CHESHIRE PENSION FUND

Employer Hub User Guide

June 2024

Contents

NEW HUB USERS:
ACTIVATING YOUR HUB ACCOUNT

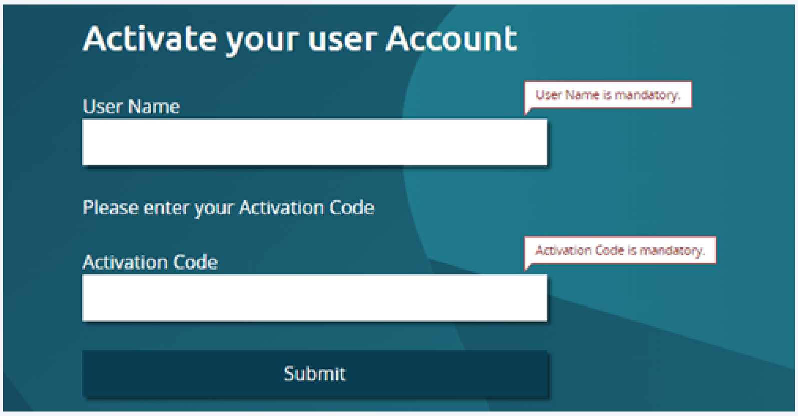
NEW USERS: You will need to complete and return a Web Access Request Form before you can access the Employer Hub. The form can be found on our website here [Employer Web Access Request Form](#).

PLEASE NOTE: Activation codes sent to the new user will expire within **10 calendar days** from the day it has been emailed. Once it expires, you will need to contact cheshirepfinbox@cheshirewestandchester.gov.uk so we can assist you in completing the set-up of the account.

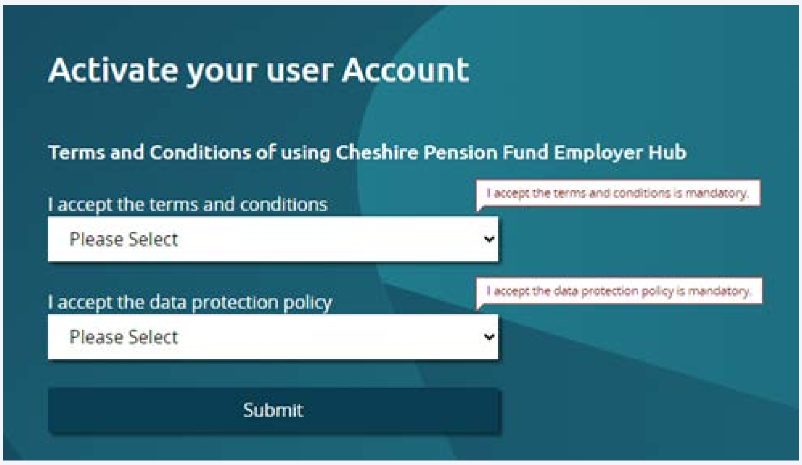
1. The first email you will receive will include your Username and the link to activate your account (https://www.cheshireemployerhub.org/activateuser.html)

2. A subsequent email will contain your Activation Code.

3. Enter the Username and Activation Code at the activation link:



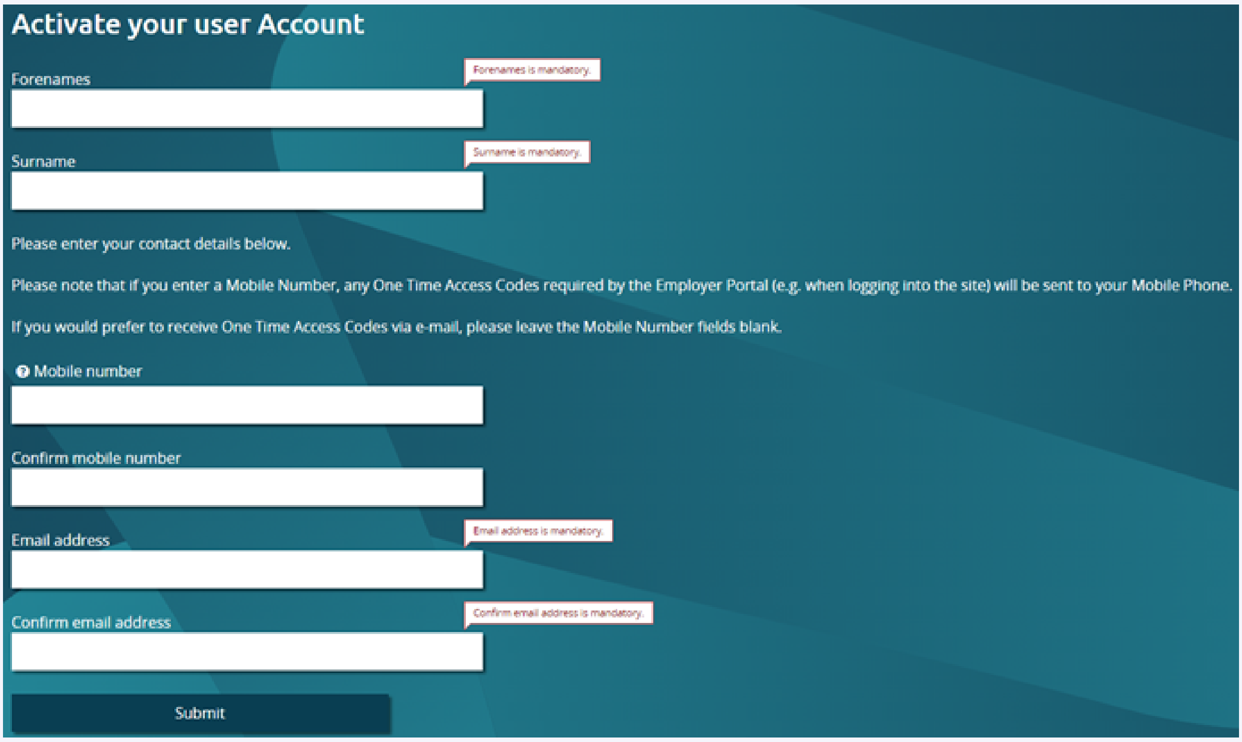
4. You will need to read through the Terms and Conditions and the Data Protection statement, accept the terms and then click 'Submit' at the bottom of the page:



5. Enter your telephone number and click ‘Submit’. The work phone number field is mandatory:

   PLEASE NOTE: We have changed the way you can log in. When you input a mobile number on this page, you will be able to receive your one-time code to your mobile phone instead of by email.

