

# Employer Hub User Guide

*June 2024*

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# 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](mailto: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:

The screenshot shows a form titled "Activate your user Account" on a teal background. It has two input fields: "User Name" and "Activation Code". The "User Name" field has a red error message that says "User Name is mandatory." The "Activation Code" field has a red error message that says "Activation Code is mandatory." Below the fields is a dark teal "Submit" button.

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:

The screenshot shows the same form as above, but now it includes a section titled "Terms and Conditions of using Cheshire Pension Fund Employer Hub". Below this title are two dropdown menus. The first is labeled "I accept the terms and conditions" and has a red error message "I accept the terms and conditions is mandatory." The second is labeled "I accept the data protection policy" and has a red error message "I accept the data protection policy is mandatory." Both dropdown menus currently show "Please Select". A "Submit" button is at the bottom.

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.

**Activate your user Account**

Forenames Forenames is mandatory.

Surname Surname is mandatory.

Please enter your contact details below.

Please note that if you enter a Mobile Number, any One Time Access Codes required by the Employer Portal (e.g. when logging into the site) will be sent to your Mobile Phone.

If you would prefer to receive One Time Access Codes via e-mail, please leave the Mobile Number fields blank.

Mobile number

Confirm mobile number

Email address Email address is mandatory.

Confirm email address Confirm email address is mandatory.

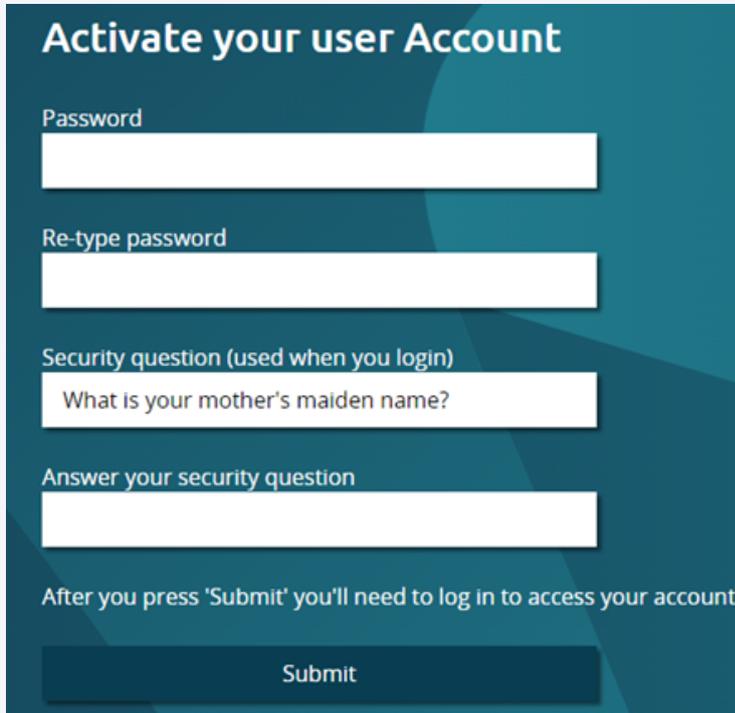
Submit

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:



The screenshot shows a teal background with the title "Activate your user Account" in white. Below the title are four white input fields with labels: "Password", "Re-type password", "Security question (used when you login)", and "Answer your security question". The security question field contains the text "What is your mother's maiden name?". Below the input fields is a line of text: "After you press 'Submit' you'll need to log in to access your account". At the bottom is a dark teal button with the text "Submit" in white.

**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.



The screenshot shows a teal background with the Cheshire Pension Fund logo (CPF) and the text "CHESHIRE PENSION FUND" in white. Below the logo are two white input fields with labels: "Username" and "Password". Below the input fields is a dark teal button with the text "Sign in" in white. At the bottom is a link that says "Forgotten your user details?" in white.

# 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':

**Forgotten your user details?**

I have forgotten my

I have forgotten my is mandatory.

