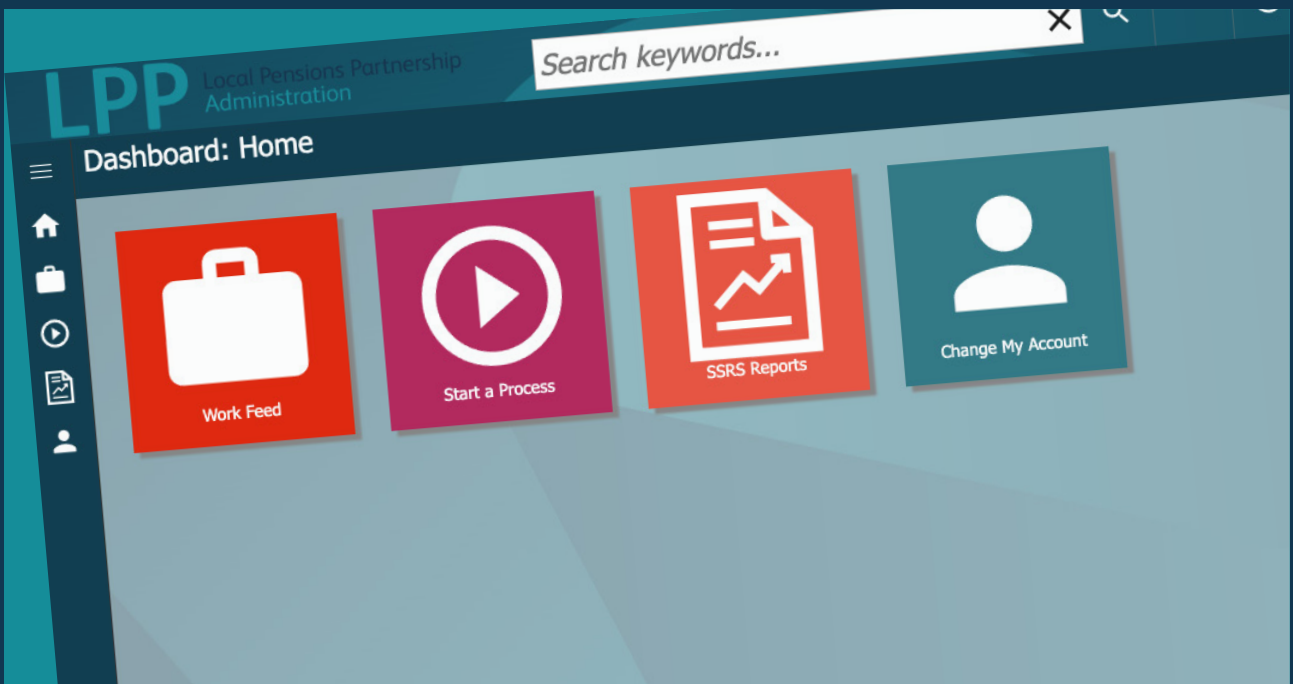




LPP

Local Pensions Partnership
Administration

Employer Portal User Guide



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Access to the employer portal

There are three different levels of access:

Read Only (Lowest level of access) – You can search for members and employers (and see their details). However you can't start any processes or view the work trays.

General Processing (Medium level of access) – Most users will have this level of access. You can start and complete all processes, run reports and access work trays when these are made available.

Site Administrator (Highest level of access) – You can do everything a general processing user can do, with additional features, such as having access to full reports. You can also create, amend access levels and deactivate new users for your organisation.

The table below gives a breakdown of what each level of access give you access to.

Functionality	Site Administrator*	General Processing	Read Only
Create New Users	✓		
Reset Passwords	✓		
Access Work trays	✓	✓	
Complete Processes	✓	✓	
Search for members/ employer	✓	✓	✓
Edit members	✓	✓	
Access Reports	✓	✓	Limited
Access Dashboard	✓	✓	✓
Change own Details	✓	✓	✓

Please be aware, there must be a minimum of one user with Site Administrator access in your organisation.

TOP TIP

We recommend that your organisation has two users with Site Administrator access to the portal.

Logging in

Activating your account

You will need a Site Administrator to add you as a new user and set up your account. Once you've received an email to say you've been added, and obtained details of your activation code from your Site Administrator, you can activate your account.

To activate your account, you will need your:

- Username - this can be found in the email you have received.
- Activation code - get this from your Site Administrator.

Then follow the below steps:

1. Click on the link in the email.
2. Input your username and activation code into the relevant boxes and click "submit."
3. On the Terms and Conditions page, tick the boxes to say you have accepted them and select 'submit.' You can't proceed until you have done this.
4. Input your contact details (as advised on screen)
5. Set your password, security questions and answers. For example, What is your mother's maiden name? Then select 'submit.'
6. Your account will now be activated. And you will be redirected to the employer portal homepage to log in.

TOP TIP

Please be aware, your password must contain 1 number, lower and uppercase letters and a special character (e.g. \$) and be at least 8 characters long.

TOP TIP

Answers to your security questions are case sensitive.

Forgotten your username or password?

If you've forgotten your username, password or security question, just follow the steps below.

1. Click on 'Forgotten your user details?' on the log in page (Fig. 1).
2. Select the appropriate option from the menu (Fig. 2).
3. Follow the instructions when prompted. For example, if you've forgotten your password:
 - a. You'll need to provide your username, mobile phone number and email address (Fig. 3).
 - b. Once you've submitted these details, you'll receive an email with a link and your temporary password. Click on the link to log in to the portal with your username, temporary password, and your chosen security question.
4. Once signed in, you'll be taken to your Dashboard and be able to access the portal as normal.

