



Norfolk Pension Fund



Norfolk Pension Fund PensionsWeb



Local Government Pension Scheme

Guide to the Employer Portal

Issue 6 : Feb 2018

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<http://portal.norfolkpensionfund.org>

There are two sections to PensionsWeb:

Employer Portal for Employers (covered by this guide)

Member Online for Employees (see guide G051)

What can I do on the Employer Portal?

On the Employer Portal you can:

- Access all the Forms and Guides, Newsletters and Employer events
- Upload and download documents via a secure exchange
- Search for and view your individual scheme members' details (excluding personal information)
- View contact details for Norfolk Pension Fund
- Manage your own contact details and set up new Employer Portal Users
- Upload multiple starters, hours, name and address changes using Bulk Processes
- Submit forms for individual members from a list of pre-populated Online Forms



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Registering to use the Employer Portal

Are you a new
'Scheme Employer'
with the Norfolk
Pension Fund?

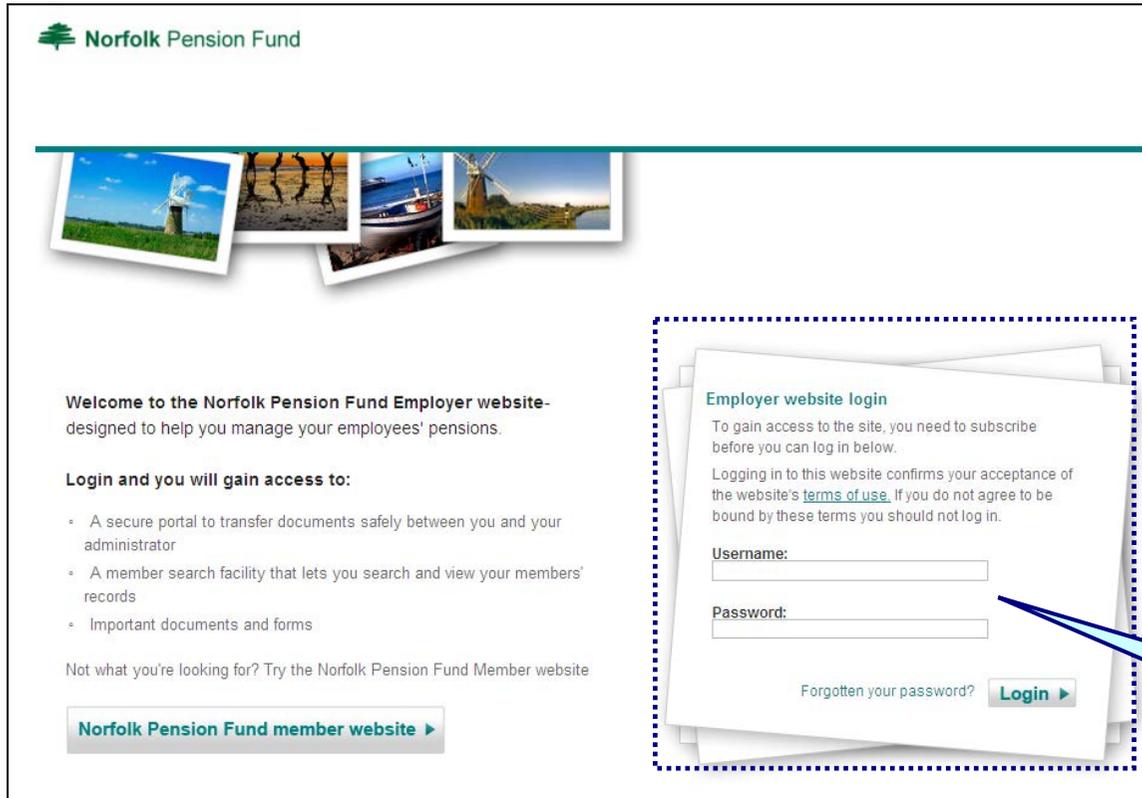
If you are a new Scheme Employer
your 'Username' and 'Password' will
have been supplied by Norfolk
Pension Fund

If you are not a new
'Scheme Employer'
but are a new
Employer Portal
user...

Your 'Password' will be provided by
the colleague who set you up. Your
'Username' will be provided by
Norfolk Pension Fund



Logging in to the Employer Portal for the first time



The screenshot shows the Norfolk Pension Fund Employer website. At the top left is the logo and name "Norfolk Pension Fund". Below it is a horizontal line and a row of four small images: a windmill, a field, a boat, and a windmill. The main content area has a heading "Welcome to the Norfolk Pension Fund Employer website- designed to help you manage your employees' pensions." followed by a sub-heading "Login and you will gain access to:" and a bulleted list of benefits. A button for "Norfolk Pension Fund member website" is at the bottom left. On the right, a dashed blue box highlights the "Employer website login" form, which includes a "Username:" field, a "Password:" field, a "Forgotten your password?" link, and a "Login" button with a right-pointing arrow.

The initial log in page for
The Employer Portal is:

<https://portal.norfolkpensionfund.org>

Step 1 of 2

Enter your 'Username' and 'Password'
then click 'Login'



Logging in to the Employer Portal for the first time

Norfolk Pension Fund

Welcome to the Norfolk Pension Fund Employer website- designed to help you manage your employees' pensions.

Login and you will gain access to:

- A secure portal to transfer documents safely between you and your administrator
- A member search facility that lets you search and view your members' records
- Important documents and forms

Not what you're looking for? Try the Norfolk Pension Fund Member website

[Norfolk Pension Fund member website ▶](#)

Employer website login
Now you must specify 5 unique security questions and answers below.

Question 1
Answer:

Question 2
Answer:

Question 3
Answer:

Question 4
Answer:

Question 5
Answer:

[Login ▶](#)

If you have any concerns about material which appears on our site, please contact lgpensionsweb@hymans.co.uk

Thank you for visiting our site.