Please Select

Please Select

Password

Username

Back to Login

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:

**Forgotten your user details?**

As you have forgotten your password please provide the following details and a temporary password will be sent to you.

Username

Registered Phone Number

Registered Email Address

[Submit](#)

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.)

**Forgotten your user details?**

Please answer your security question

Favourite animal?

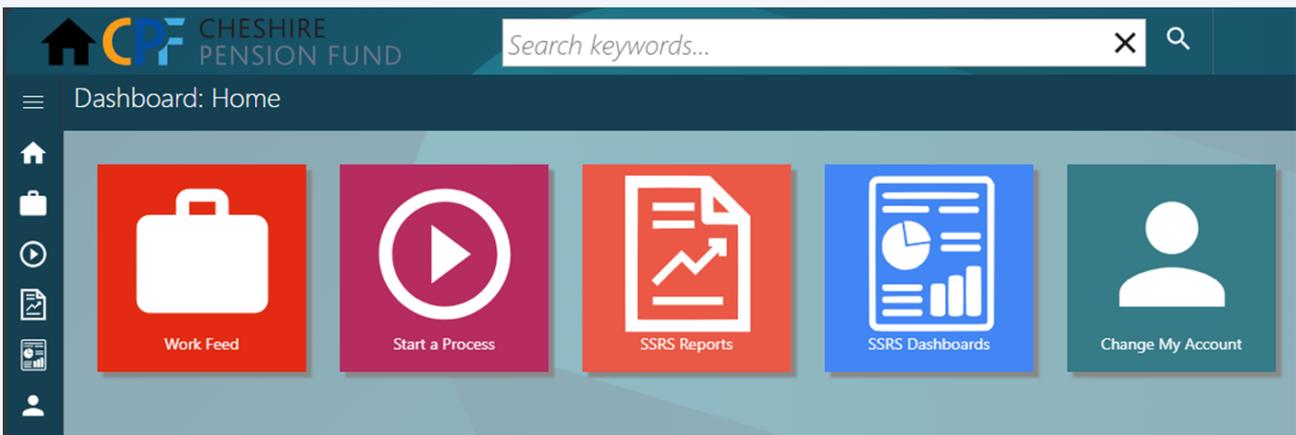
[Submit](#)

[Back to Login](#)

# 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:



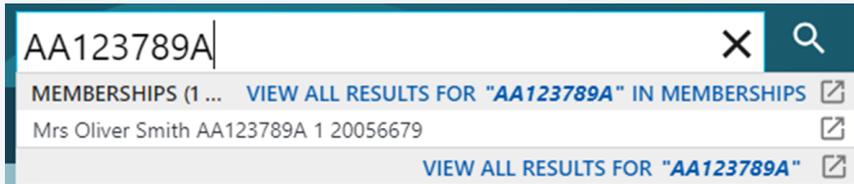
This menu on the left-hand side of the screen will show different options depending on which area of site you are in.

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':

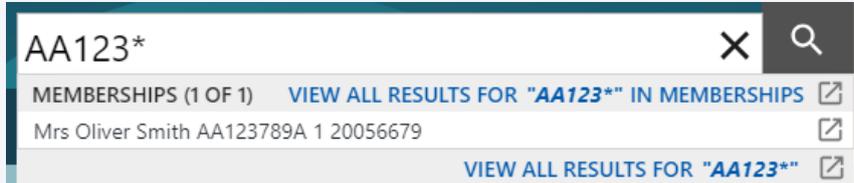


# HOW TO SEARCH FOR A MEMBER (EMPLOYEE) AND VIEW THEIR DETAILS

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:



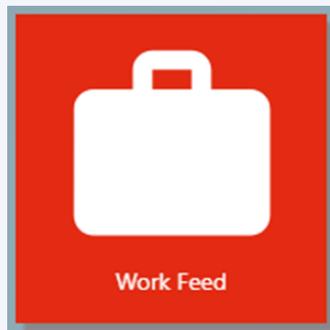
4. Once you have selected a member from the search results, you will then be able to view their personal details and pension folder details on a separate page:

Membership Details: Mrs Oliver Smith AA123789A 1 20056679

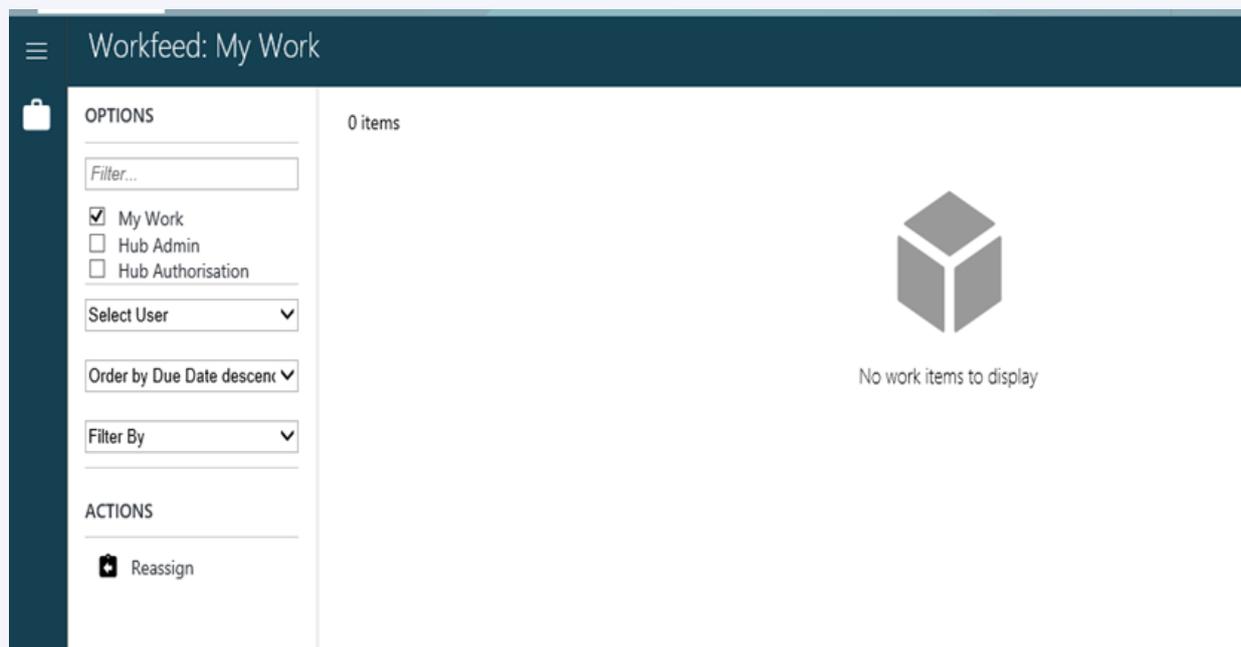
ACTIONS	Basic Details	Folder Details
★ View Member History	<p><b>Basic Details</b></p> <p>Full Name: Mrs Oliver Smith</p> <p>Gender: Female</p> <p>Date of Birth: 20/02/1989 (35 Years)</p> <p>National Insurance Number: AA123789A</p> <p>State Retirement Date: 20/02/2057</p> <p>Communication: Letter</p> <p>🏠 123 Maple Street, Apt 4B, Greenview District, Westfield Town, Berkshire, United Kingdom, AB1 2CD</p> <p>✉ null</p>	<p><b>Folder Details</b></p> <p>Membership Number: 20056679</p> <p>Status: Active</p> <p>Company Name: The LG Pension Fund (PF)</p> <p>Employer Name: Test Employer</p> <p>Date Joined Employer: 01/10/2021</p> <p>Scheme Retirement Date: 19/02/2054</p> <p>Impossible Case: No</p>