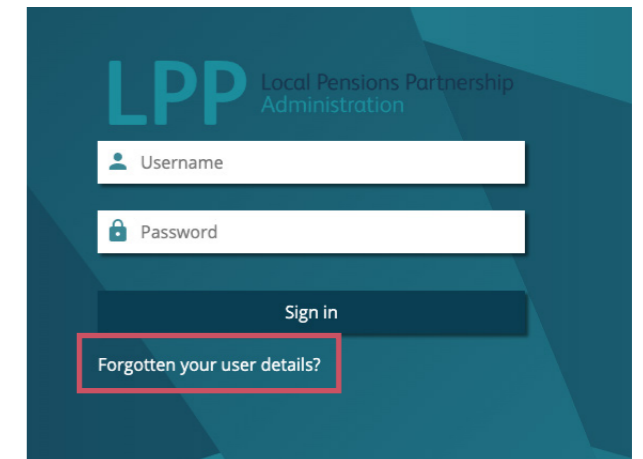


Fig. 1

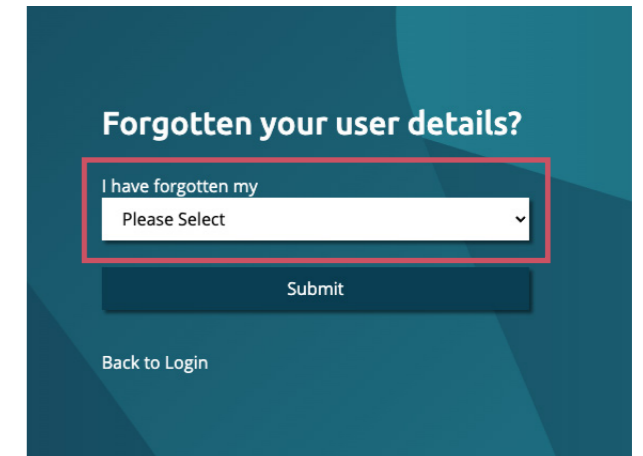


Fig. 2

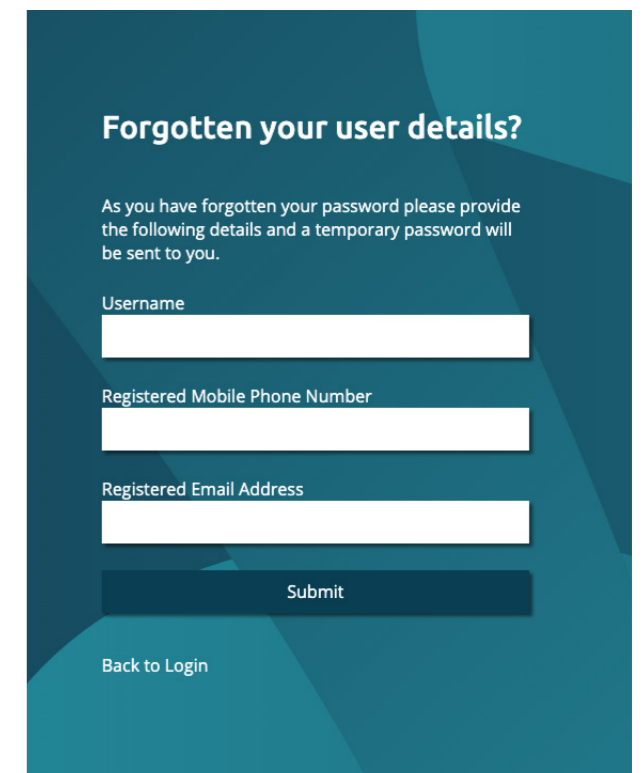


Fig. 3

Navigation

Navigating across the Employer Portal

You can navigate across the portal from your Dashboard (Fig. 1).

This is your home page, which includes a series of icons that you can click on to navigate to different areas of the portal, such as:

- Work Feed
- Start a Process
- SSRS Reports
- Change My Account

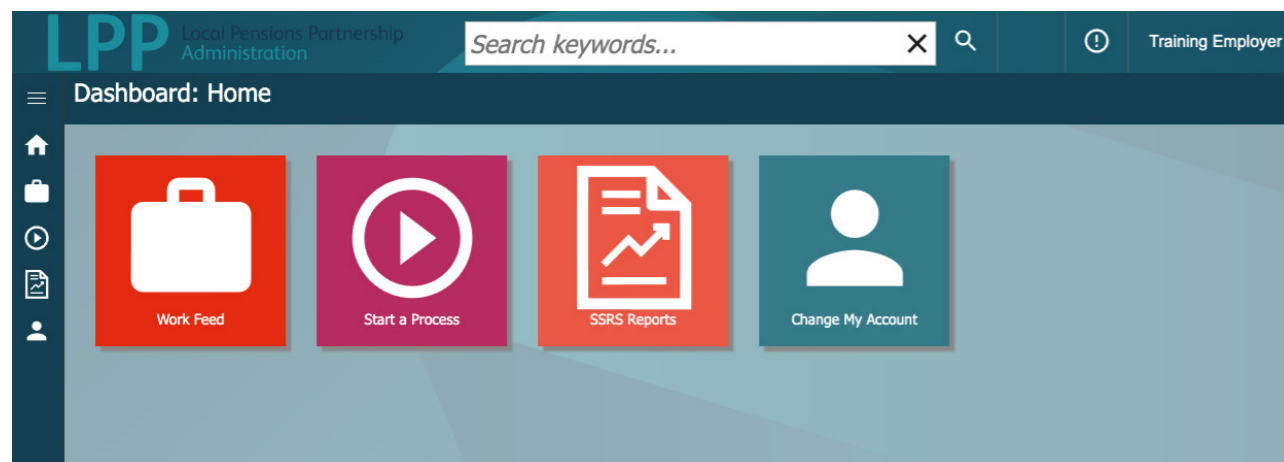


Fig. 1

How to access a member's details

TOP TIP Use the search bar to find any active member or employer records.

You can search for a member (Fig. 2) by their:

- Forename
- Surname
- Pension Reference Number (Member Folder Reference)
- Member National Insurance number
- Payroll number