Step 2 of 2

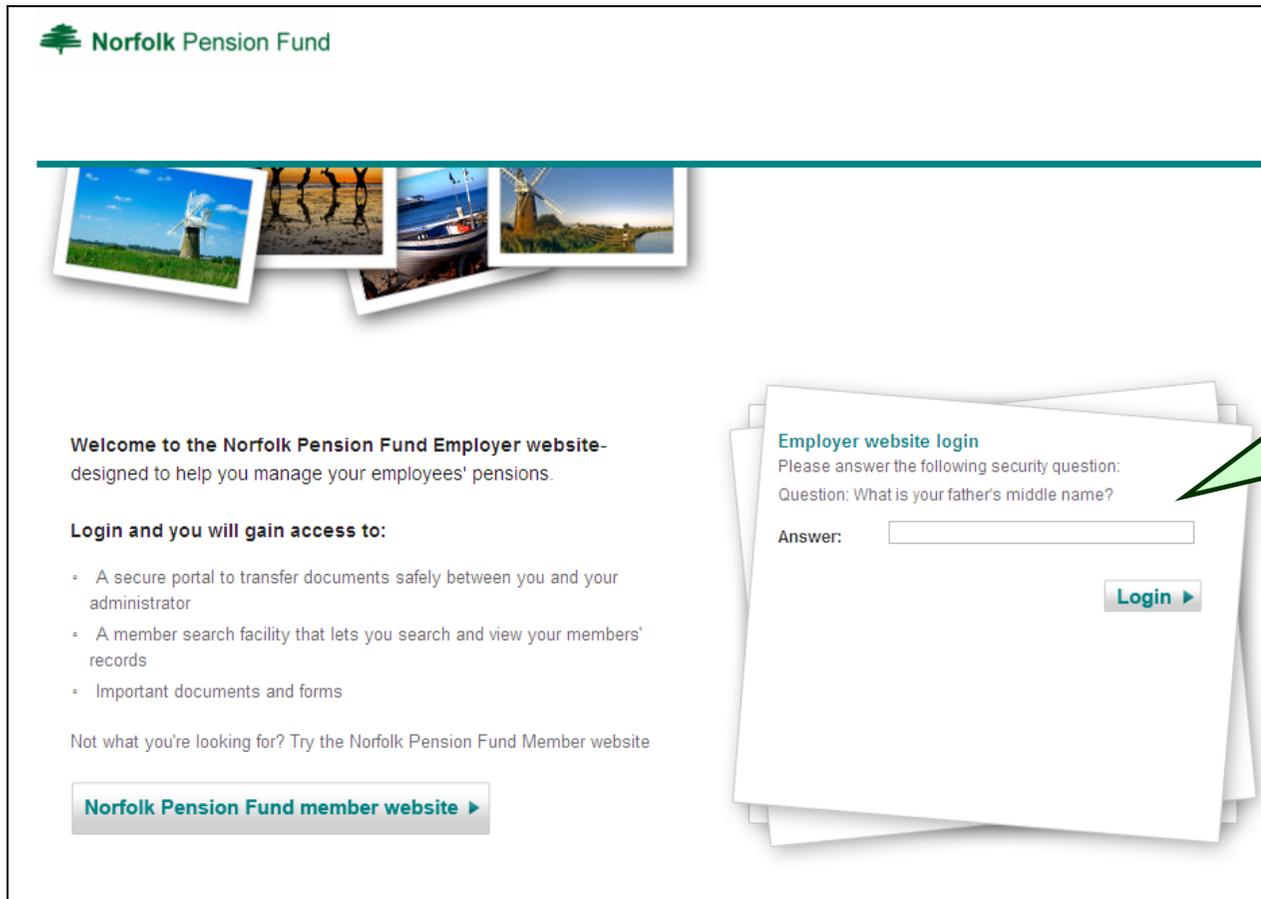
The first time you activate your account, you will need to provide the answers to 5 security questions. Click 'Login'.

Review the Terms and Conditions of the website. You will need to accept these conditions to enter the website.

Remember your security answers as you will be asked one at random each time you log in



Logging in to the Employer Portal



Norfolk Pension Fund

Welcome to the Norfolk Pension Fund Employer website-
designed to help you manage your employees' pensions.

Login and you will gain access to:

- A secure portal to transfer documents safely between you and your administrator
- A member search facility that lets you search and view your members' records
- Important documents and forms

Not what you're looking for? Try the Norfolk Pension Fund Member website

[Norfolk Pension Fund member website ▶](#)

Employer website login
Please answer the following security question:
Question: What is your father's middle name?

Answer:

[Login ▶](#)

Every time you log in to the Employer Portal you will need to answer one of your security questions after your username and password have been entered



Home

Different Screens available to view:

Home

Summary page

My Documents

Documents uploaded and downloaded

Bulk Processes

Upload multiple changes to member data

Member Search

Search Member data
Upload individual changes to member data

Resources

Forms and Guides available to view or download

Contacts

Your contact details
NPF contact details

You're in! This is the Employer Portal Homepage

The homepage provides a **summary** of each of the functions available. A more detailed screen can be viewed by clicking on the links in the grey banner.

Logged in as: Username
Employer: ANOTHEREMPLOYER
Last log in: 09:58:51 on 30 January 2018
[Change password](#) [Log out](#)

[Home](#) [My Documents](#) [Bulk Process](#) [Member Search](#) [Resources](#) [Contacts](#)

Announcements [view all >>](#)

Year End 2018
[Bulletin more](#)
26/01/2018

Latest documents from administrator [+](#)

Latest uploads by ANOTHER EMPLOYER [+](#)

Bulk processes

Joiners
Provide details of joiners to the pension scheme

Changes
Provide details of changes to members' pensions records

Year End
Provide your year end file to the pension scheme

Need help with the bulk processes?
[Find out more >>](#)

Contacts [view all >>](#)

Norfolk Pension Fund
Telephone: 01603495923

Website Queries
Telephone: 01603222132

Resources [view all >>](#)

[G020 - Contributions Guide \(Issue 8 Jan 2018\).pdf](#)
Employer Contributions Guide

[G001 - Employer Handbook \(Issue 7 Jan 2018\).pdf](#)
Employer Handbook

[MISC001 - 16 \(Nov 2017\) LGPS Pension Sharing on Divorce - schedule.pdf...](#)
LGPS Divorce - schedule

[Employer Newsletter 2017 Autumn.pdf](#)
Autumn 2017

[ABS4 - 2017 FAQ's \(Issue 9 Aug 2017\).pdf](#)
ABS FAQ's

Here you can see who is **logged in** and the time of the last log in.