   If you would still like to receive your one-time code only to your email address, please **do not** input anything in the mobile number fields on this page.



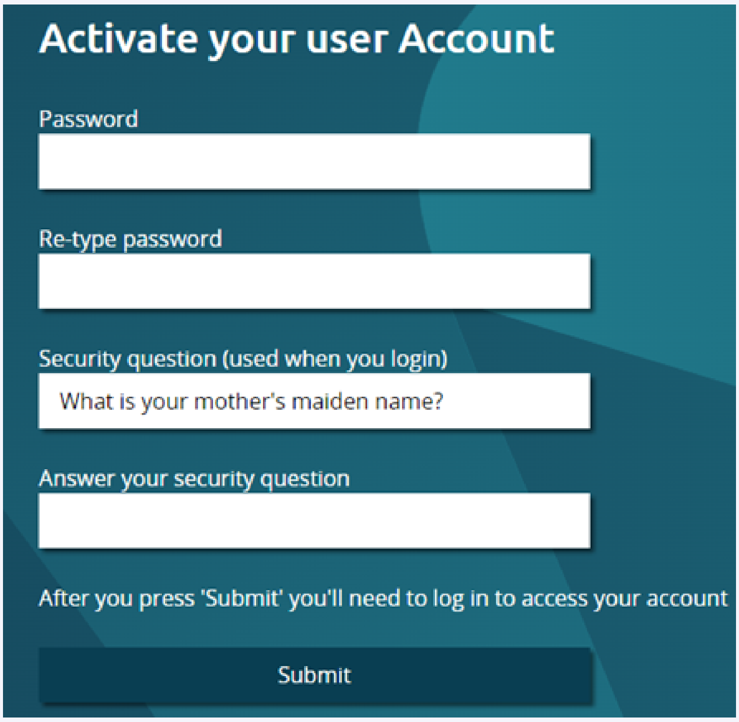
   When inputting a mobile number, please ensure it does not start with +44 or include any spaces.

   The Forename, Surname and Email Address fields are automatically completed on this screen. If you would like to change this information, you can action this after you have activated and logged into your account by clicking on the

   ‘Change My Account’ tile on your homepage.

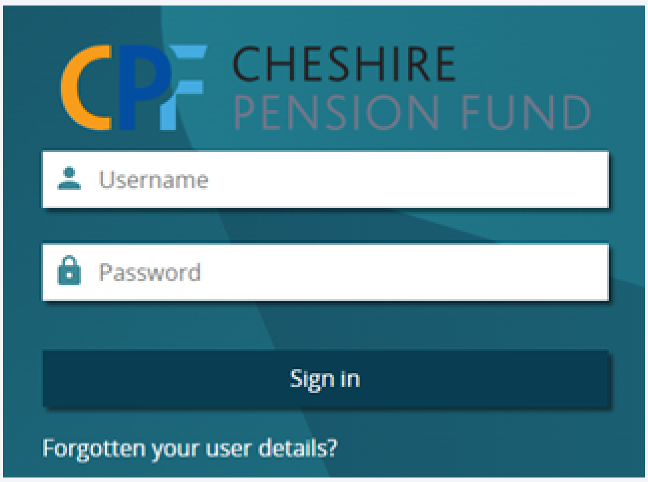
6. On the next screen, you will then need to choose your password. The password must be 15 characters long, and contain upper case, lower case and a number. It is highly recommended that this be made up of 3 completely unrelated words. Symbols can be used to make passwords even stronger.

7. You will also need to choose a main security question and answer, plus two further questions and answers (these security question and answers will be used when requesting a forgotten username or password from the system). Click 'Submit' at the bottom once completed:



PLEASE NOTE: once you have activated your account, you will need to wait at least 24 hours before you can log in, there will be a reminder of this in your activation code email.

8. You are then taken to the main login screen to enter your recently set up username and password. You will be asked to enter a One Time Code. This code has either been emailed to your email address or texted to your mobile number, depending on what you inputted when activating your Hub account. You will now have access to your Hub account.

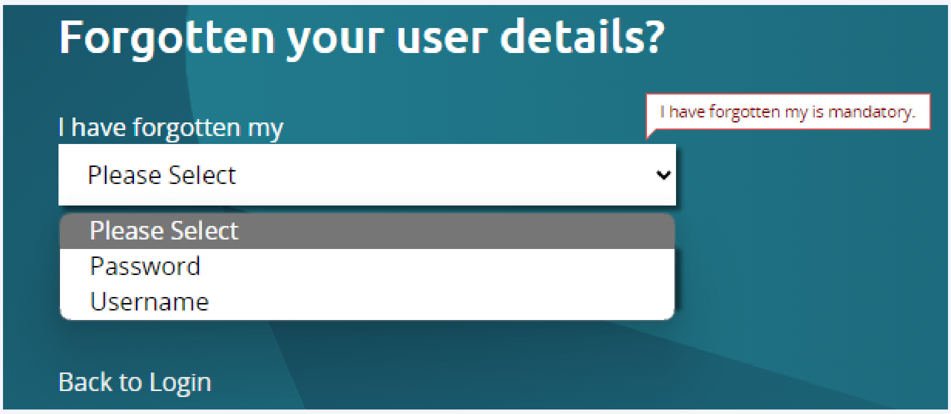


HOW TO LOGIN TO YOUR EMPLOYER HUB ACCOUNT

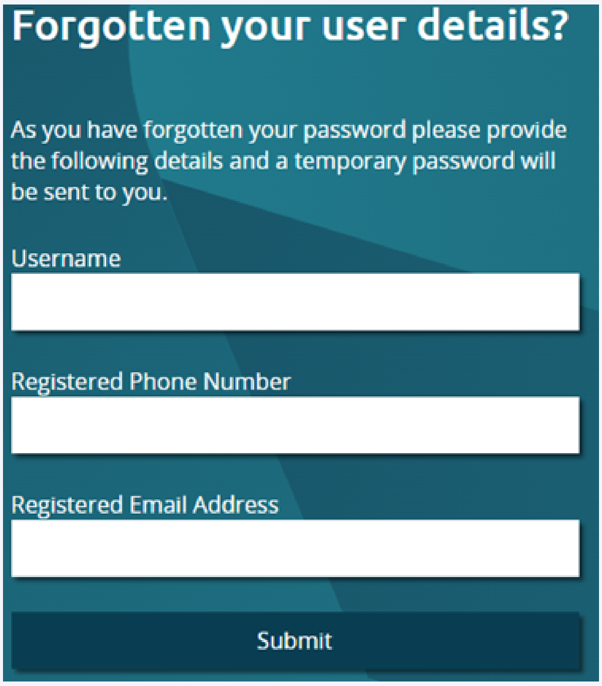
1. Go to https://www.cheshireemployerhub.org
2. Enter your Username (not case sensitive)
3. Enter your Password (case sensitive)
4. When prompted, enter the One Time Code which has either been emailed to your email address or texted to your mobile number, depending on what you selected when you activated your account.
5. Click 'Sign in'