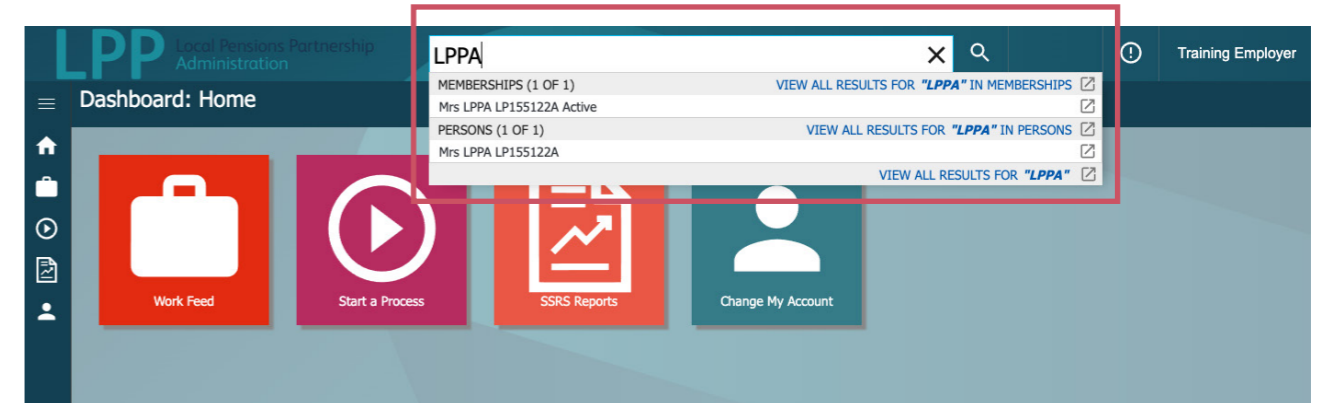
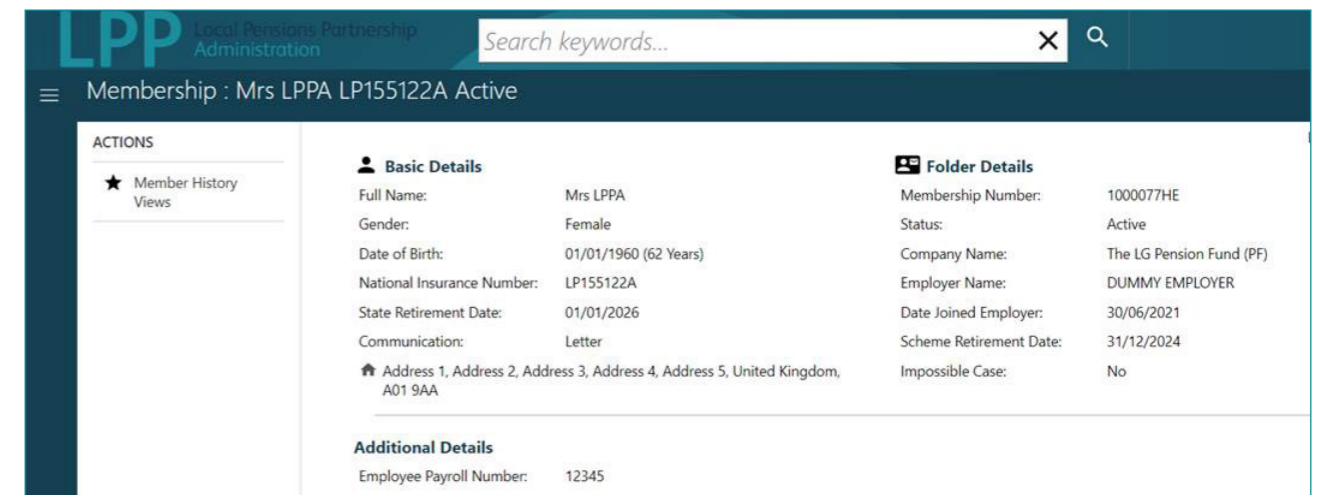


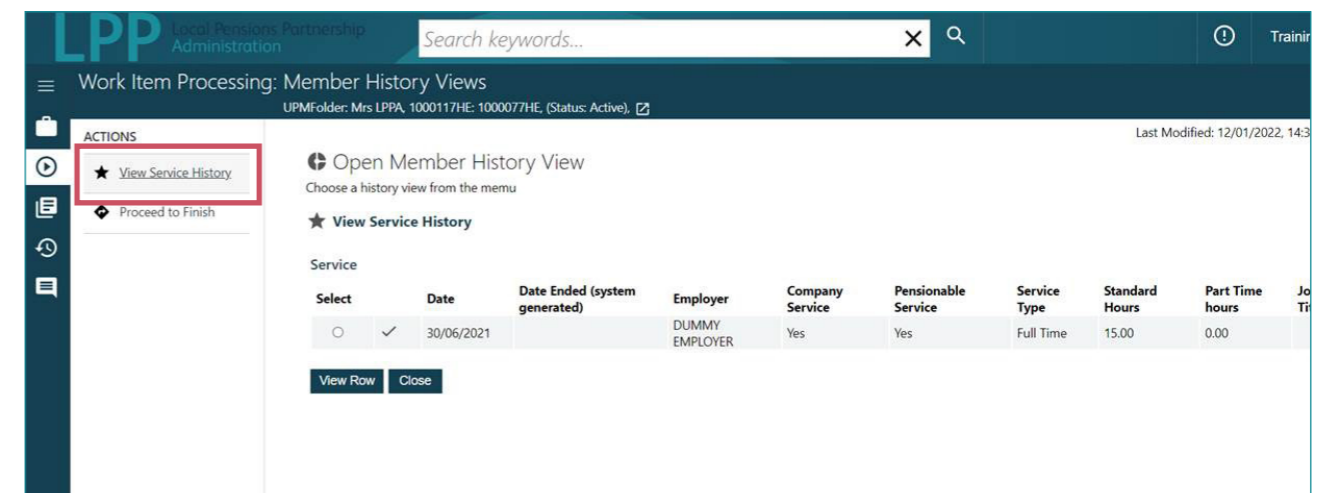
Fig. 2

To access a member's details, follow the steps below:

1. Input the member's details you are searching with into the search bar along the top of your dashboard.
2. Select the member's record you need from the list that appears on the screen. Click the button (on the right-hand side of the list) to view the record in a new tab. The member's details should appear as below.



3. Click on **View Service History** to see the below list. You can also click on each row to look at the information in more detail.

