

**Employer  
Self Service**

*How to...*

## *New Starter Creation*

- ✓ **Set up a new starter**



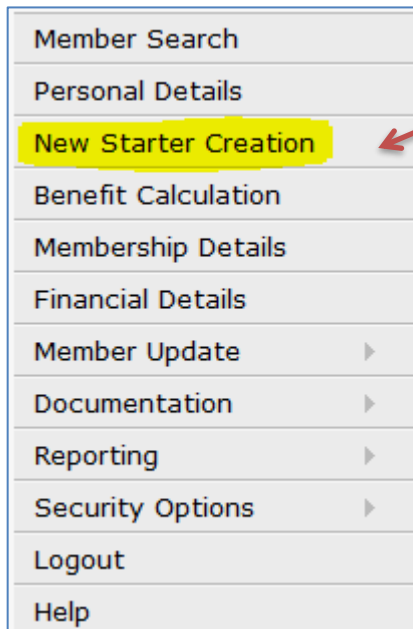
THE ROYAL COUNTY OF  
**BERKSHIRE**  
PENSION FUND

# New Starter Creation

ESS enables you to create a pension record for any new Scheme members directly onto our pension administration system. This eliminates the need to manually complete a form or spreadsheet.

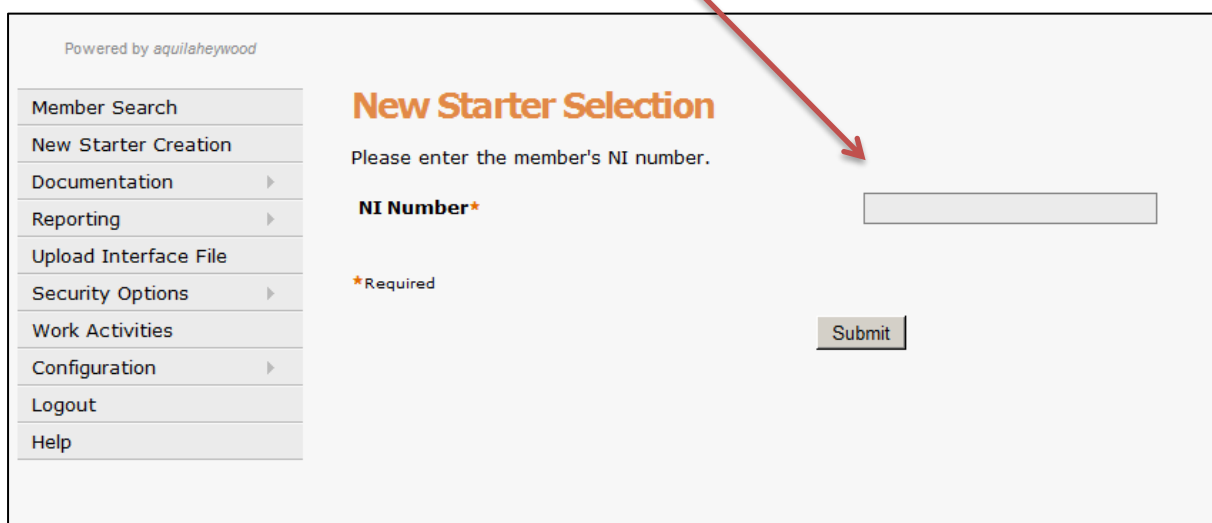
This section of the guide takes you through the step by step creation of a new member record.

Navigate to the left hand menu options and select **“New Starter Creation”**



You will be presented with the **“New Starter Selection”** screen and prompted for the member’s National Insurance number

Enter the member’s **National Insurance number** and select **“Submit”**



You will be presented with the "New Starter Creation" screen:

## New Starter Creation

Please complete the new starter details.