HOW TO REQUEST YOUR FORGOTTEN LOGIN DETAILS

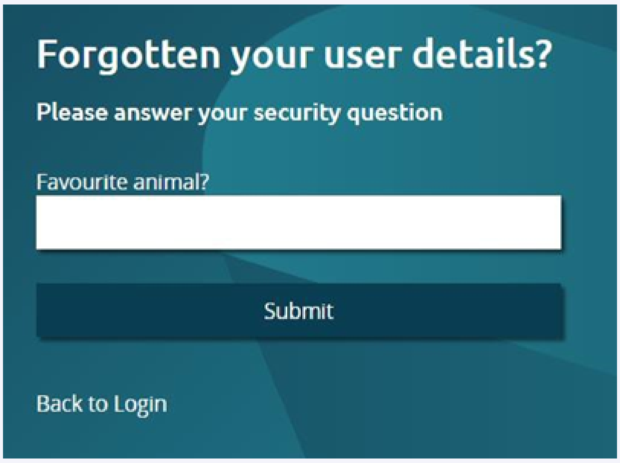
1. Click on 'Forgotten your user details?' link on the Hub login page
2. Select the appropriate option from the drop-down menu e.g. 'I have forgotten my... Password':



3. Follow the instructions when prompted e.g. when selecting forgotten password, it will ask you to provide the following information for a temporary password to be emailed to you:



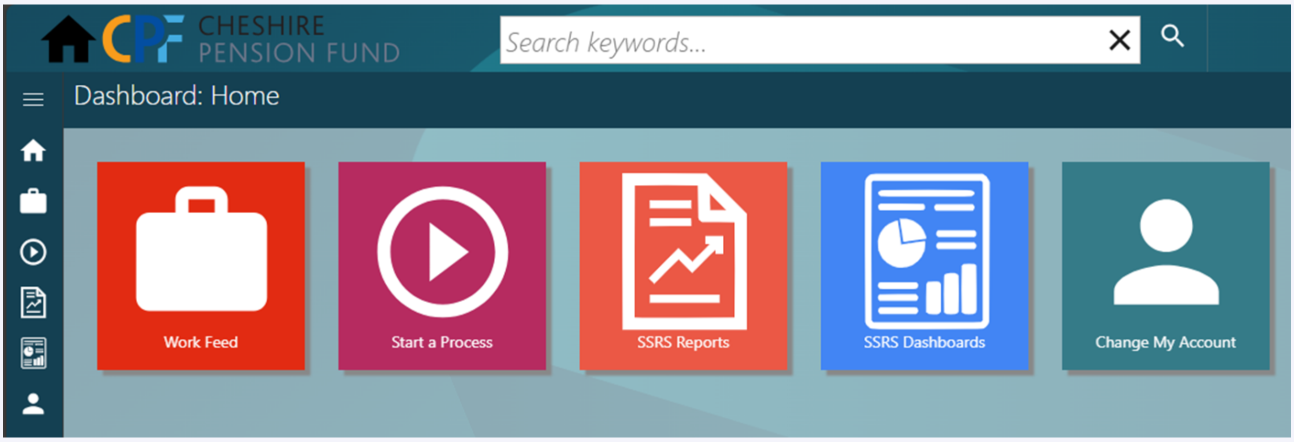
4. It will then request you enter your security answer **(case sensitive)**. Please note: your security question will be abbreviated to give you a hint at your answer (e.g. FIRSTPET, CHILDMIDDLENAME etc.)



NAVIGATION

HOW TO NAVIGATE YOUR 'DASHBOARD'

Your Dashboard acts as your homepage and contains four sections: 'Work Feed', 'Start a Process', 'SSRS Reports', 'SSRS Dashboards' and 'Change My Account'. You can navigate to each section by clicking on the icons as below:

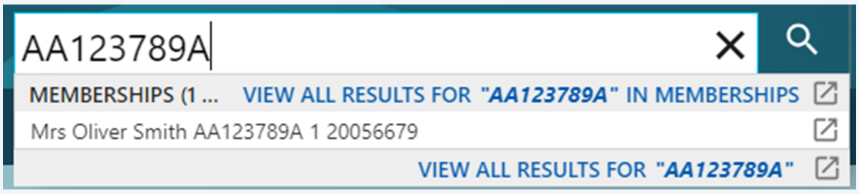


This menu on the left-hand side of the screen will show different options depending on which area of site you are in.

Please note that if you need to go back to your Dashboard at any point, you will need to click the top-left of the screen beside the search box where it displays the **home icon and CPF Logo**. When hovering over this, it will say 'Go to Home page':

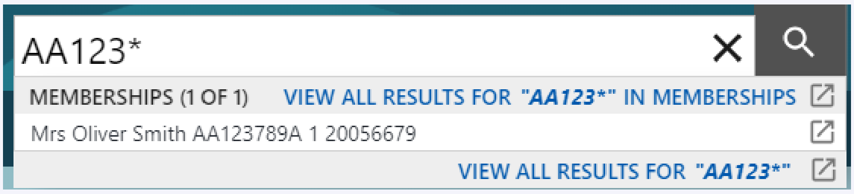
HOW TO SEARCH FOR A MEMBER (EMPLOYEE) AND VIEW THEIR DETAILS

1. In the ‘Search keywords…’ search box at the top of screen, type in the **National Insurance Number, Surname** or Membership Number (folder reference number) of the member (employee) and select “enter” on your keyboard (or select the search button to the right of the box):



2. It will show the results of the search below the box. Select the member you would like to view.

3. If you do not have the full National Insurance Number, you can type in part of the number and put an asterisk [*] before or after (depending on which part you are missing), and it will show the relevant search results:

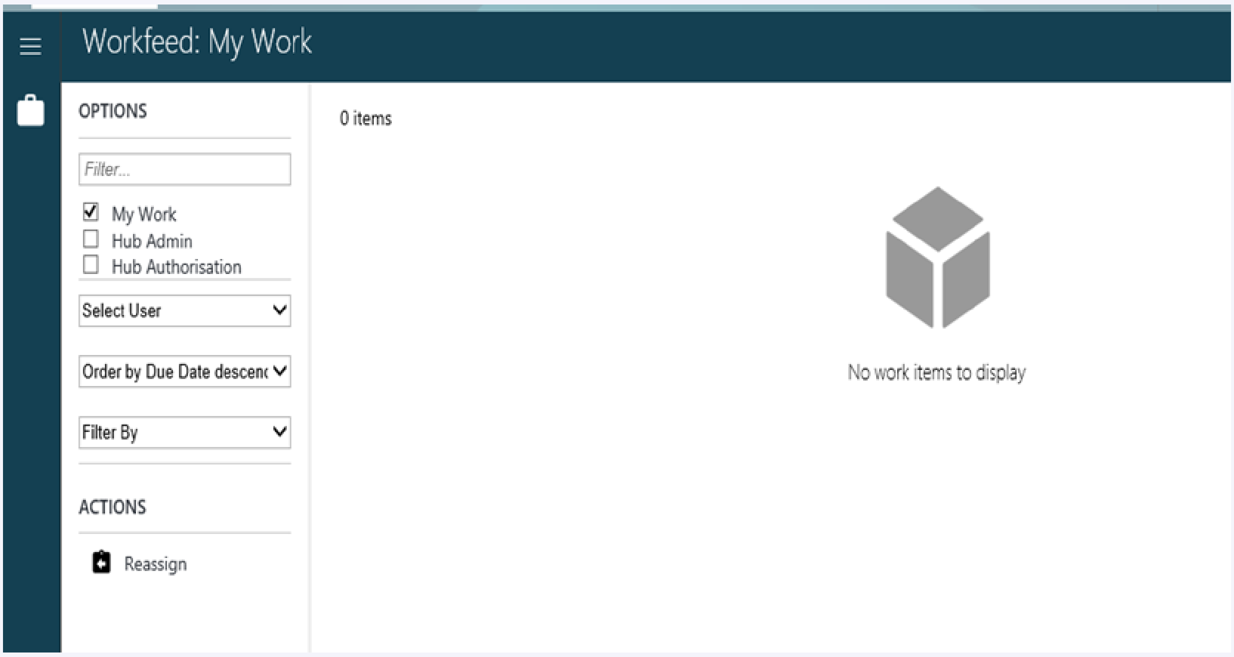


4. Once you have selected a member from the search results, you will then be able to view their personal details and pension folder details on a separate page:

HOW TO NAVIGATE AND ACTION ITEMS ON YOUR 'WORK FEED' (VIEW ONLY)

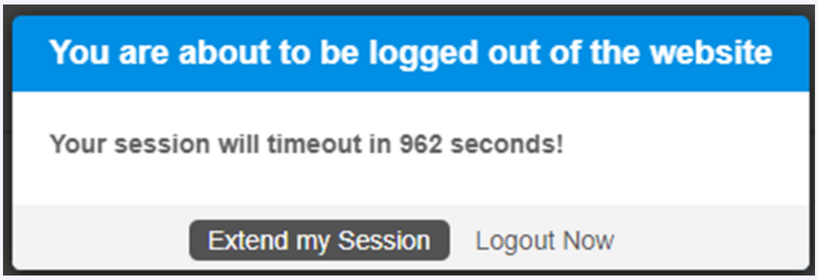
1. On your Dashboard, click on the 'Work Feed' icon:

2. The Work Feed screen appears, which shows what (if any) items are to be actioned on the right-hand side with the due date. The left-hand side of the screen has a few filters you can use to filter the items in your feed:

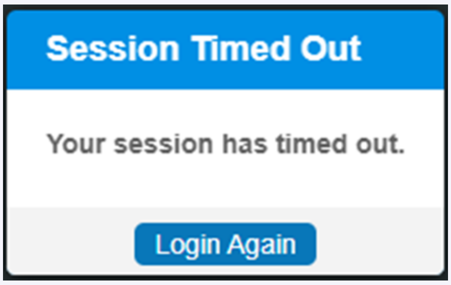


HOW TO EXTEND YOUR EMPLOYER HUB SESSION

1. A 'pop-up' box will appear when your Employer Hub session is near the time out limit. This box appears after 10 minutes of inactivity on your account. You can choose to either extend your session or log out of your session if you have finished your tasks:



2. If you do not respond within seconds stated on this message popping up, your session will then be automatically timed out and you will need to log back in again:



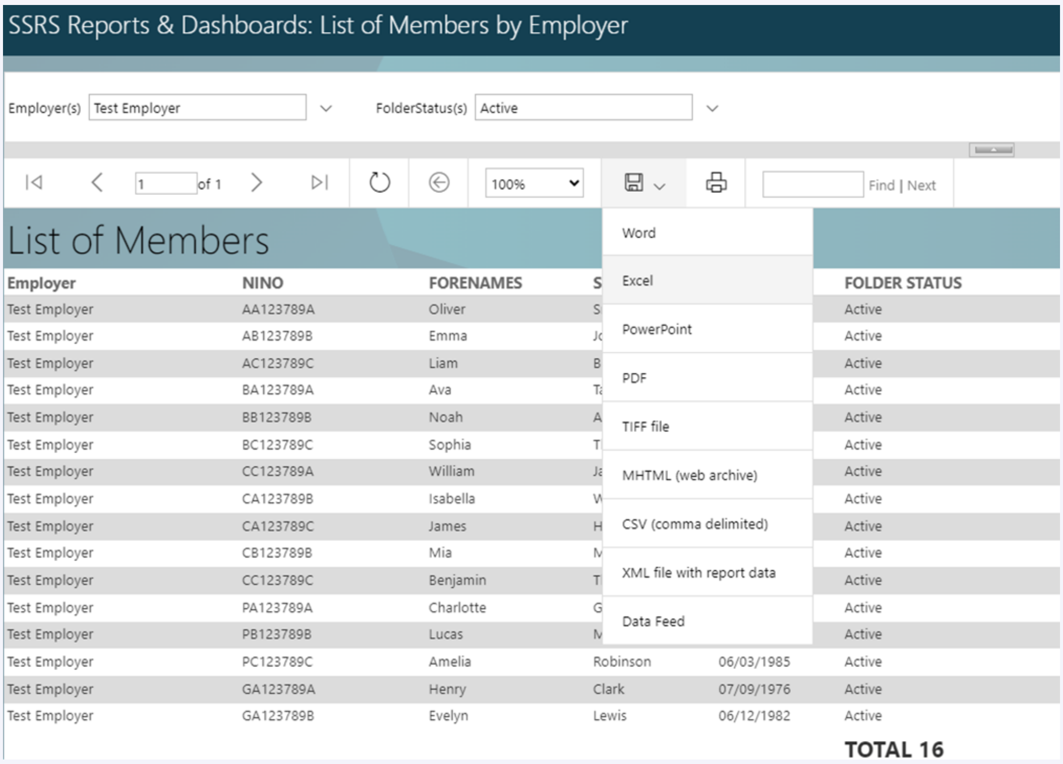
HOW TO RUN EMPLOYER REPORTS

1. On your Dashboard, click on the 'SSRS Reports' icon:

2. There is currently 1 report you can run:
   - **List of Members by Employer** – A list of your Active employees
   More reports are going to added in the future as they are developed.