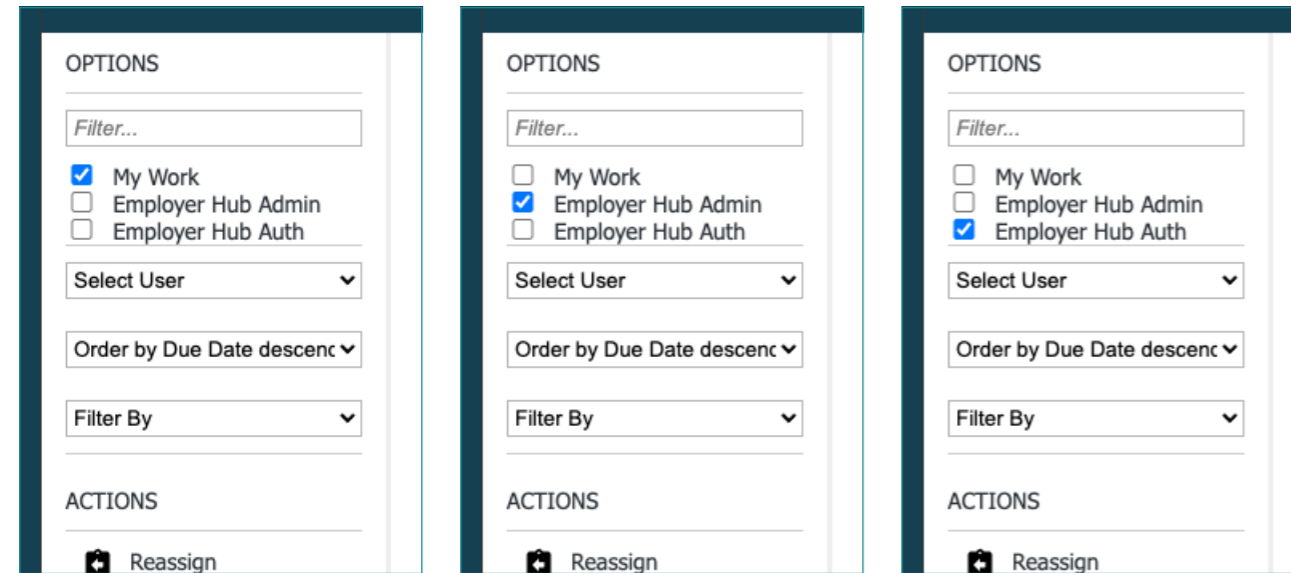
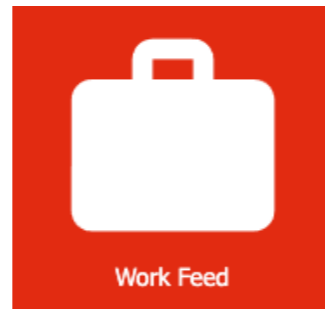


Explaining the Work Feed area

How to navigate your work feed/functionality

The Work Feed icon on your dashboard will give you access to your individual work tray and at least one group tray.

From here, you can choose whether you want to look at your own work (by ticking My Work), or look at a group tray you have access to (by ticking Employer Hub). You can also choose if you want to look at both of these things (by ticking both options).

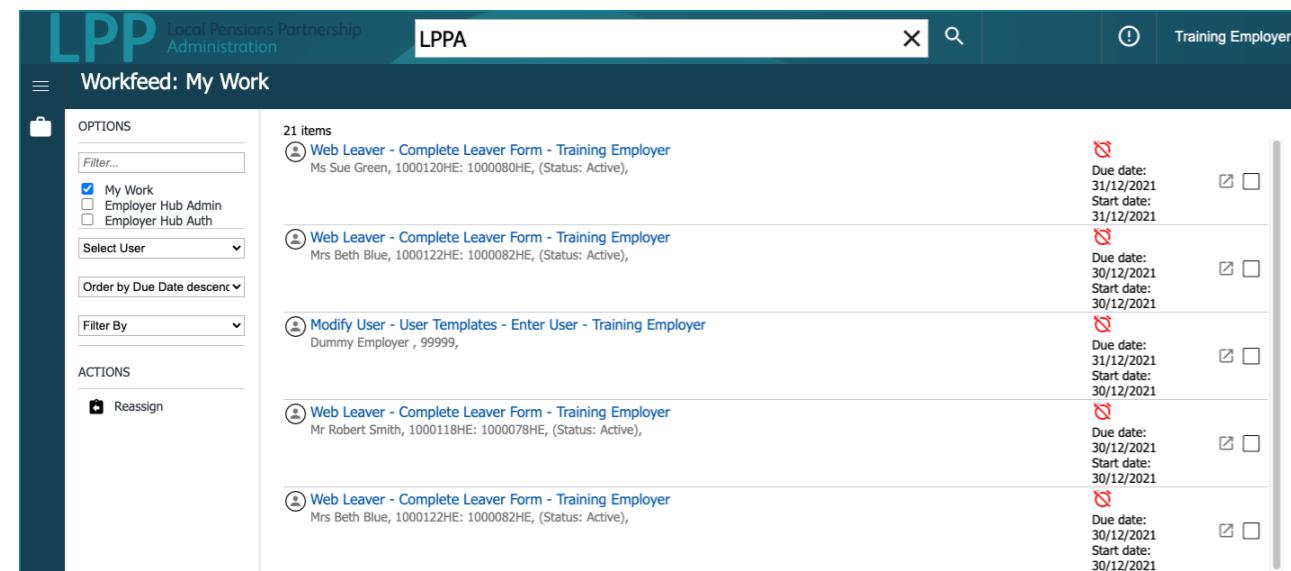


Reassigning processes

You can reassign a process to another user in your organisation by following the steps below.

1. Select the process you want to reassign and tick the relevant box on the right.
2. Select reassign. This will provide a list of users that the process can be reassigned to.
3. Select the user you need. The process will then be reassigned to that user and be visible in their group tray, ready for them to work on.

Your Work Feed screen will show you what items need to be actioned and when (as shown below).