You are also able to change your **password**.

Click '**Log out**' to exit the Employer Portal

See '**Announcements**' here.

The Norfolk Pension Fund will use this to bring your attention to any urgent or important matters.

Click '**...more**' to see the full message or '**View all >>**' for all announcements

A small selection of Norfolk Pension Fund contacts.



My Documents

How do I **download** a document from the Norfolk Pension Fund?

To download a document from the Norfolk Pension Fund, click **the document name**.
(Under 'Latest documents from administrator').

My Documents 'Latest documents from the administrator'

These are the documents we have uploaded for you.

Norfolk Pension Fund will notify you when we upload a document to the website that you need to log in and download.

Documents not downloaded after 30 days are automatically deleted.

The screenshot shows the 'My Documents' section of the Norfolk Pension Fund portal. At the top, there is a navigation bar with links: Home, My Documents, Bulk Process, Member Search, Resources, and Contacts. Below this, there are two main sections:

- Latest documents from administrator**: This section contains a table with columns: Upload date, Uploaded by, File type, Document name, Employer, Downloaded by, Download date, and Select. A single row is visible with the following data: 02/05/2014, I. Carriage, General Doc, **Test document.doc** (highlighted with a dashed box), and I. Carriage. Below the table are pagination controls showing '1 to 1 of 1 rows' and a '20' dropdown menu. There are also 'Export' and 'Download selected' buttons.
- Latest uploads by ANOTHER EMPLOYER**: This section contains a table with columns: Upload date, Uploaded by, Employer, File type, Document name, Downloaded by, Download date, and Select. A single row is visible with the following data: 18/02/2015, I. Carriage, ANOTHER EMPLOYER, Form, [Member leaving](#), I. Carriage, Not available, and a checkbox.

My Documents

'Latest uploads by xxxxxxxx'

These are the documents you have sent securely to the Norfolk Pension Fund



How do I **upload** a document to the Norfolk Pension Fund?

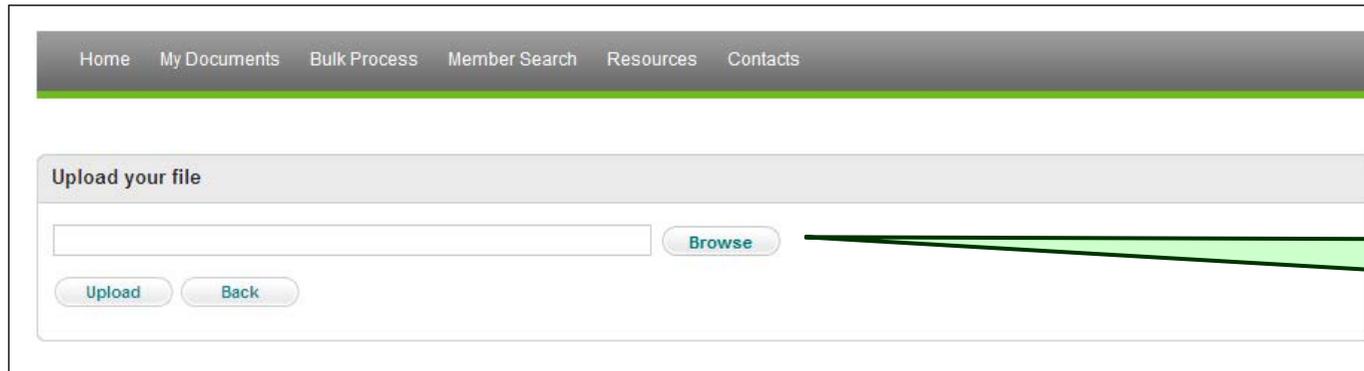
To upload a document, click on **'Upload document'**

My Documents

The screenshot shows the 'My Documents' section of the Norfolk Pension Fund portal. At the top is a navigation bar with links for Home, My Documents, Bulk Process, Member Search, Resources, and Contacts. Below this, there are two sections: 'Latest documents from administrator' with a red notification icon, and 'Latest uploads by ANOTHER EMPLOYER'. At the bottom right of the main content area, there is a button labeled 'Upload document', which is highlighted with a dashed green box. A dotted line connects this button to the callout box on the right.



Uploading a document to the Norfolk Pension Fund



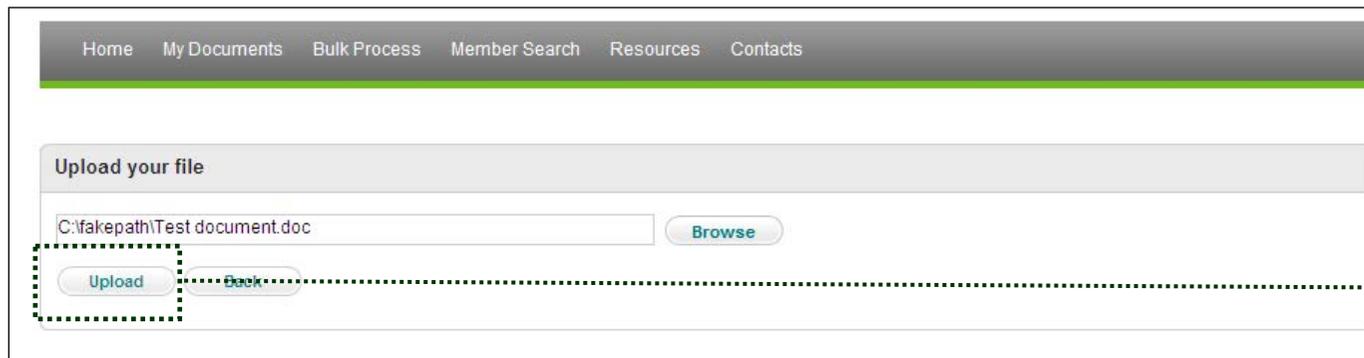
Home My Documents Bulk Process Member Search Resources Contacts

Upload your file

Browse

Upload Back

Click **'Browse'** to select the document you wish to upload.