3. Select the report you require by clicking on the corresponding tile. Make your selections in the report (for example, choose an employer or a folder status), and click on the 'View Report' button to generate your report.

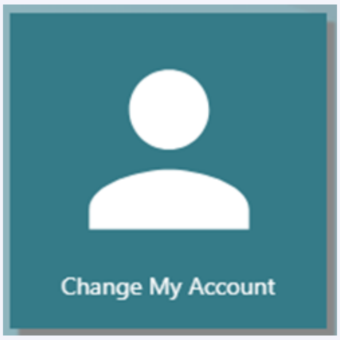
4. You can then export the report from the Hub to multiple file types and save a copy if you wish. You can also print the report from the Hub:



HOW TO CHANGE YOUR LOGIN DETAILS OR PERSONAL DETAILS

1. Login to your Hub account

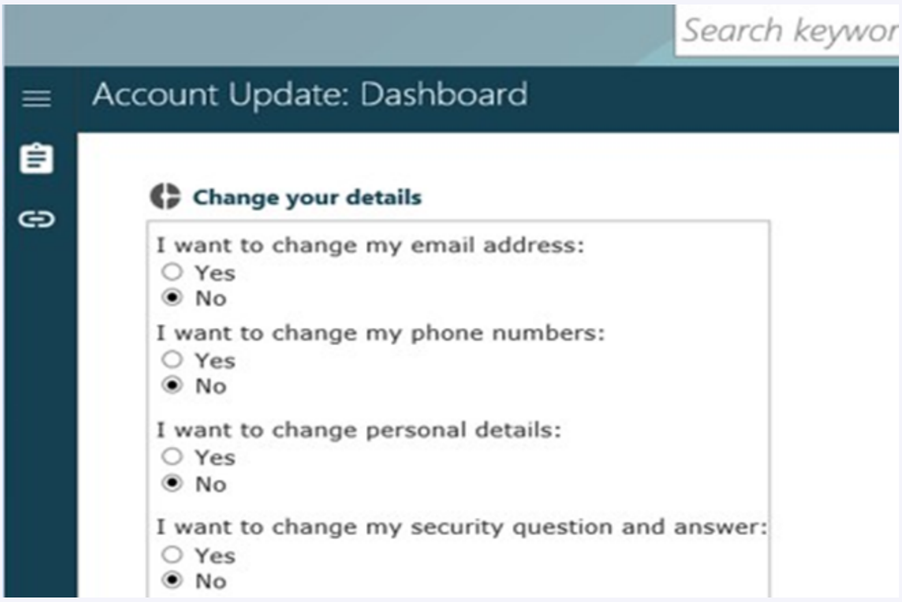
2. On the 'Dashboard: Home' page, click on the 'Change My Account' section:



3. Click on 'Change My User Details' for changing any one of following details:
   - Security question & answer
   - Email address
   - Phone number
   - Other personal details

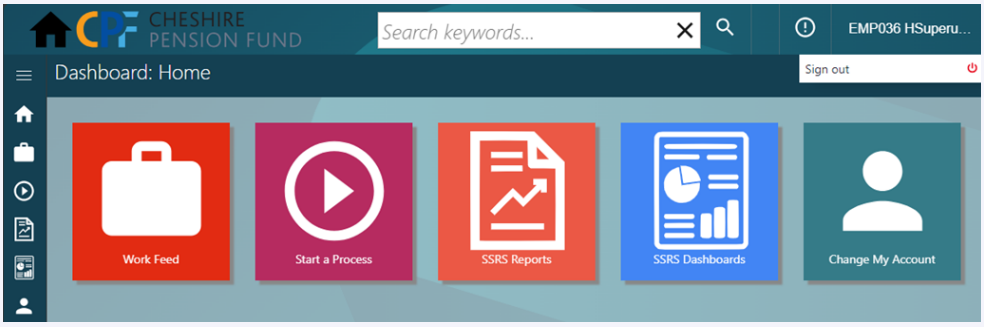
Or click on 'Change My Password' for change of password.

When you click on 'Change My User Details', you will need to select 'Yes' to any of the options that you would like to change and select 'Submit' and then follow the next instructions as prompted:



HOW TO SECURELY LOG OUT OF YOUR EMPLOYER HUB SESSION

1. Navigate to the top-right corner of your screen and click on the area where it says your username and then 'Sign Out':



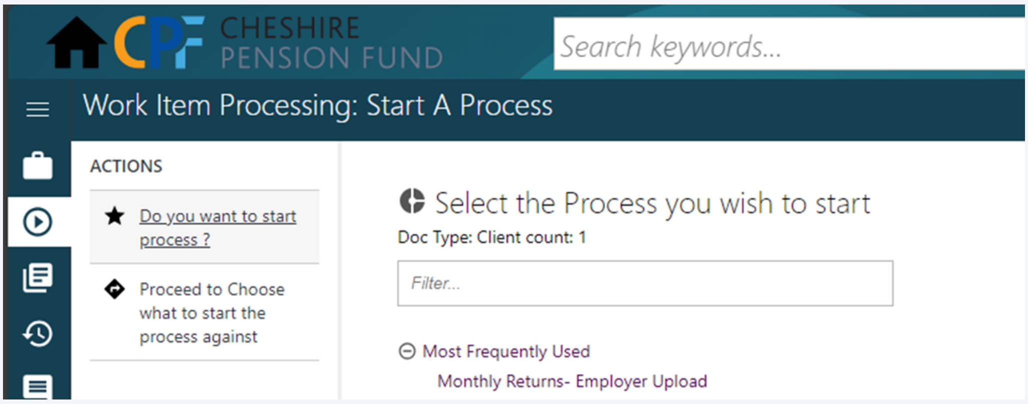
Your session will then end, and you will return to the login screen.