|                           |  |                               |                                |
|---------------------------|--|-------------------------------|--------------------------------|
| <b>NI Number</b>          | <input type="text" value="tn142525f"/> | <b>Title</b>                  | <input type="text" value="1"/> |
| <b>Surname*</b>           | <input type="text" value="2"/>         | <b>Forenames*</b>             | <input type="text" value="3"/> |
| <b>Sex*</b>               | <input type="text" value="4"/> male    | <b>Date of Birth*</b>         | <input type="text" value="5"/> |
| <b>Disclosure Opt-out</b> | <input type="checkbox"/>               | <b>Date of Birth Verified</b> | <input type="checkbox"/>       |
| <b>Partnership Status</b> | <input type="text" value="6"/>         | <b>Previous Surname</b>       | <input type="text" value="7"/> |
| <b>Spouse Initials</b>    | <input type="text" value="8"/>         | <b>Spouse DofB/DofD</b>       | <input type="text" value="9"/> |
| <b>Date of Marriage</b>   | <input type="text" value="10"/>        |                               |                                |

|                     |                      |                   |                      |
|---------------------|----------------------|-------------------|----------------------|
| <b>Checked</b>      | <input type="text"/> | <b>Checked By</b> | <input type="text"/> |
| <b>Checked Date</b> | <input type="text"/> |                   |                      |

|                     |                                 |                          |  |
|---------------------|---------------------------------|--------------------------|--|
| <b>Job Title</b>    | <input type="text" value="11"/> | <b>Payroll Reference</b> | <input type="text" value="12"/>        |
| <b>Post Number</b>  | <input type="text" value="13"/> | <b>Scheme*</b>           | <input type="text" value="14"/> ect -- |
| <b>Leave Blank</b>  | <input type="text"/>            | <b>Employer</b>          | <input type="text" value="16"/> ect -- |
| <b>Date Joined</b>  | <input type="text" value="15"/> | <b>Employment Type*</b>  | <input type="text" value="18"/>        |
| <b>Fund*</b>        | <input type="text"/>            | <b>Contribution Rate</b> | <input type="text" value="19"/>        |
| <b>Pay On Entry</b> | <input type="text" value="17"/> |                          |  |

|                        |                                 |                        |                                 |
|------------------------|---------------------------------|------------------------|---------------------------------|
| <b>Part Time</b>       | <input type="text" value="20"/> |                        |                                 |
| <b>Part Time Hours</b> | <input type="text" value="21"/> | <b>Full Time Hours</b> | <input type="text" value="22"/> |
|                        |                                 | <b>Percentage</b>      | <input type="text" value="23"/> |

|                         |                                 |
|-------------------------|---------------------------------|
| <b>Address (Line 1)</b> | <input type="text" value="24"/> |
| <b>Address (Line 2)</b> | <input type="text" value="to"/> |
| <b>Address (Line 3)</b> | <input type="text" value="28"/> |
| <b>Address (Line 4)</b> | <input type="text"/>            |
| <b>Address (Line 5)</b> | <input type="text"/>            |
| <b>Postcode</b>         | <input type="text"/>            |
| <b>Telephone Number</b> | <input type="text" value="29"/> |
| <b>Mobile Number</b>    | <input type="text" value="30"/> |
| <b>E-mail Address</b>   | <input type="text" value="31"/> |

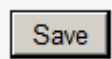
|                                   |                                 |                              |                                 |
|-----------------------------------|---------------------------------|------------------------------|---------------------------------|
| <b>Auto Enrolment Entry Event</b> | <input type="text" value="32"/> | <b>Auto Enrolment Status</b> | <input type="text" value="33"/> |
|-----------------------------------|---------------------------------|------------------------------|---------------------------------|