Home My Documents Bulk Process Member Search Resources Contacts

Upload your file

C:\fakepath\Test document.doc Browse

Upload Back

When you have selected the document, notice the **'Name'** field will be completed, and click **'Upload'**.



My Documents

Can I see what documents I've uploaded?

You can see what you've uploaded by looking at 'My Documents' or 'Home'

Upload date	Uploaded by	File type	Document name	Employer	Downloaded by	Download date	Select
02/05/2014	I. Carriage	General Doc	Test document.doc	Another Employer	I. Carriage		<input type="checkbox"/>

My Documents

The 'Downloaded by' field and the 'Downloaded date' field will be completed when the file is downloaded.

Upload date	Uploaded by	Employer	File type	Document name	Downloaded by	Download date	Select	
18/02/2015	I. Carriage		Form	scheme form (L45).pdf	Member leaving	I. Carriage	Not available	<input type="checkbox"/>

Home

Recent documents uploaded can also be seen on the Home Page



How do I view scheme members' records?

Member Search

Select 'Member Search' from the grey banner across the top of the page

Home My Documents Bulk Process **Member Search** Resources Contacts

Enter details below to search for a member's record. You can use any of the criteria below for your search.

You can then select a "Form" to give us early notification of retirement, full leaving details, early retirement authorisation, details of maternity leave, etc.

If you want to tell us about a new joiner, a member's change of name, address or hours or a period of strike, then click on ["Bulk Processes"](#) above.

Search Criteria

Forenames	<input type="text"/>	Surname	<input type="text"/>
NI Number	<input type="text"/>	Postcode	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/>		

Member Search

The member search facility allows you to find individual scheme members.

Enter either the National Insurance Number or the Surname and click 'Search'

Results

Forenames	Surname	Date of birth	Postcode	NI Number	View Details	Forms
A	TEST	01/01/1900	AA1 1AA	AA123456A	View Details	Forms
A	TEST	01/01/1900	AA1 1AA	AA123456A	View Details	Forms

To see the data for the member, click 'View Details'. By following the links on the left you can see the member's pension details.



Where do I find Forms and user Guides?

Resources

These can be found on the 'Resources' page.

Home My Documents Bulk Process Member Search **Resources** Contacts

Here's where you will find copies of useful documents and forms.

Type	Name	Comments
Forms (32)		
Guides (19)		
Other publications (19)		

Clicking on each 'Type' will open up all documents under that heading.

Resources

Shows documents and Guides available for all employers to view/save/print etc.

They are in sub-sections:

- Forms
- Guides
- Newsletters
- Employer Events
- Other Publications

Guides (19)

	SR98 - Do I Really Want to Opt Out (issue 3 Mar 2014).pdf	Do I Really Want to Opt Out? (Notes for Employees)
	MISC125 - Payroll Guide to the 2014 Scheme (issue 3.0 Apr 2014).pdf	Payroll Guide from LGPSregs.org



Contacts

Where can I check,
add or update our
contacts?

Norfolk Pension Fund uses these details to contact you and your organisation so please **check them regularly and keep them up-to-date**



Contacts				
Name	Role	Telephone	Email	
G Email	Other	01603 111111	general.email@norfolk.gov.uk	view edit
G Email	Other	01603 111111	general.email@norfolk.gov.uk	view edit
G Email	Other	01603 111111	general.email@norfolk.gov.uk	view edit
G Email	Other	01603 111111	general.email@norfolk.gov.uk	view edit

[Add contact](#)

Contacts

The contacts screen will show all available contact names together with their direct line number and e-mail address.

Click '**View**' to see more details.

Click '**Edit**' to update or delete the contact details.

Click '**Add contact**' to set up a new contact.

A new contact can be set up either as:

- an Employer Online User (who will have an account and can log in to the Employer Portal) and receive Newsletters and communications
- OR
- as a contact with no access to the Employer Portal but who will receive Newsletters and communications.

Please see the "Create New Contact" process on the following pages for more information.



Checking and updating “Contacts”

Contacts

There are 6 ‘Role’ types available. You can only assign one contact to each role. Any further contacts should be listed as ‘Other’.

Pensions Liaison Officer – employer contact
Human Resources Officer – for HR queries
Financial Contact – for finance queries
Contributions Contact – for completing the annual Year End Returns/SR71’s scheme payovers/payroll queries
FRS17 Contact – for FRS17/IAS19 reporting etc
Chief Executive Officer – the head of your organisation

Other – for any further contacts

Home My Documents Bulk Process Member Search Resources **Contacts**

Edit contact

You can modify the contacts details in the form below, or delete the contact from your contact list.
Important: The contact will not be able to log into the employer portal after deletion.

Contact

Title *	Miss
Forename *	Isobel
Surname *	Carriage
Position	Pensions Systems Officer
Role	Other
Employer	NORFOLK COUNTY COUNCIL
Address 1 *	5th Floor Lawrence House
Address 2	5 St Andrews Hill
Address 3	NORWICH
Address 4	
Postcode *	NR2 1AD
Telephone	01603 222648
Fax	01603 495795
Email address	isobel.carriage@norfolk.gov.uk
PensionsWeb user?	Yes

Cancel Delete Update

Contacts

To **UPDATE** the contact information, amend the desired fields and click ‘**Update**’.

NB: Fields with an asterisk * are required fields and must be completed.

To **REMOVE** a contact, click ‘**Delete**’.