SUBMITTING YOUR MONTHLY INTERFACING FILE

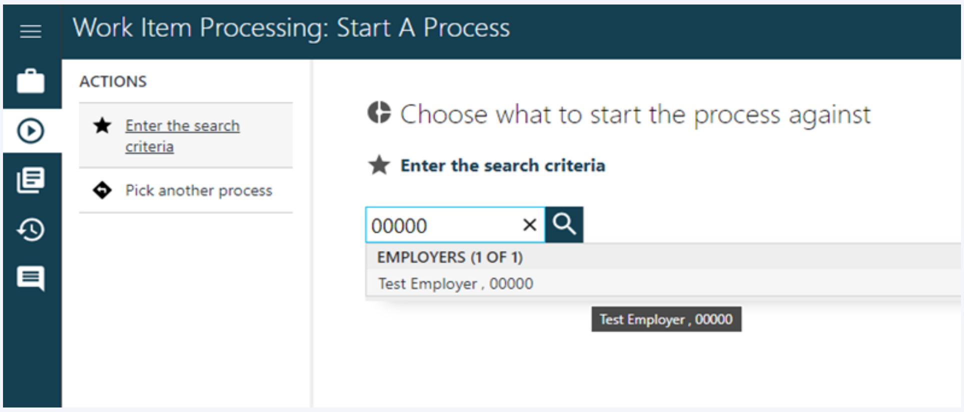
STARTING THE MI PROCESS

1. To start the Monthly Interfacing Upload process please click the 'Start a Process' tile on your Dashboard:

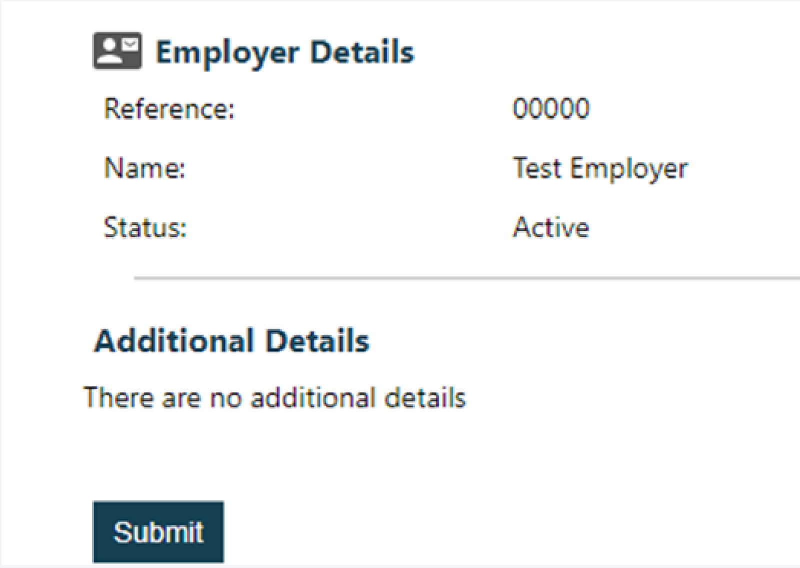
2. Once open then proceed to click 'Monthly Returns – Employer Upload'



3. In the search field; enter your 5 digit employer code you would like to start the process against.



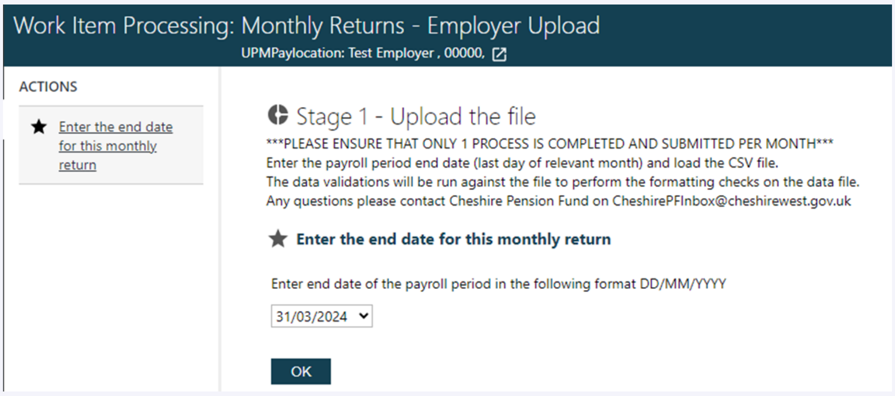
4. Proceed to Click the respective employer and enter the submit button as shown below:



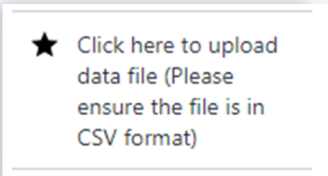
5. The process should then open automatically, if it does not open then simply go to the Work Feed and the process should be there for you to open.

STAGE 1 – UPLOADING THE MI CSV FILE

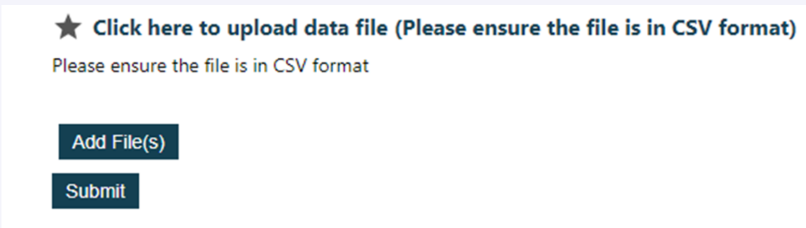
1. You will first be prompted to select the month of the file you are trying to upload. Here you need to select the month end date. E.g. 31/03/2024. Once selected press 'OK'



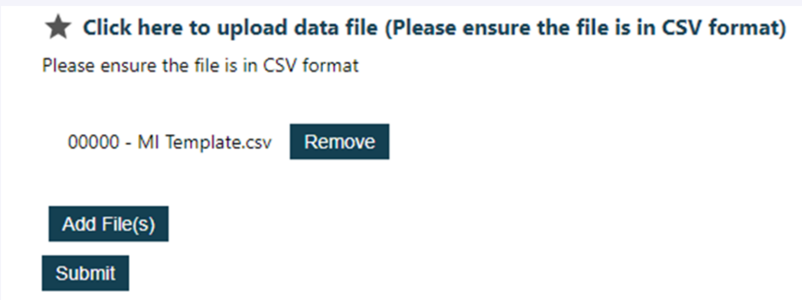
2. In the Actions section, click on the 'Click here to upload data file...' box and press Add



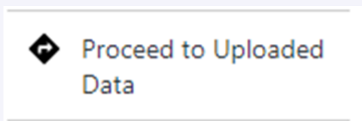
3. Add your MI file from your computer by clicking 'Add File(s)':