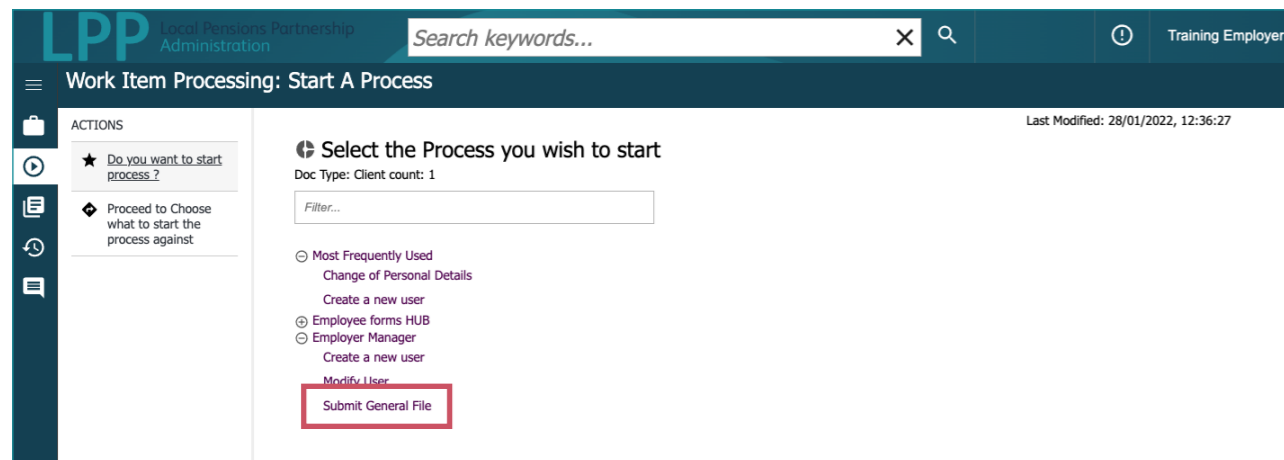


TOP TIP

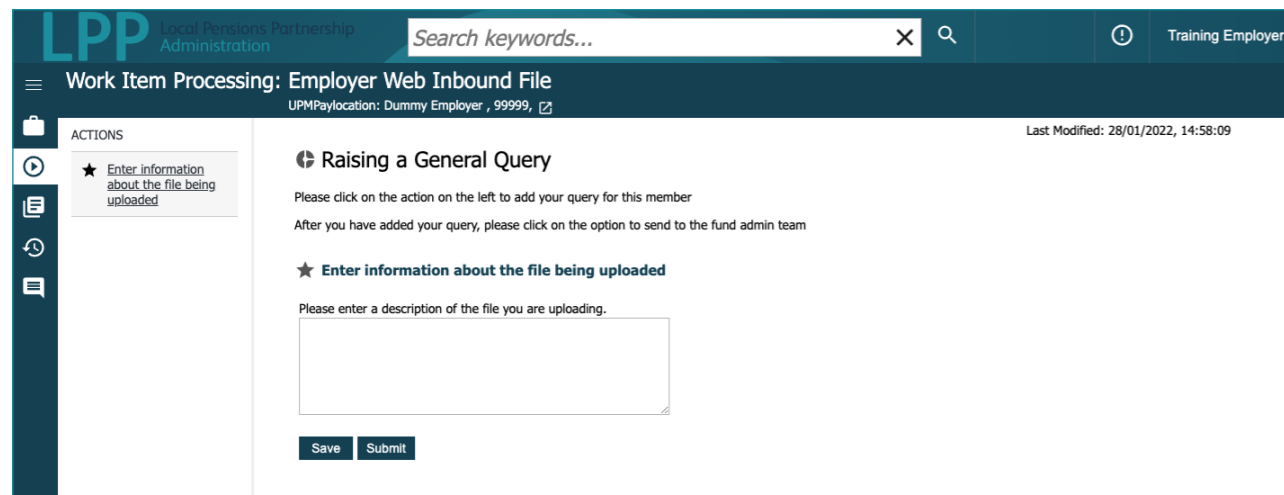
Use the 'order by' and 'filter by' drop-down options on the left of the screen to see which actions are a priority, such as those that have a certain due date.

Submitting a file to LPPA

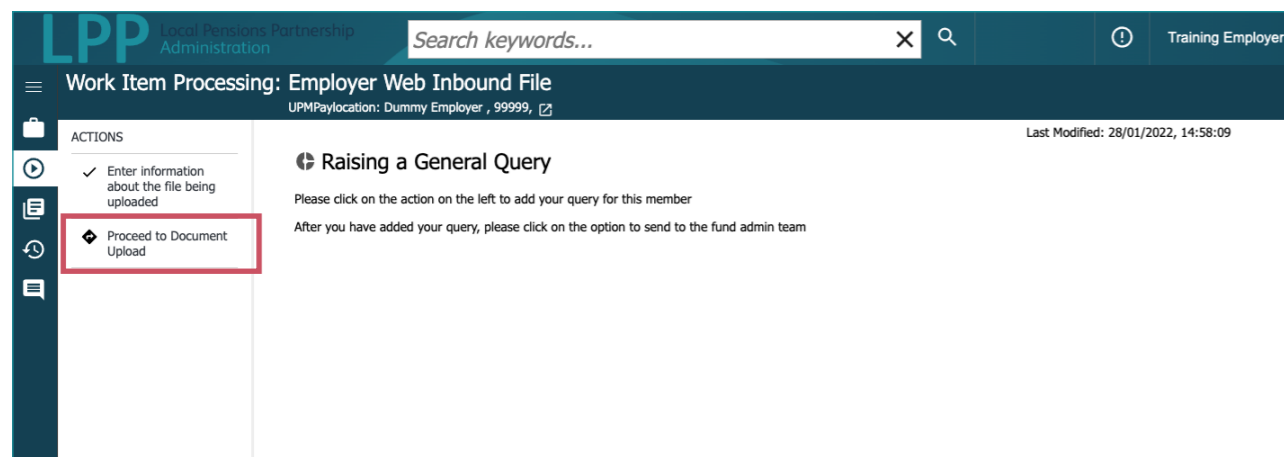
Under the start a process tile select the submit general file option.



You will then need to search for the employer you wish to submit the process against and select submit. Enter any information that is relevant to the document you are uploading then select submit.

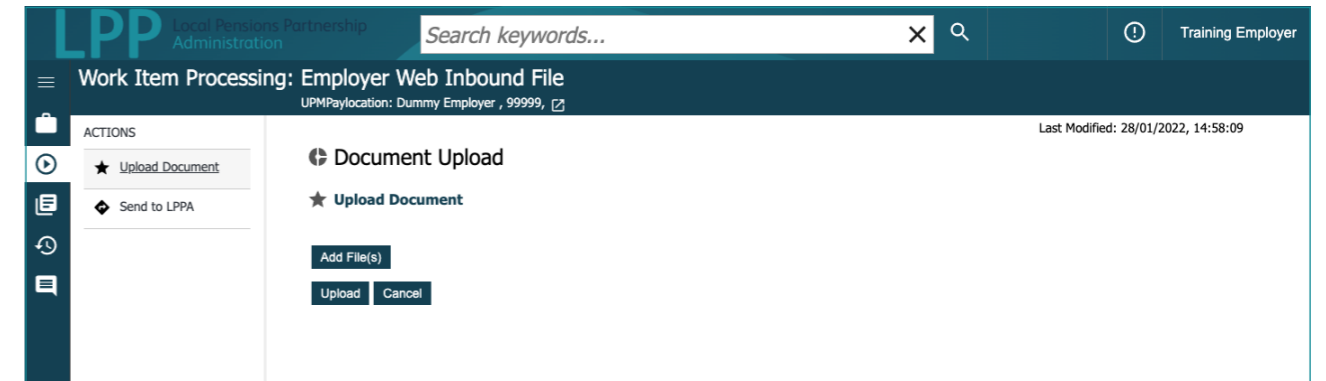


Select proceed to document upload



Select add file and choose the document you need to upload.