Adding a colleague to be a "Contact"

Home My Documents Bulk Process Member Search Resources Contacts

Add contact

Please enter the new contact's details. Tick the PensionsWeb user box to allow the contact to access the employer portal

Contact [view all >>](#)

Title *

Forename *

Surname *

Position

Role

Address 1 *

Address 2

Address 3

Address 4

Postcode *

Telephone

Fax

Email address *

PensionsWeb User?

Contacts

To **CREATE** a new contact, complete the relevant fields and click **'Add'**.

If the contact **does** need access to the Employer Portal and is to be set up as an Employer Online User, please tick **'PensionsWeb User'**. (See next page.)

If the contact **does not** need access to the Employer Portal, please leave the **'PensionsWeb User'** box unticked. The contact will receive Newsletters and general communications from Norfolk Pension Fund.

NB: Fields with an asterisk * are required fields and must be completed.



Adding a colleague as an “Employer Online User”

Home My Documents Bulk Process Member Search Resources Contacts Reports Content Management

Contact view all >>

Name	Halle Berry
Position	Clerk
Role	Pensions Liaison Officer
Employer	The Parish Council
Telephone	01234 567891
Fax	01234 567899
Email address	Theparishcouncil@guesswho.co.uk

What happens next?

In order to register your colleague as a pensionsWEB user, you need to provide a temporary password which they will use to access the site the first time they login.

Please ensure the temporary password is at least 8 characters long, contains an upper and a lower case letter, at least one number and a special character.

You must then provide the temporary password details to the contact.

Assign temporary password

Temporary password

Contacts

You have successfully set up a new Employer Online User. Please check to ensure the details you have input are correct.

Passwords

Now set a password for your colleague, remember it must be:

- 8 characters long
- Contain upper and lower case letters
- At least one number
- At least one special character

Click **‘Continue’**

NOTE: Now let your colleague know the temporary password

When the new user accesses the Employer Portal for the first time they will be prompted to create a new password.



What happens after I've set my colleague up as an Employer Online User?

The request to add a new Employer Online User will need to be authorised by the Norfolk Pension Fund.

Contact account confirmation

The contact account has been created.

What happens next?

The contact account request will be processed by the pension fund administrators

▶

The contact will receive an email from the administrators within 72 hours with details of how to log in for the first time

We may contact you to verify the new Employer Online Users' credentials



Bulk Processes

How do I use
Bulk
Processes?

Select 'Bulk Process'
from the grey
banner across the
top of the page.

**NB: Please use form
SR76A to tell us
about Bulk Strike
members.**

**Please do not use the
Service Breaks and
MAIN/50-50
Bulk spreadsheets at
this time.**

Each Bulk Process
has its own
spreadsheet.

Click
'[Find out more >](#)'
under the relevant
Bulk Process
(e.g. Joiners)...

Home My Documents **Bulk Process** Member Search Resources Contacts

Bulk processing overview

Use this area of the site to tell us about a new joiner, a member's change of name, address or hours, periods of strike, etc.

If you want to give us early notification of retirement, full leaving details, early retirement authorisation, details of maternity leave, etc., then click "Member Search" above and use the online forms.

Bulk processing steps

STEP 1 Collect new data → STEP 2 Upload data into pensionsWEB → STEP 3 pensionsWEB checks data quality and requests corrections → STEP 4 Data sent to administrators

Joiners
Provide details of joiners to the pension scheme.
[Find out more >](#)
[Upload now >](#)

Changes
Provide details of changes to members' pensions details.
[Find out more >](#)

Year End
Provide your year end file to the pension scheme
[Find out more >](#)
[Upload now >](#)

Bulk Processes Submit information in bulk to the Norfolk Pension Fund

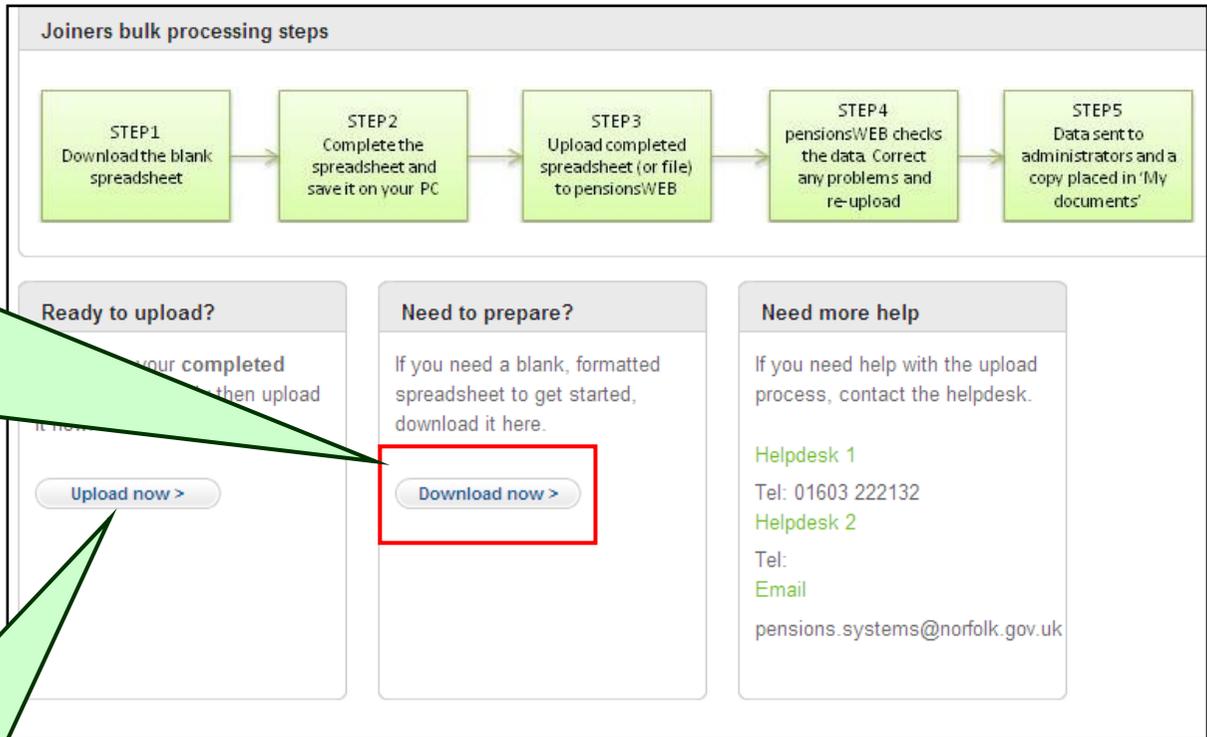
These can be used for:

- Joiners
- Hours Changes
- Name Changes
- Address Changes (under 'Changes')
- Annual Year End Return (refer to G090 – Year End Guide)



Uploading Bulk information to the Norfolk Pension Fund

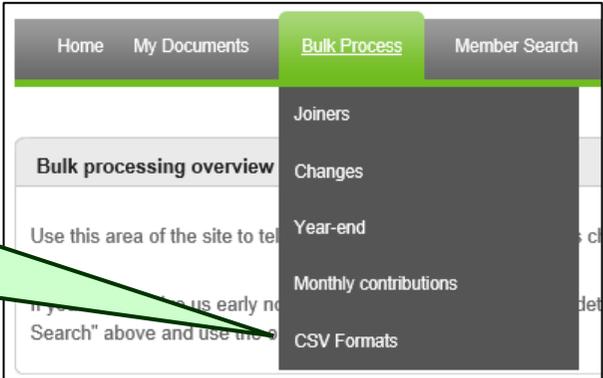
...and then click **'Download now >'** to download the blank ready-made spreadsheet for that Bulk Process. Save the spreadsheet to a secure location on your PC.



Once you have filled in the spreadsheet, click **'Upload now >'** under the relevant Bulk Process (e.g. Joiners).

NB: Please do not upload Bulk spreadsheets to 'My Documents' as the required validation checks will not be completed.

Alternatively, you can extract the data straight from your payroll system. It will need to be in the format specified under **'CSV Formats'**.



Uploading Bulk information to the Norfolk Pension Fund

Upload your file

Browse to the document you intend to upload

Click **'Browse'** to select the spreadsheet you wish to upload.

Once you have selected the spreadsheet click **'Upload'**.

This may take a few minutes to upload as your data is also being validated.

Upload Status

- Validating file
- File created successfully
- Uploading files
- Files uploaded successfully

File Uploaded

Your file has been successfully processed and uploaded.
The file contained 3 record(s).

What happens next?

Information will be processed by the pension fund administrators

Updated member information will appear on PensionsWEB within 72 hours

If your data has been validated successfully, you will get this message.

You will be able to see the files you have uploaded under **'My Documents'**.

If the spreadsheet cannot be validated then one of the screens on the following two pages will be shown.



Uploading Bulk information to the Norfolk Pension Fund

The first half of the Validation process checks the data in the uploaded spreadsheet to make sure no required fields are missing, and the data is in the correct format (e.g. no numbers in the Surname field, etc).

If there are no basic Validation errors, you will not see this screen.

Basic Validation Errors e.g. data missing or invalid

Option 1

If there are a large number of errors then you can download an **Error Report** to review and then fix the errors in your original spreadsheet.

Option 2

Review the errors in the table shown and fix the errors in your original spreadsheet.

Once the errors are fixed you can upload the revised file.

The screenshot shows a web interface for uploading bulk information. At the top, a message states: "The uploaded file contains errors". Below this, it says "3 of the 3 member records included errors that need to be fixed before the file can be uploaded successfully."

There are two main steps outlined:

- Step 1 - Review errors:** "Review the output in the table below or download the error report". A "Download Report" button is highlighted with a red box.
- Step 2 - Upload a revised file:** "Fix the errors in the spreadsheet before uploading. For small numbers of errors (less than 20) this is the preferred option." An "Upload Now" button is also present.

A "Validation Errors" table is shown below, listing the errors:

Line	Member	Error
1	Init Surname	NI Number must be provided and is missing.
2	Init Surname	Pension Reference must be provided and is missing.
3	Init Surname	Surname must be provided and is missing.

Below the table, there are navigation controls and a "What happens next?" section. The "What happens next?" section shows a flow: "Fix the errors in your file, using the error report to help you." (with a "Download Error Report" button) → "Upload a revised file" (with an "Upload Now" button highlighted in a red box) → "If you need help with the upload process call or email the helpdesk" (with contact information: Telephone: 01603 222132, Email: pensions.systems@norfolk.gov.uk).



Uploading Bulk information to the Norfolk Pension Fund

The second half of the Validation process checks the data in the uploaded spreadsheet against the data currently held by the Norfolk Pension Fund (e.g. is the NI Number correct, is the date joined correct, etc).

If there are no secondary Validation errors, you will not see this screen.

Data Queries

i.e. doesn't match NPF data, suspect date, etc

Option 1

You can download a **Report** to review the queries in your original spreadsheet and fix them if needed.

Option 2

Review the queries in the table shown and fix them in your original spreadsheet if needed.

The screenshot shows a validation screen with the following elements:

- Header:** "The uploaded file contains values that require confirmation"
- Message:** "3 of the 3 member records include data that may be wrong. Please review the case and decide if the data can be submitted or needs to be fixed."
- Option 1:** "Download the comparison report for review and fix the errors in the spreadsheet before uploading." with a "Download Report" button.
- Option 2:** "Review the output in the table below. If you are happy to proceed and upload the file with the errors intact, select the confirmation box to proceed." with an "Accept the errors and proceed" checkbox.
- Validation Errors Table:**

Line	Member	Error
1	Init Surname	'Date Joined Scheme' is more than one year in the past.
2	Init Surname	'Date Joined Scheme' is more than one year in the past.
3	Init Surname	'Date Joined Scheme' is more than one year in the past.
- What happens next?:** A flow diagram showing "Download Error Report" leading to "Upload a revised file" (with an "Upload Now" button) and then to a help contact box.