4. Once added click the submit button:

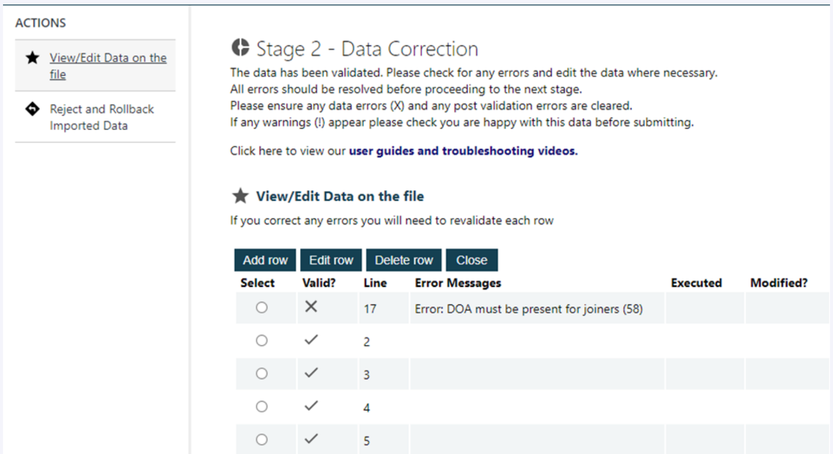


5. The size of the file may affect the time it takes to process the file (up to 10 minutes). Once complete click 'Proceed to Uploaded Data' as shown opposite:

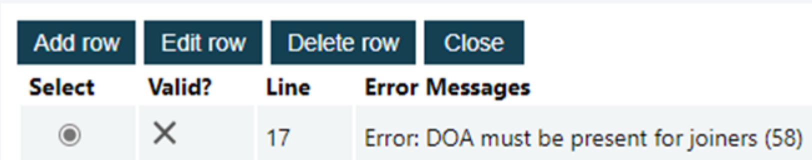


STAGE 2 – DATA CORRECTION

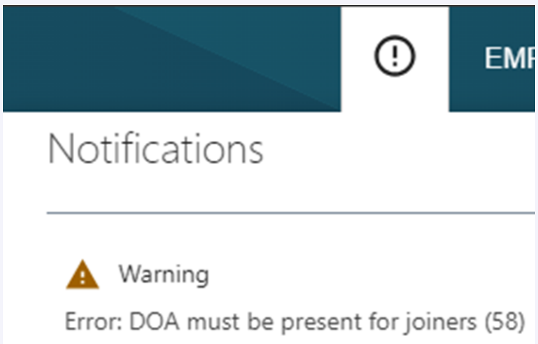
1. Any issues with the data will be displayed under Error Messages (below).



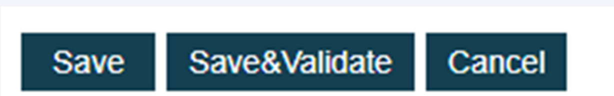
2. If you only have a small number of errors, amend them by clicking 'Edit Row' on each line item. **(When amending each line please do not amend the 'ID' number quoted in the first field when correcting errors)**.



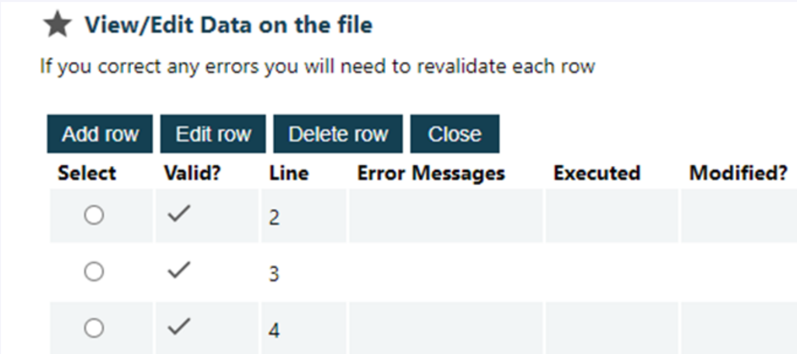
3. Once you open a line a notification will appear listing the data issues present:



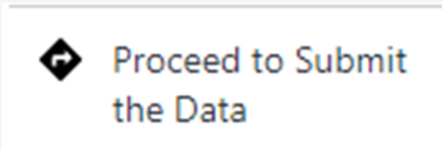
4. As you correct each line with error/s, scroll to the bottom and click 'Save & Validate'.



5. Repeat the above for all lines of data with errors. Once you have resolved all the errors, all rows should have a tick ✓. You'll then be able to submit the file. Press 'Close'.



6. Click 'Proceed to Submit the Data' in the Actions section.

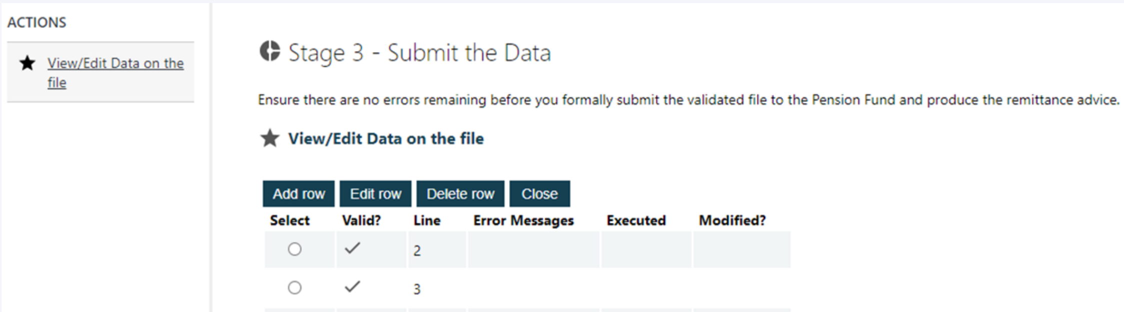


Please note: lines could be missing multiple fields which require completion. If you save and validate the line after resolving the initial errors stated, there may be additional errors as a result of the information you have provided. Please ensure these new errors are also corrected.

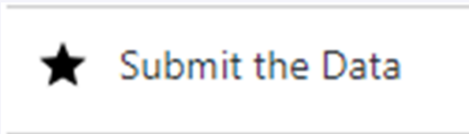
If you require further information regarding any of the errors for the various fields stated in the file, please refer to your MI Template under the Important Information sheet or the latest Monthly Interfacing Specification. Both can be obtained from our [MI Webpage](). If you require any additional information then please refer to the Contact Us section at the end of this guide.

