

ERPF Monthly Data Collection - Common Issues

Uploading the file:

If the upload errors before moving to the Stage 2 validations, it is likely to be something on the template spreadsheet.

Ensure the file has been saved as a CSV (Comma delimited) (*.csv). Also check heading line is the same as the template provided.

Please recheck all the data is in the correct format, i.e. dates 00/00/0000, information is in the correct column. If all this is correct but the file will still not upload, please remove the heading line and retry. If an issue still occurs, load the data onto a new blank template and resave, then reupload.

If an issue is still occurring please contact Comms@erpf.gov.uk

Avoiding Missing Member requests:

Any leavers must have an indicator in column BI.

Casual employees with no earnings for the month MUST still be included on the upload with zero figures in the contribution and Main Section/50-50 fields. If the member is still in the scheme but no line is received a missing member request will be sent to you to establish why the line was missing.

Folder references:

Each line must have a unique folder reference and duplicate numbers will error the upload. The only exception is where the line is indicated as a joiner so the folder ref can be input as 0. Once the folder has been built from the joiner information the new folder reference for your following months upload will be sent to you as a document on the employer portal called Folder References for MDC New Joiners.

Joiners:

Columns J AS AT and AW to BA must be completed for all joiners. A 'Y' indicator should also be input in column BH. The folder reference for joiner lines must be zero.

Column AR should not be completed if the member is showing as a Joiner. Any hours change within the first month of joining must be informed on the following months upload.

Transfers of Post:

If an employee transfers to a new position within your employment, these shouldn't be indicated as a new joiner unless an additional record is needed. The original folder reference can be used and the monthly line should show the Pensionable pay for the new position and any pay and contributions for the whole month, for both posts added together. A new payroll number can also be included on the line if applicable.

Change of employer with the same Multi Academy Trust:

If an employee moves from one employer to another within your Multi Academy Trust, we do not need a leaver or joiner indicator. You must complete the online form to advise us of the date of change and the new employer. The monthly contributions can be posted on the relevant employer's monthly upload until the date of change. Then on the new employer's upload thereafter. Once we have been notified, we will amend the employees record to show the new employer which will allow the upload to post correctly. Therefore, it is important that you complete the online form as soon as you know of a change of employer.

Leavers:

All lines, including any extra lines after you previously informed us the member has left, must have a leaver indicator as Y in column BI and a reason in column BJ.

The effective date for all leaver lines in column W must always be the date of leaving.

Flexible Retirements:

Where a member goes on flexible retirement, the new position must be added to the upload as a joiner.