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

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

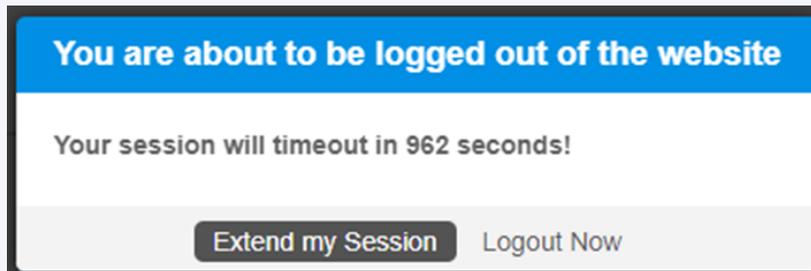


2. The Work Feed screen appears, which shows what (if any) items are to be actioned on the right-hand side with the due date. The left-hand side of the screen has a few filters you can use to filter the items in your feed:

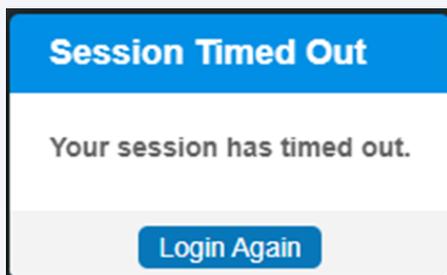


# HOW TO EXTEND YOUR EMPLOYER HUB SESSION

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 be 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:

SSRS Reports & Dashboards: List of Members by Employer

Employer(s)  FolderStatus(s)

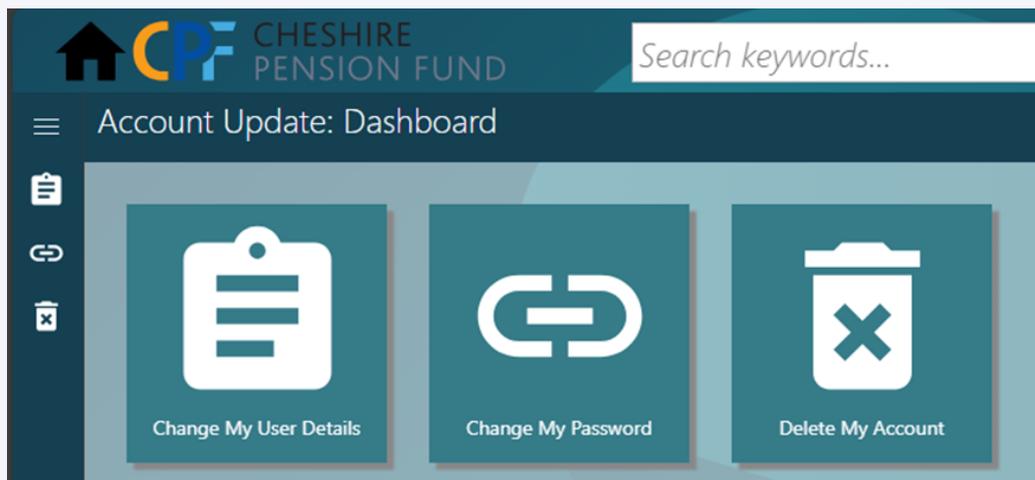
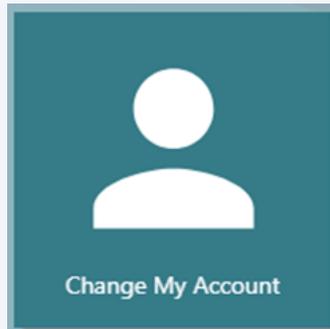
1 of 1 100% Find | Next

