Payroll Members	<input type="text" value="10"/>	<input checked="" type="radio"/> Amount <input type="radio"/> Percentage
Pensionable Pay	<input type="text" value="10.00"/>	<input type="radio"/> Amount <input checked="" type="radio"/> Percentage

**Proceed**

### Edit Payroll Tolerances page

Select the **Proceed** button to progress to the final stage of the Payroll Wizard, where you can configure i-Connect email alert notifications:

### Edit Payroll Email Configuration

Configure the email alert policy for this payroll using the form below. You must enter at least one email address, as addresses will be used to send out reminders as well as receive the selected notifications.

#### Email Stages

- ☒ Tolerance failure(s)
 ☒ Target system errors detected
 ☒ Target system processing completion

#### Email Addresses

☐

**Add Email Address** **Remove Selected Email Address(es)**

**Complete Payroll Configuration**

### Edit Payroll Email Configuration page

Tick the checkboxes in the **Email Stages** section for each email you would like to receive. You do not have to select any of the checkboxes. The options are:

- Tolerance failure(s)
- Target system errors detected
- Target system processing completion

Select the **Add Email Address** button to enter your email address and tick the adjacent checkbox. You must enter at least one email address before you can complete the new payroll configuration. You can add additional email addresses by selecting the **Add Email Address** button and repeating the above step.

Select the **Complete Payroll Configuration** button.



A summary of the choices you made in the Payroll Wizard is displayed on the **Payroll Details** page.

## Payroll Details

✓ Payroll details saved successfully. Click here to begin the member matching process for this payroll.

Details for this payroll as stored on i-Connect are displayed below.

Employer Name	South Hale Dist Council
Payroll Name	South Hale Monthly
Payroll Status	Inactive (awaiting member matching file submission)
PAYE Reference	492/CCC
Interface Name	Default
NI Match Type	Full
Auto Process	
Retention Period	3 Year(s)
Next Payroll Date	31-10-2023
Payroll Period Type	Monthly
Submission Day	27
Prior Reminder	7 Day(s)
Late Reminder	3 Day(s)
Tolerances	Employee Contributions : 10%
	Employer Contributions : 10%
	Member Address Updates : 10%
	New Starters : 10
	Payroll Members : 10
	Pensionable Pay : 10%
Email Addresses	payroll@southaledc.org.uk
Email Stages	Tolerance failure(s)
	Target system errors detected
	Target system processing completion

Edit Payroll Details

Edit Payroll Period

Edit Payroll Tolerances

Edit Email Configuration

### Payroll Details page

You can change any of your choices by selecting the relevant edit button at the bottom of the page.

## Additional Payrolls

If you have more than one payroll, for example, a monthly payroll and a weekly payroll, you can create additional payrolls by selecting the **New Payroll** button located at the top of the **Payroll Details** page, or by returning to the Payroll Dashboard and selecting the **Employer** icon.

## Member Matching

Member matching is a one-off exercise that creates a 'one-to-one' link between each post on your payroll system and each active record on the fund's pension administration system.

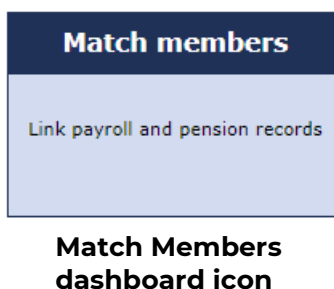
The link is created by comparing the following fields from your payroll system against the active pension administration records of each of your employees on the administering authority's target system.

i-Connect uses the following fields to match payroll records to pension records:

- NI Number
- Payroll Reference
- Date of Birth
- Surname
- Gender

Any unmatched records in the payroll extract file will be created as starters or opt-outs when your first business as usual file upload is processed.

Select the **Match members** icon on the Payroll Dashboard to begin.



i-Connect will prompt you to browse to the location on your network where the payroll extract file is stored.



### Member Matching

Prior to payroll submission processing, members on the target system must be matched with those on a payroll file. Please click on the 'Browse' button to choose a payroll file to upload for the member matching process.

Use the explorer window to navigate to the file you wish to upload, click on it to select it and then select 'Open'.

Click 'Upload File' to upload the file to i-Connect.

Choose File

Browse

Upload File

Member Matching page

Select the **Browse** button, navigate to the file location, and select the **Upload File** button.

i-Connect then processes the file, matching payroll records to pensions records. This process can take approximately 20-30 minutes to complete. If the process is still running after one hour, please contact the i-Connect service desk ([support@i-Connectdata.co.uk](mailto:support@i-Connectdata.co.uk)).

Should you log out before the process has completed, i-Connect will send you an email to advise you that the initial process has completed, and you can start the next stage of member matching.

When the comparison processing completes, a new page will be displayed showing a summary of the member matching.

### Member Matching

Below are the current statistics of the member matching process for this payroll.

Click 'View Next Conflict' to view the next member conflict to be resolved.