If you have reviewed the queries and are happy the data is correct, you can **tick this box** to accept the errors and upload.

If you have reviewed the queries and made some changes to the data, click **'Upload now'** to upload the revised spreadsheet.



Uploading Bulk information to the Norfolk Pension Fund

How to complete the **Bulk Joiners** spreadsheet.

Please complete the Line No for each member on the spreadsheet.
E.g. 1
2
3...

A	B	C	D	E	F	G	H	I
Line No	NI Number	Payroll Number	Surname	Forenames	Unused Column F	Job Title	Sex	Date of Birth
	9	Max 12 characters	Max 25 characters	Max 25 characters	Do Not Remove	Max 20 characters	1 character M - Male F - Female	10 characters DD/MM/YYYY
E.g.	AA123456C on line 2 - use	125 one line for each	SMITH member	MARY JANE	Anything In This Column Will Be Ignored	Clerical Assistant	F	01/12/1978
1								
2								
3								
4								
5								
6								

Please use capital letters.

Please leave this column blank.

Please do not use full stops.

J	K	L	M	N	O	P	Q	U	V
Date Joined Scheme 10 characters DD/MM/YYYY	Title	PT Indicator 1 Character W - whole-time P - part-time (Includes casual, no fixed hours, variable time employees)	PT Hours nn.nn	WT Hours nn.nn	FTE (Full Time Equivalent) Pay at Date Joined Scheme (Pre 2014 Definition, e.g excluding overtime)	Basic Contribution Rate 6.8	Address Line 1 Max 30 characters Home Address No commas	Address Line 5 Max 20 characters Home Address No commas	Post Code NR1 1DJ
01/12/1979	Mrs	P	32.50	37.00	14000.20		12 The Street	.	
3									
4									
5									

Please only use P (part time) or W (whole time).

If member is casual/irregular hours, please enter 00.01 in PT Hours and 37.00 in WT Hours. If the member works term-time please enter the term-time hours rather than contractual hours.

Please enter the Full Time Equivalent Pay. (Pre 2014 definition, e.g. not including overtime)



Uploading Bulk information to the Norfolk Pension Fund

How to complete the **Bulk Name Changes** spreadsheet.

A	B	C	D	E	F	G	H	I
Line No	NI Number	Payroll Number	OLD Surname	OLD Forenames	OLD Title	Surname	Forenames	Title
9	Max 12 characters	Max 25 characters	Max 25 characters	Max 25 characters	Max 25 characters	Max 25 characters	Max 25 characters	Max 25 characters
E.g. AA123456C on line 2 - use	125 one line for each	JONES member	MARY JANE	Miss	SMITH member	MARY JANE	Mrs	
1								
2								
3								
4								
5								
6								

Please complete the Line No for each member on the spreadsheet.
E.g. 1
2
3...

If unsure of the 'OLD' details, please check using the Employer Portal "Member Search".

Please do not use full stops in the 'Title' columns.

How to complete the **Bulk Address Changes** spreadsheet.

A	B	C	D	E	F	G	H	I	J	M
Line No	NI Number	Payroll Number	Surname	Forenames	OLD Address Line 1	OLD Post Code	Address Line 1 Home Address	Address Line 2	Address Line 3	Post Code
9	Max 12 characters	Max 25 characters	Max 25 characters	Max 25 characters	Home Address No commas Max 30 characters	Minimum 6	No commas Max 30 characters	No commas Max 30 characters	No commas Max 30 characters	Minimum 6
E.g. AA123456C	125	SMITH	MARY JANE	10 The Road	NR9 2AB	12 The Street	Any District	Somewhere	NR1 1DJ	
Start on Line 2 - use one line		each member								
1										
2										
3										
4										
5										

Please complete the Line No for each member on the spreadsheet.
E.g. 1
2
3...

If unsure of the 'OLD' details, please check using the Employer Portal "Member Search".



Uploading Bulk information to the Norfolk Pension Fund

How to complete the **Bulk Hours Changes** spreadsheet.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
Line No	NI Number	Payroll Number	Surname	Forenames	Effective date of Old P/T Hours Change	Old P/T Hours	Old W/T Hours	1st New PT Indicator	1st Effective date of Hours Change	1st NEW P/T Hours Parish Clerks, Returning Officers etc	1st NEW W/T Hours	2nd New PT Indicator	2nd NEW P/T Hours Parish Clerks, Returning Officers etc	2nd NEW W/T Hours	2nd Effective date of Hours Change
E.g. 1	e.g. AA123456C Start on line 2 - use	Max 12 characters 125 one line for each	Max 25 characters SMITH	Max 25 characters MARY JANE	01/02/2011 DD/MM/YYYY	27.50 If WT, then should = WT hours	37.00	W - whole-time P - part-time (Includes casual, no fixed hours, variable time employees)	01/02/2011 DD/MM/YYYY	32.50 If WT, then should = WT hours	39.00	W - whole-time P - part-time (Includes casual, no fixed hours, variable time employees) P	32.75 If WT, then should = WT hours	39.00	01/03/2011 DD/MM/YYYY
2															
3															
4															
5															

Please complete the Line No for each member on the spreadsheet.

E.g. 1
2
3...

If unsure of the 'OLD' details, please check using the Employer Portal "Member Search".

Please only use P (part time) or W (whole time). If the member works term-time please enter the term-time hours rather than contractual hours.

Use the last four orange columns if the member has had two hours changes.



Member Search

How do I use
Online Forms?

Select 'Member Search' from the grey banner across the top of the page.

Home My Documents Bulk Processes **Member Search** Resources Contacts

Enter details below to search for a member's record. You can use any of the criteria below for your search.
You can then select a "Form" to give us early notification of retirement, full leaving details, early retirement authorisation, details of maternity leave, etc.
If you want to tell us about a new joiner, a member's change of name, address or hours or a period of strike, then click on "[Bulk Processes](#)" above.