Employer	NINO	FORENAMES	S	Word	FOLDER STATUS	
Test Employer	AA123789A	Oliver	S	Excel	Active	
Test Employer	AB123789B	Emma	Jc	PowerPoint	Active	
Test Employer	AC123789C	Liam	B	PDF	Active	
Test Employer	BA123789A	Ava	T	TIFF file	Active	
Test Employer	BB123789B	Noah	A	MHTML (web archive)	Active	
Test Employer	BC123789C	Sophia	T	CSV (comma delimited)	Active	
Test Employer	CC123789A	William	J	XML file with report data	Active	
Test Employer	CA123789B	Isabella	W	Data Feed	Active	
Test Employer	CA123789C	James	H	Robinson	06/03/1985	Active
Test Employer	CB123789B	Mia	N	Clark	07/09/1976	Active
Test Employer	CC123789C	Benjamin	T	Lewis	06/12/1982	Active
Test Employer	PA123789A	Charlotte	G			Active
Test Employer	PB123789B	Lucas	N			Active
Test Employer	PC123789C	Amelia	R			Active
Test Employer	GA123789A	Henry	C			Active
Test Employer	GA123789B	Evelyn	L			Active

**TOTAL 16**

# HOW TO CHANGE YOUR LOGIN DETAILS OR PERSONAL DETAILS

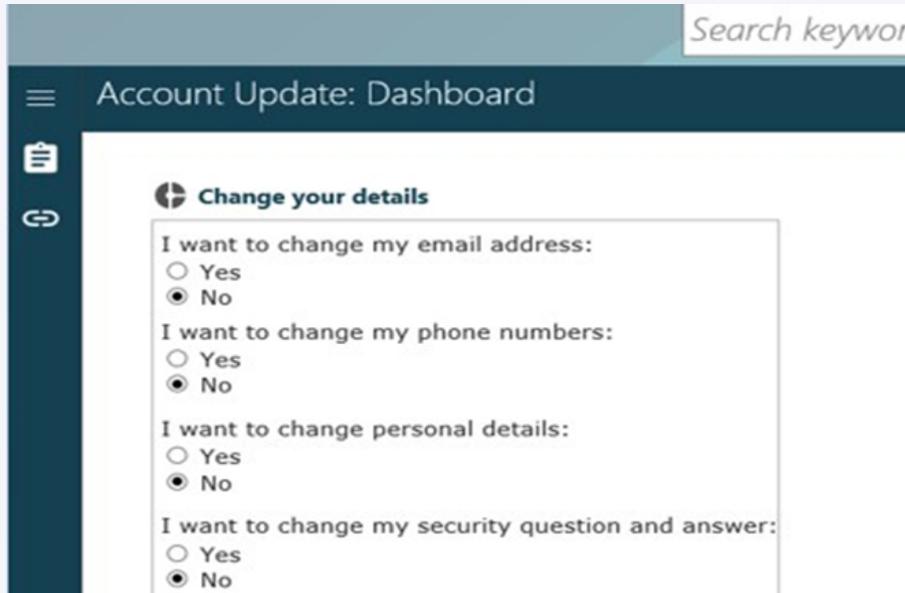
1. Login to your Hub account
2. On the 'Dashboard: Home' page, click on the 'Change My Account' section:



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

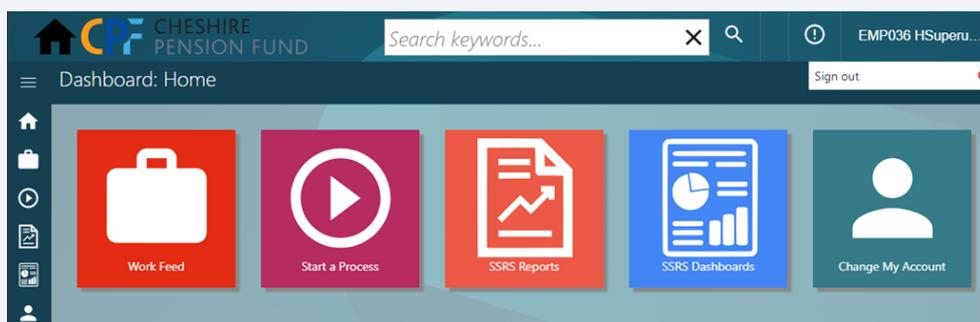
Or click on 'Change My Password' for change of password.