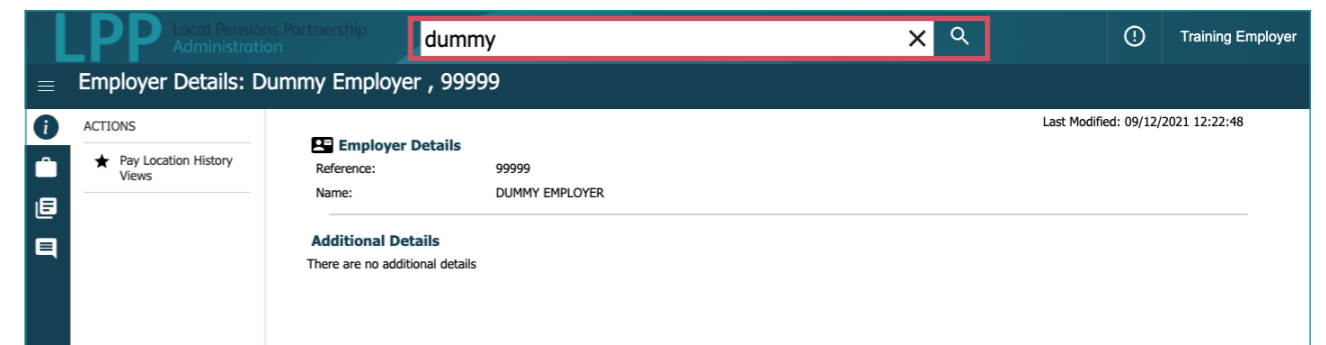
Once this has been completed select send to LPPA.



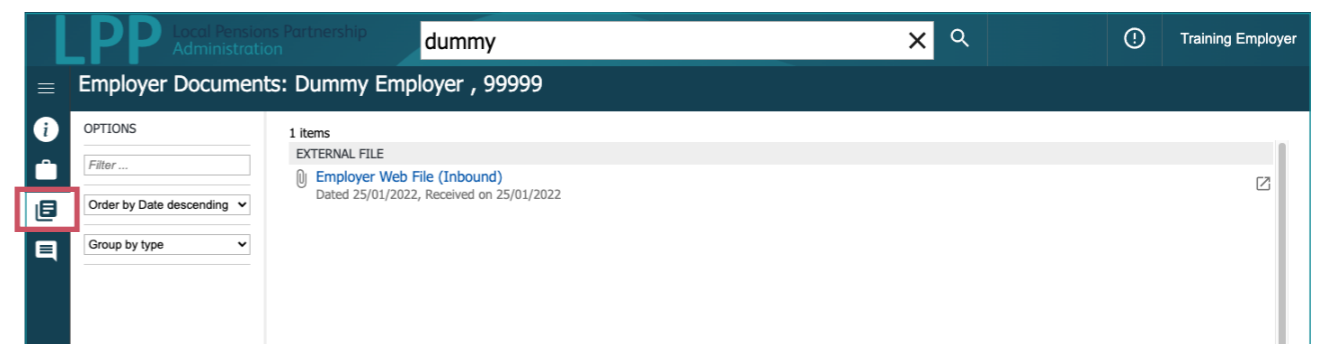
Receiving a file from LPPA

When LPPA share a file or document with you, you will receive an email notification asking you to log in to the employer portal to access and review it.

Search for the employer in the search box to bring up the employer details.



Once you have found the correct employer select the employer documents button on the left hand side of the screen.

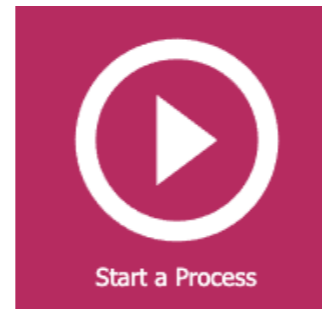


This will then show you the document that has been submitted by LPPA.

Start a Process

TOP TIP

In the portal all processes are started through the Start a Process tile. This is where you submit information to us and will replace online forms.



If you know the process you are looking for you can search in the filter box (Fig. 1).

When you come to use the system more often, the processes will also be listed in order of most frequently used.

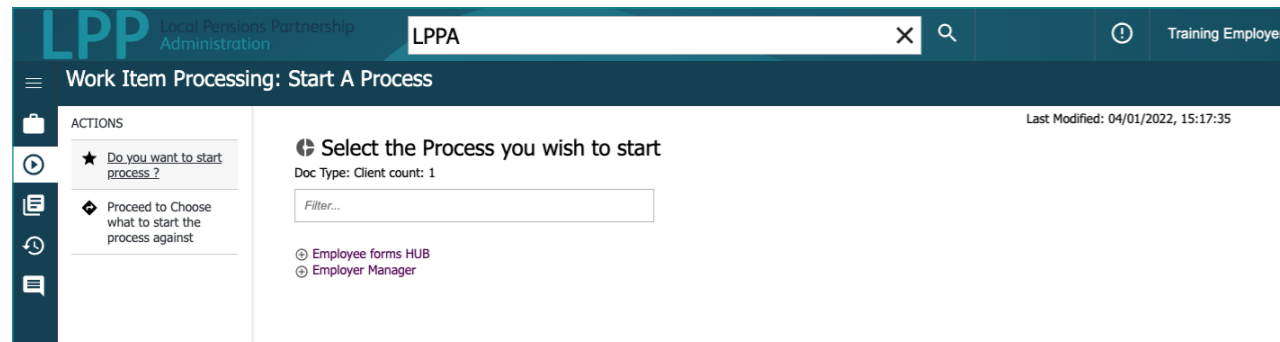


Fig. 1

- Select the process you wish to start
- You will then need to choose the member or employer to start the process against.

It will either:

Ask you to search for membership and you will need to either search for the NI number, payroll number or pension reference number.