Search Criteria

Forenames	<input type="text"/>	Surname	<input type="text" value="test"/>
NI Number	<input type="text"/>	Postcode	<input type="text"/>
Date of birth (dd/mm/yyyy)	<input type="text"/>		

Results

Forenames	Surname	Date of birth	Postcode	NI Number	View Details	Forms
					View Details	Forms

Online Forms

'Submit Online Forms to the Norfolk Pension Fund'

Enter the member's details and click '[Search](#)'.

Under '**Results**' look for the relevant member and click '[Forms](#)' to see the list of available forms.



Submitting Online Forms to the Norfolk Pension Fund

Select the form you would like to submit from the list shown.

Online Forms

Please Choose the form you wish to submit.

- Estimate of benefits form (MISC89)
- Retirement Discretions (R16)
- Advance Warning of Retirement (R25)
- Notification of unpaid leave of absence Form (SR47B)
- Member leaving scheme form (L45)
- Auto Move to Main Section Form 50/50 Section (SR106)
- Change of Contractual Hours (SR47C)
- Secure Message Form

Complete the necessary fields.

Mandatory fields will be highlighted in **red**.

When the form is completed, click '**Submit**'.

Parts of the form will be pre-populated using the data held by Norfolk Pension Fund.

Unpaid (Maternity etc) leave form (SR47B/SR75)

Member details		Address	
Full Name	Name	Address Line 1	Address Line 2
NI Number	AA123456A	Address Line 3	Address Line 4
Date of Birth	01/01/1900	Address Line 5	Postcode

Employer	ANOTHER EMPLOYER
Payroll Reference	123456
*Fields highlighted in red	

Notification of unpaid leave of absence

Type of leave

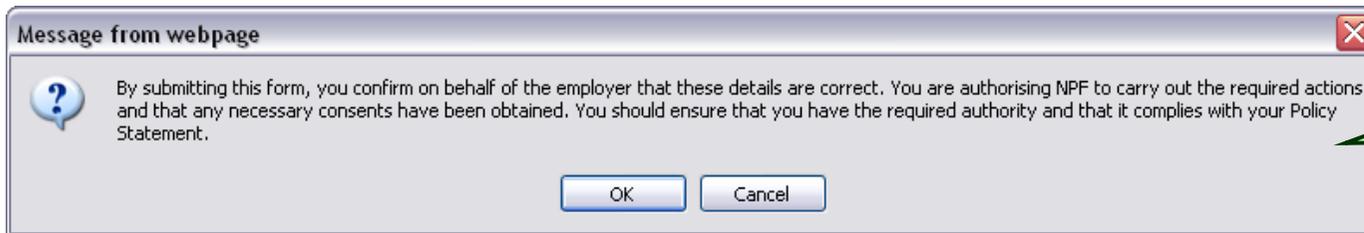
Date "Unpaid Period" commenced

Date unpaid ceased

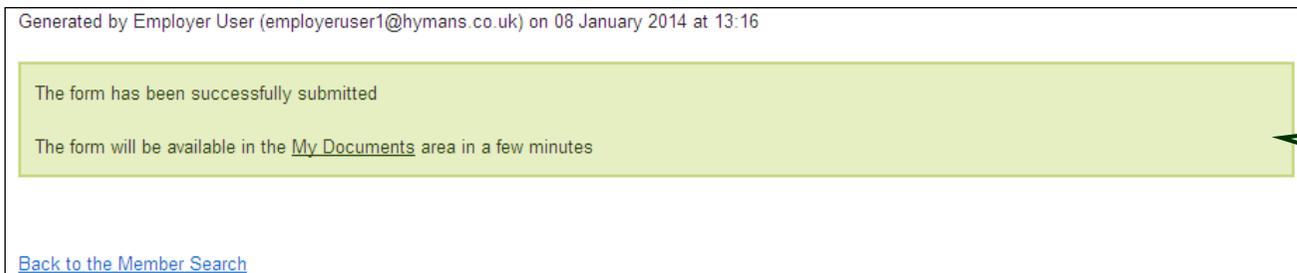
Opted to pay contributions for unpaid period Yes No



Submitting Online Forms to the Norfolk Pension Fund

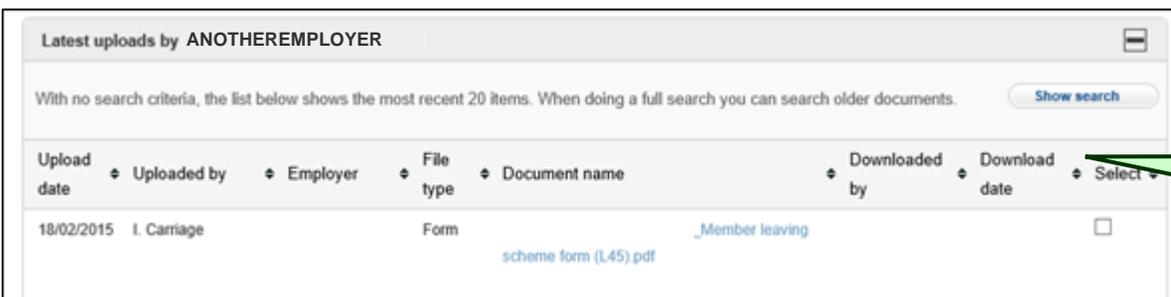


Click **'OK'** to confirm that you want to submit the form to Norfolk Pension Fund.



Confirmation will appear showing the form has been successfully submitted.

Click **'My Documents'** to see the submitted form, or **'Back to Member Search'**.



Under **'My Documents'**, the submitted form will appear after a few minutes as a PDF file. Status will change from **'Pending'** to **'Processed'** when it has been downloaded by Norfolk Pension Fund.



If I have
problems,
who do I
contact?

Norfolk Pension Fund Employer Portal

Technical Services Team

Tel: (01603) 222132

Email: pensions.systems@norfolk.gov.uk