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':

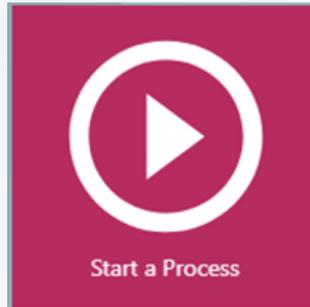


Your session will then end, and you will return to the login screen.

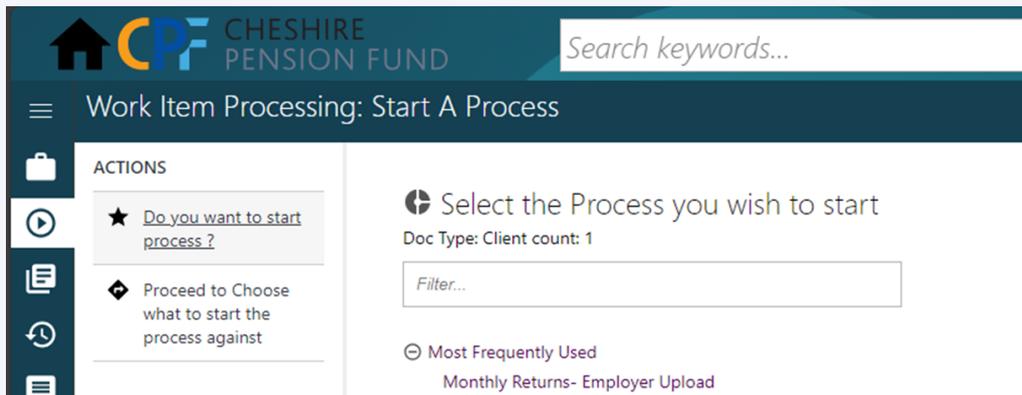
# SUBMITTING YOUR MONTHLY INTERFACING FILE

## STARTING THE MI PROCESS

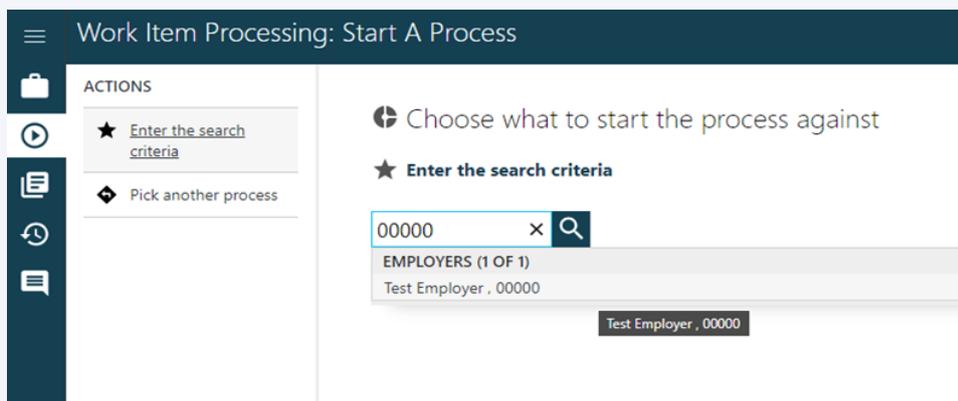
1. To start the Monthly Interfacing Upload process please click the 'Start a Process' tile on your Dashboard:



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:



**Employer Details**

Reference:	00000
Name:	Test Employer
Status:	Active

---

**Additional Details**

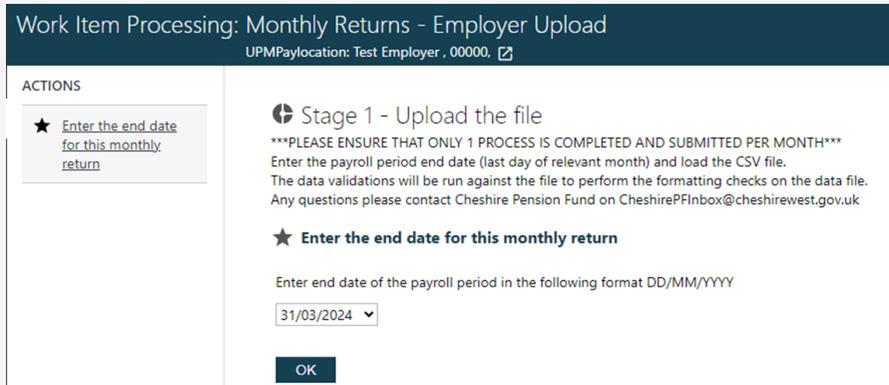
There are no additional details

**Submit**

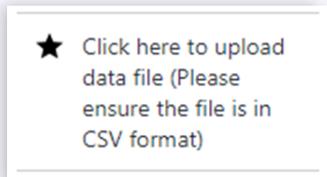
5. The process should then open automatically, if it does not open then simply go to the Work Feed and the process should be there for you to open.

# 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'



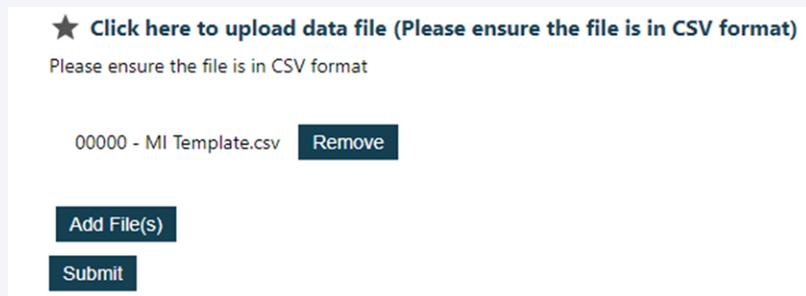
2. In the Actions section, click on the 'Click here to upload data file...' box and press Add



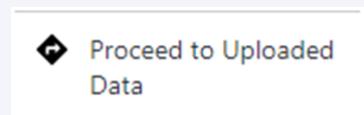
3. Add your MI file from your computer by clicking 'Add File(s)':



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

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

Select	Valid?	Line	Error Messages	Executed	Modified?
<input type="radio"/>	X	17	Error: DOA must be present for joiners (58)		
<input type="radio"/>	✓	2			
<input type="radio"/>	✓	3			
<input type="radio"/>	✓	4			
<input type="radio"/>	✓	5			

- 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).**

Select	Valid?	Line	Error Messages
<input checked="" type="radio"/>	X	17	Error: DOA must be present for joiners (58)

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

Notifications

**Warning**  
Error: DOA must be present for joiners (58)

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

Save Save & Validate Cancel

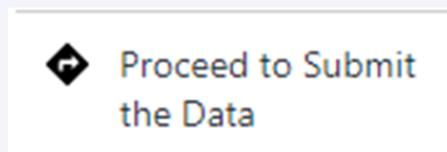
- Repeat the above for all lines of data with errors. Once you have resolved all the errors, all rows should have a tick ✓. You'll then be able to submit the file. Press 'Close'.

★ **View/Edit Data on the file**

If you correct any errors you will need to revalidate each row

<input type="checkbox"/>	Valid?	Line	Error Messages	Executed	Modified?
<input type="checkbox"/>	✓	2			
<input type="checkbox"/>	✓	3			
<input type="checkbox"/>	✓	4			

- 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':

ACTIONS

- ★ [View/Edit Data on the file](#)

Stage 3 - Submit the Data

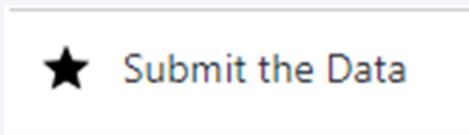
Ensure there are no errors remaining before you formally submit the validated file to the Pension Fund and produce the remittance advice.