Members on payroll file	20
Exact matches	16
Unmatchable members	1
Members found in conflict	3
Number of conflicts resolved	0
Progress	<div></div>

View Next Conflict

Cancel Matching Process

Member Matching summary page

You can log out at any stage during the member matching process, even during the conflict resolution stage. i-Connect will remember your progress and update the **Member Matching** table with the number of conflicts resolved.



Members in the payroll extract file are placed into the following categories:

- Exact matches
- Unmatchable members
- Members found in conflict



## Resolving Member Match Conflicts

Start resolving member match conflicts by selecting the **View Next Conflict** button. The first member matching conflict will be displayed.

### Member Matching

Below is a member located on the payroll file that could not be matched exactly to a member in the target system. Please select the member from the target system that matches this member or indicate that the potential match is either a new starter, multiple employment or has opted out of the scheme.

#### Payroll Member

Payroll Reference	NI Number	Surname	Date of Birth	Gender	Job Title	Status
40016	UD040016A	Dale	15-02-1993	Female	Pensions Office	Active

#### Target System Potential Matches

Mismatched data fields on the target system are highlighted in **red**.

Any potential matches that are greyed out have already been matched during this matching process. These can be matched to this member by clicking 'Undo / Match', which will undo the existing match to that member and create a new match to the payroll member on the screen.

Potential matches in differing locations cannot be selected and are displayed for information only.

	Payroll Reference	NI Number	Date of Birth	Gender	Surname	Forename	Ident1	Ident2	Ident3	Job Title	Scheme	Status
<input type="radio"/>	40016	UD040016A	15-02-1993	Female	Stafford	Lesley	40016	DEMO	TRAFFORD	Pensions Office	001	Active

Matching Progress 0 / 3 member conflicts resolved

**Confirm Member Match** This member is a new starter / has opted out of the pension scheme

### Member Matching page

You may need to speak to your pension fund to help with the member matching decision making process.

The **Payroll Member** table displays payroll member information uploaded from the payroll extract file. The **Target System Potential Matches** table displays potential matches on the fund's system.

If you agree with a potential match, select the relevant radio button, and select the **Confirm Member Match** button. If you disagree with the potential matches displayed in the table, select the **This member is a new starter / has opted out of the pension scheme** button.

i-Connect will then create a new record on your administering authority's target system for the payroll member.

If a potentially matched member on the target system has already been matched, you can break the existing match and create a new one.

i-Connect will display a message when all member conflicts have been resolved.

Any unmatched members are displayed on the same page:

**Member Matching**

✓ Member conflict resolved.

Below is a list of the members from the payroll file which could not be matched to any members on the target system. Please confirm that these members are new starters or are opted out of the scheme.

Total Number of New Starters : 1

[Export to CSV](#)

Payroll Reference	NI Number	Surname	Date of Birth	Gender
40017	UD040017A	Stocks	16-10-1976	Female

These members are new starters / have opted out of the pension scheme

### Member Matching page

Select the **These members are new starters / have opted out of the pension scheme** button. i-Connect will then display a message stating that unmatchable members confirmed as new starters or opted out of the scheme, along with the results of the member matching process.

**Member Matching**

✓ Unmatchable members confirmed as new starters or opted out of the scheme.

Below are the current statistics of the member matching process for this payroll.

Members on payroll file	20
Exact matches	16
Unmatchable members	1
Members found in conflict	3
Number of conflicts resolved	3

Progress

[Confirm Matching Complete](#) [Reset All Matches For Submission](#) [Cancel Matching Process](#)

### Member Matching confirmation message

Complete the member matching process and proceed to the payroll update stage by selecting the **Confirm Matching Complete** button. Alternatively, you can reset all matches and begin member matching again by selecting the **Reset All Matches For Submission** button.

To cancel the entire member matching process, select the **Cancel Matching Process** button.

## Payroll Update

The payroll update stage begins automatically when you select the **Confirm Matching Complete** button. Member data on the fund's system is updated with the mis-matched payroll reference numbers.

## Payroll Synchronisation Page

i-Connect displays the **Payroll Synchronisation** page after the payroll update has completed:

### Payroll Synchronisation

The payroll data stored in i-Connect requires synchronising with the target system before the next payroll file can be uploaded. Please press the 'Synchronise' button below to begin this process.

Synchronise

### Payroll Synchronisation page

Select the **Synchronise** button to update i-Connect with data from the target system. This ensures that all member matches are maintained for future payroll file uploads, provided that the payroll records remain on the monthly payroll extract file.

Once the payroll synchronisation process completes, the payroll is ready for regular business as usual processing.

### Upload File

Please click on the 'Browse' button to choose a payroll file to upload. Use the explorer window to navigate to the file you wish to upload, click on it to select it and then select 'Open'. Click 'Upload File' to upload the file to i-Connect.

The next expected payroll period end date for a payroll file upload is: **30-04-2023**

Choose File

Browse

Upload File

### Upload File page

## Want to Know More?

Look at these guides:

- i-Connect User Management Guide
- i-Connect File Upload Guide
- i-Connect Online Return Guide
- i-Connect Reporting Guide