STAGE 3 – SUBMIT THE DATA

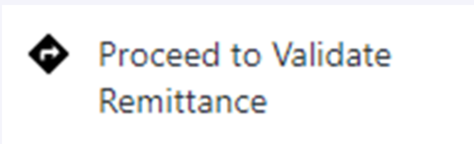
1. The following screen will appear again to ensure all errors have been cleared accordingly. If every line has a tick then click ‘Close’:



2. Click ‘Submit the Data’ in the Actions section.



3. Click ‘Proceed to Validate Remittance’ in the Actions section.



STAGE 4 – VALIDATING THE REMITTANCE ADVICE

1. Click 'Save and Validate the Remittance Advice…' in the Actions section.

★ Save and VALIDATE the Remittance Information (Edit Row, Save and Validate)

2. Select the row and then 'Edit' Row. If you have multiple rows to validate, you will need to do each of these individually.

★ **Save and VALIDATE the Remittance Information (Edit Row, Save and Validate)**

Add row | Edit row | Delete row | Close

Select	Valid?	Line	EMPLOYERNO	APCSEMPLOYEEREGULAR	APCSEMPLOYEELUMPSUM	APCSEMPLOYERREGULAR	APCSEMPLOYERLUMPSUM	ADDYRSCONTSUM
○	×		00000	0	0	0	0	0

3. Select 'Save&Validate' **(Please do not amend the 'ID' number quoted when validating the remittance line)**:

★ **Save and VALIDATE the Remittance Information (Edit Row, Save and Validate)**

ID

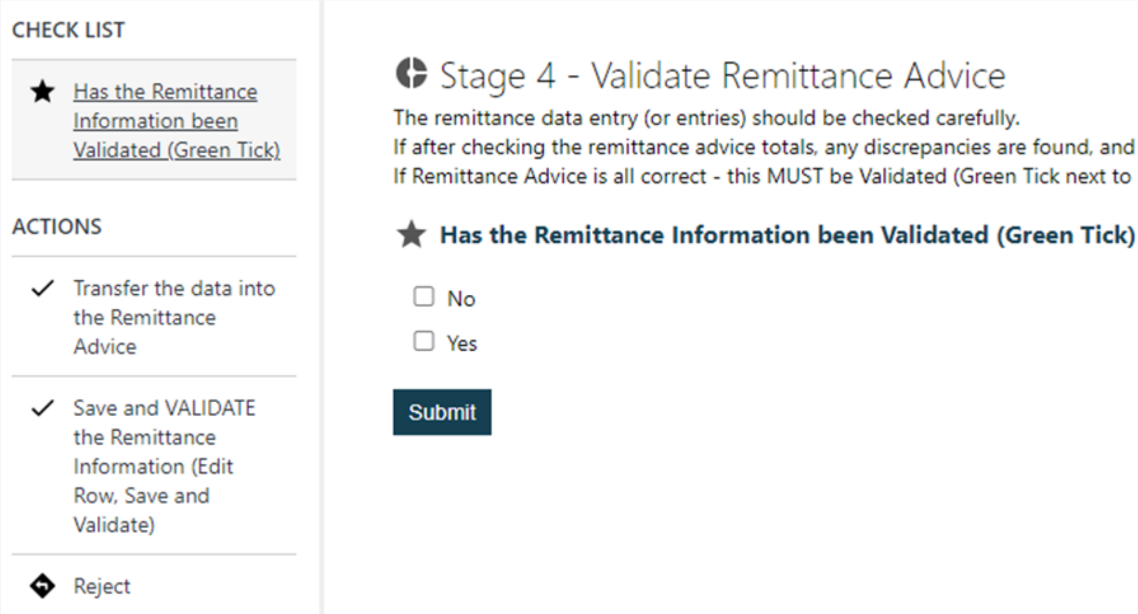
25651243

Save | Save&Validate | Cancel

4. Press 'Close'

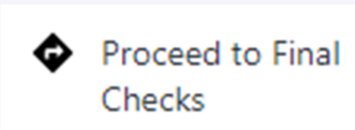
Select	Valid?	Line	EMPLOYERNO
○	✓		00000

5. From the Check list, select 'Have the Remittance Information been Validated'. The following options will pop up:



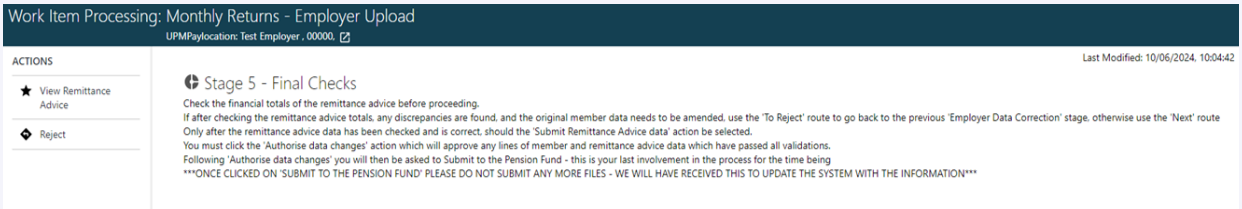
Select 'Yes' and click 'Submit'.

6. From the Actions click 'Proceed to Final Checks':

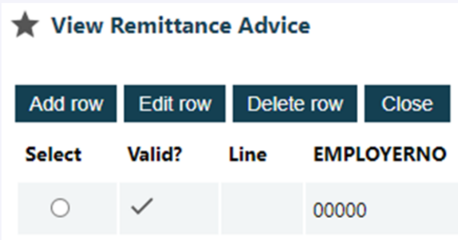


STAGE 5 – FINAL CHECKS

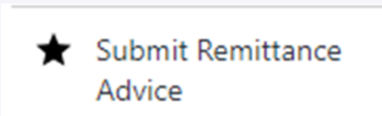
1. You'll be presented with the following screen. Here click 'View Remittance Advice' from the Actions section ensuring that all the lines are validated accordingly:



2. Select 'Close'

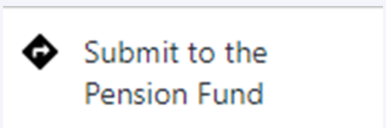


3. From the Actions select 'Submit Remittance Advice'



4. From the Actions select 'Authorise Data'

5. Click Submit to Pension Fund.



Your return will be submitted to CPF and you will be taken back to your Work feed.

CPF will now process your file. You will receive an automated confirmation once the file has been processed by CPF.

CONTACT US

Support is available Monday to Thursday 9am to 5pm & Fridays 9am to 4pm excluding Bank Holidays.

Email: CheshirePFinbox@cheshirewestandchester.gov.uk