★ [View/Edit Data on the file](#)

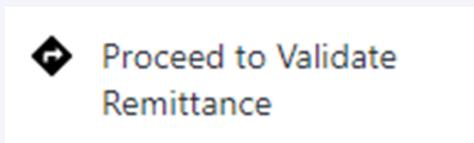
[Add row](#) [Edit row](#) [Delete row](#) [Close](#)

Select	Valid?	Line	Error Messages	Executed	Modified?
<input type="radio"/>	✓	2			
<input type="radio"/>	✓	3			

2. Click 'Submit the Data' in the Actions section.

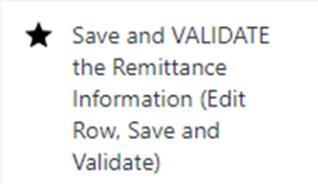


3. Click 'Proceed to Validate Remittance' in the Actions section.



# STAGE 4 – VALIDATING THE REMITTANCE ADVICE

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



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)

<input type="button" value="Add row"/> <input type="button" value="Edit row"/> <input type="button" value="Delete row"/> <input type="button" value="Close"/>									
Select	Valid?	Line	EMPLOYERNO	APCSEMPLOYEEEREGULAR	APCSEMPLOYEEELUMPSUM	APCSEMPLOYERREGULAR	APCSEMPLOYERLUMPSUM	ADDYRSCONTSUM	
<input type="radio"/>	X		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

4. Press 'Close'

Select	Valid?	Line	EMPLOYERNO
<input type="radio"/>	✓		00000

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

**CHECK LIST**

- ★ [Has the Remittance Information been Validated \(Green Tick\)](#)

**ACTIONS**

- ✓ Transfer the data into the Remittance Advice
- ✓ Save and VALIDATE the Remittance Information (Edit Row, Save and Validate)
- ◆ Reject

**Stage 4 - Validate Remittance Advice**

The remittance data entry (or entries) should be checked carefully. If after checking the remittance advice totals, any discrepancies are found, and If Remittance Advice is all correct - this MUST be Validated (Green Tick next to

★ **Has the Remittance Information been Validated (Green Tick)**

No

Yes

**Submit**

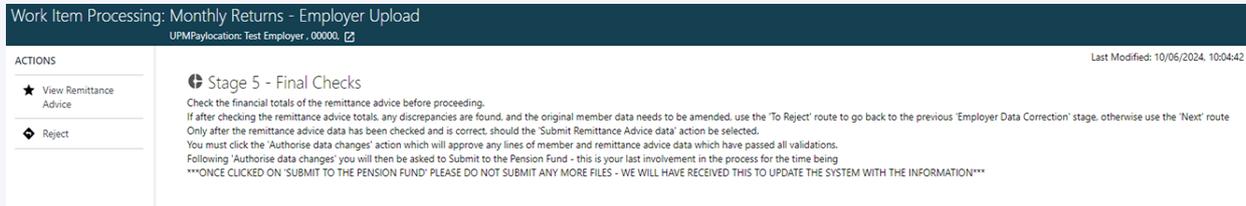
Select 'Yes' and click 'Submit'.

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

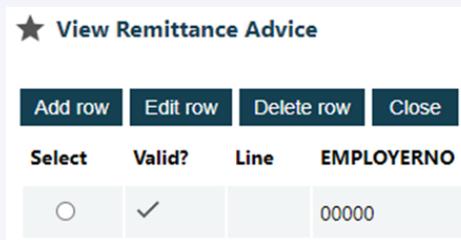
◆ Proceed to Final Checks

# STAGE 5 – FINAL CHECKS

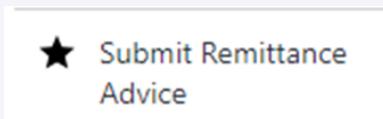
1. You'll be presented with the following screen. Here click 'View Remittance Advice' from the Actions section ensuring that all the lines are validated accordingly:



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](mailto:CheshirePFinbox@cheshirewestandchester.gov.uk)