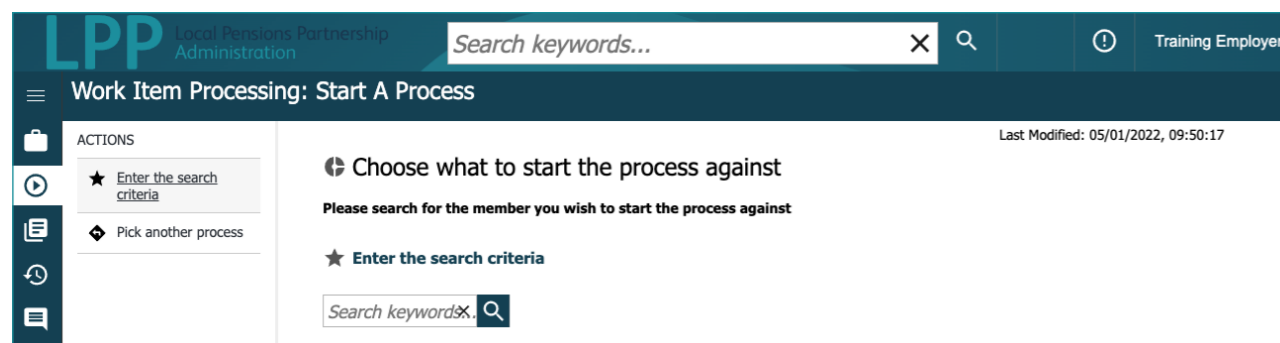


Fig. 2

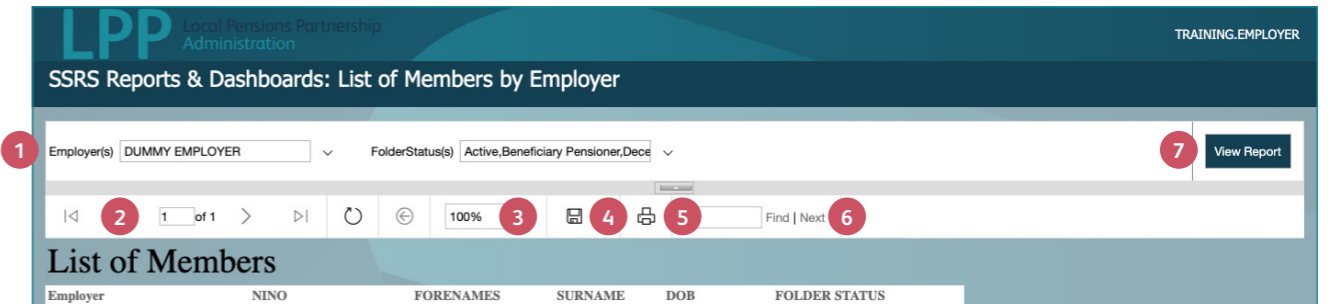
Or you will need to search by your employer and select submit to start the process.

- It will then bring up the member or employer details and you will need to press submit to bring up the form.
- You will then need to complete the information on the page and ensure you complete all the required fields, then select submit.

SSRS Reports

This is where you will be able to view your own reports to assist your employer duties and to help improve the quality of the data submitted.

Initially, you will be provided with a report that provides you with a count of your members by status. Over the coming months, the number of reports available to you will be expanded. Please keep an eye on this section of the employer portal for any new reports.



1. **Parameters** - are available to limit the results of the report based upon specified categories depending on the report.
2. **Pages** - If the report runs on to multiple pages, you can either scroll through page numbers or input a page number to search for. There will always be a total listed in a green bar to signal the report's end.
3. **Resize** - you can resize the report to adjust to fit on one page if appropriate or to zoom in.
4. **Export** - Multiple export options are available to allow export and save outside the employer portal. We recommend reports are exported to either Excel or CSV format, where they can be filtered, sorted and manipulated using existing excel functionality.
5. **Print** - you can print hardcopies of the report directly from the employer portal.
6. **Find** - you can search for specific items within reports e.g. surname, payroll number, NINO. If more than one result is returned, the "next" option will allow you to look through all available search results.
7. **View Report** - once parameters have been set, the "view report" button will run the report. If parameters are changed when in a report, this can be selected to refresh the results.

Explaining the Change My Account area

Changing your user details

If you need to make changes to your user details, you can do this in the Change My Account area of the portal. You can change your:

- Email address
- Phone number
- Personal details
- Security questions and answers
- Username and password

To change your details, just follow the steps below.

1. Click on the Change My Account icon.
2. Under 'change my user details' select yes to the details you wish to change (Fig. 1)
3. Confirm your password (when asked to on screen) and select submit. Your user details will now be updated.

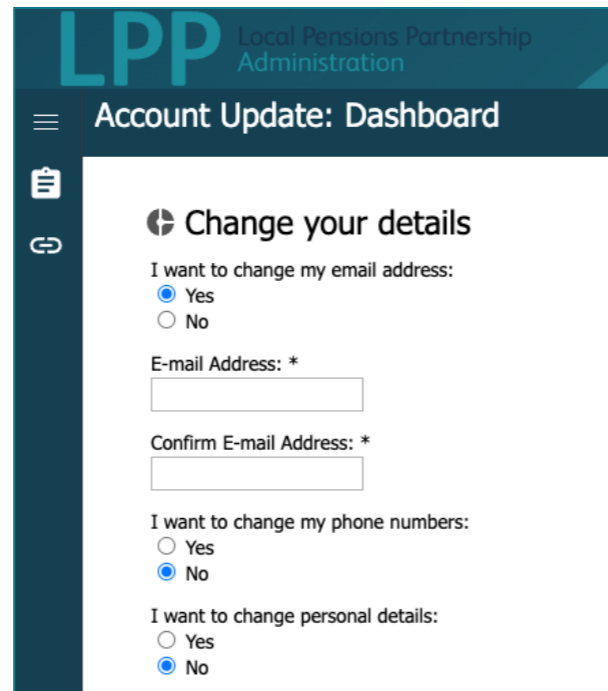
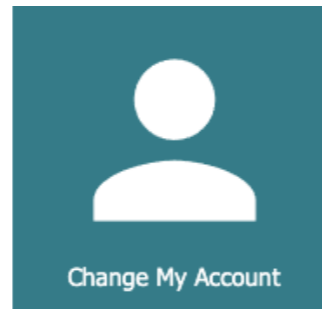


Fig. 1

Changing your password

To change your password follow these simple steps:

1. In the Change My Account section, select 'change my account, and then select 'change my password'.
2. Type in your current password and a new password in the relevant boxes (Fig. 2).
3. Press submit to confirm your new password.

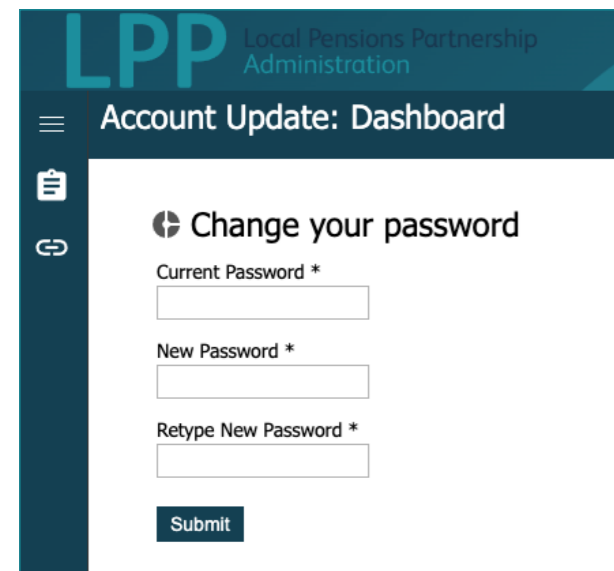


Fig. 2

How to create a new user

If you're a Site Administrator, you are responsible for giving your colleagues within your own organisation access to the employer portal. To do this, you need to create them as a new user. Please be aware, you can't do this if you don't have Site Administrator access (see the Access to the employer portal section for details).

To create a new user, just follow the steps below:

1. In the Change My Account section, click on 'Start a Process' and under Employer Manager select 'create a new user'.
2. Search for the employer you want to create as a user.
3. Fill out the user's account details (Fig. 3) and click submit.
4. You will then be taken to a page to authorise the new user account you've created (Fig. 4). Check the details and click submit.
5. You should now receive an email, which includes the new user's activation code for them to activate their account. This code is only valid for three days.

An email will also be sent to the user, which includes their username and a link to the portal where they can enter their activation code and set up their log in details.

Please note, as a security measure, the user will be told to contact you to provide them with their activation code.

This section is for Site Administrators only

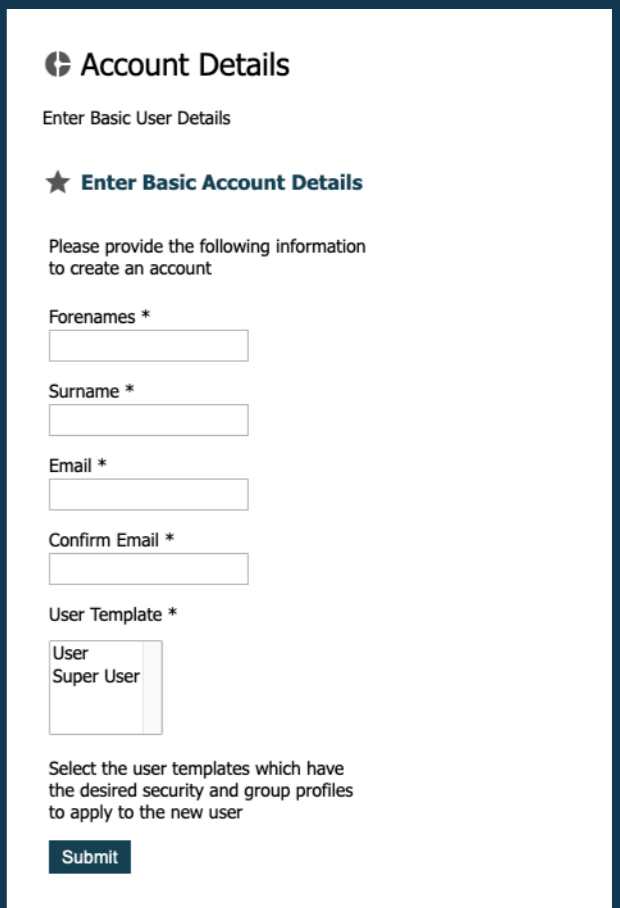


Fig. 3

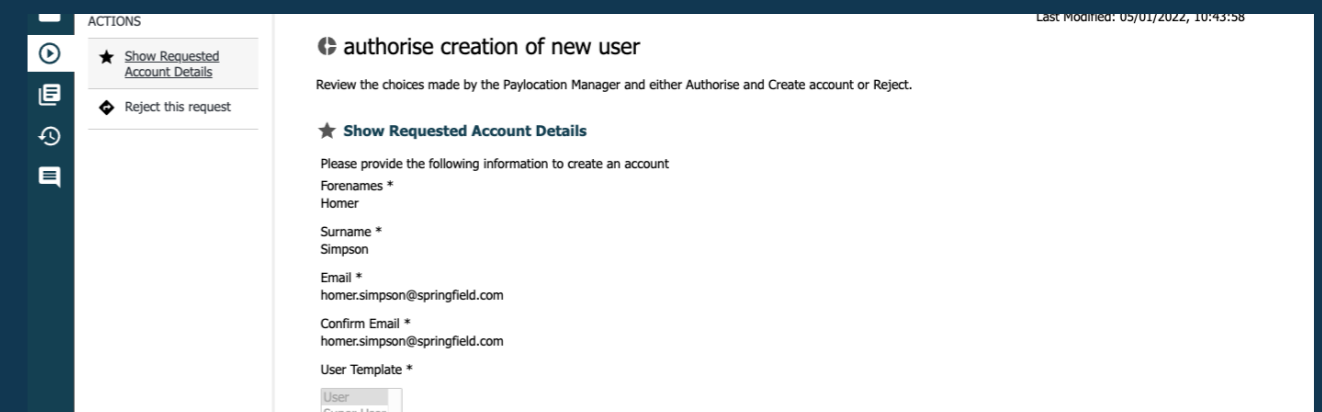


Fig. 4

Important information:

If you are wishing to create or amend the access for a user from outside your organisation (i.e. your payroll provider), then please inform LPPA of the changes using the Employer Contact Form

Possible error messages and avoiding them

Logging in error message

If you enter your log in details incorrectly, such as your password or security question, a warning error message will appear on the screen.

Please be aware you have THREE attempts to input your details correctly before your account is locked. Only a Site Administrator can unlock a locked user account. They can do this via the 'reset user password' process.

File type not allowed error message

If you see the error message opposite, it will be because you have tried to upload an incompatible type of file. You'll need to remove the file and replace it with a correct file type instead.

Please be aware that you can only use certain types of files when carrying out some processes.

Need any more help?

We hope you have found this guide to using the employer portal useful.

If you need any more help or assistance, please contact the LPPA Employer Engagement team using the [Employer Contact Form](#) on our website.



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