Complete fields 1-33

|                             |    |                    |  |
|-----------------------------|----|--------------------|--|
| *<br>=<br>Required<br>field | 1  | TITLE              | <ul style="list-style-type: none"> <li>• Cllr</li> <li>• Dr</li> <li>• Miss</li> <li>• Mr</li> <li>• Mrs</li> <li>• Ms</li> <li>• Prof</li> <li>• Sir</li> </ul>   |
| *                           | 2  | SURNAME            |  |
| *                           | 3  | FORENAMES          |  |
| *                           | 4  | SEX                |  |
| *                           | 5  | DATE OF BIRTH      | Please enter in format <b>DD/MM/YYYY</b>   |
|                             | 6  | PARTNERSHIP STATUS | <ul style="list-style-type: none"> <li>• Civil Partnership</li> <li>• Declared Partnership</li> <li>• Divorced</li> <li>• Married</li> <li>• Single</li> <li>• Widowed</li> </ul>  |
|                             | 7  | PREVIOUS SURNAME   | IF KNOWN   |
|                             | 8  | SPOUSE INITIALS    | IF KNOWN   |
|                             | 9  | SPOUSE DofB        | IF KNOWN   |
|                             | 10 | DATE OF MARRIAGE   | IF KNOWN (please enter <b>DD/MM/YYYY</b>   |
|                             | 11 | JOB TITLE          | Employee's job title   |
|                             | 12 | PAYROLL REFERENCE  | Employee's Pay reference number  |
|                             | 13 | POST NUMBER        | Employee's post number if applicable   |
| *                           | 14 | SCHEME             | Please select Berkshire Pension Fund from the drop down menu   |
| *                           | 15 | DATE JOINED FUND   | Please enter the date from which the member commenced pension contributions. Please enter <b>DD/MM/YYYY</b>  |
| *                           | 16 | EMPLOYER           | Please select your employer name from the drop down menu   |
| *                           | 17 | PAY ON ENTRY       | The member's annual pensionable salary at the point of entry to the LGPS   |
| *                           | 18 | EMPLOYMENT TYPE    | Please enter "Officer" in this field   |
| *                           | 19 | CONTRIBUTION RATE  | Employee contribution rate @ date of entry to the LGPS   |
| *                           | 20 | PART-TIME          | <p>If the member is part-time please select from the drop down list:</p> <ul style="list-style-type: none"> <li>• Casual</li> <li>• Variable time</li> <li>• Yes-part-time</li> </ul> <p>If member is full-time you can leave this section blank</p> |
|                             | 21 | PART TIME HOURS    | Enter number of part time hours here <b>XX.XX</b>  |
|                             | 22 | FULL TIME HOURS    | Enter number of full-time equivalent hours here (i.e 37.00)  |

|   |                 |                                   |  |
|---|-----------------|-----------------------------------|--|
|   | <b>23</b>       | <b>PERCENTAGE</b>                 | Percentage of a full time equivalent   |
| Part-time hours can be expressed as either a percentage or a ratio but not both. Please complete either the Part Time Hours /Full Time Hours field OR the Percentage field. |                 |                                   |  |
|   | <b>24 to 28</b> | <b>ADDRESS AND POSTCODE</b>       | Please complete fields 24 to 28 in uppercase with the member's full home address and postcode  |
|   | <b>29</b>       | <b>TELEPHONE NUMBER</b>           | IF KNOWN   |
|   | <b>30</b>       | <b>MOBILE NUMBER</b>              | IF KNOWN   |
|   | <b>31</b>       | <b>E-MAIL ADDRESS</b>             | IF KNOWN   |
|   | <b>32</b>       | <b>AUTO-ENROLMENT ENTRY EVENT</b> | <ul style="list-style-type: none"> <li>• Eligible Job Holder</li> <li>• Entitled Worker</li> <li>• Ineligible</li> <li>• Non-eligible Job Holder</li> </ul>  |
|   | <b>33</b>       | <b>AUTO-ENROLMENT STATUS</b>      | <ul style="list-style-type: none"> <li>• Already member of Qualifying Scheme</li> <li>• Auto Enrolled</li> <li>• Joiner</li> <li>• Leaver</li> <li>• Opt-in</li> <li>• Opt-out</li> <li>• Unknown</li> </ul> |

- Click Save





## Members who are already held on Altair - creation of a second employment

If there is a member present in the Altair database with the same NI number specified, you will be presented with the following screen:

### Verify Member Details

The NI Number **YY389319C** matches to a member to whom you do not currently have access. To proceed to employment creation, please confirm the following details for the member.

**Surname\***  **Date of Birth\***  

**Sex\***  

\*Required

You will be required to enter the member's **Surname**, **Sex** and **Date of Birth** for verification.

If the details you entered are verified you will be presented with the "**New Starter Creation**" screen.

You will see that some of the fields are already populated with the information that we currently hold on Altair. Please complete the vacant fields as described on page 23.

## New Starter Creation

Please complete the new starter details.

|                           |                          |                               |                                     |
|---------------------------|--------------------------|-------------------------------|-------------------------------------|
| <b>NI Number</b>          | ABI111111A               | <b>Title</b>                  |                                     |
| <b>Surname*</b>           | TEST                     | <b>Forenames*</b>             | A                                   |
| <b>Sex*</b>               | Male                     | <b>Date of Birth*</b>         | 01/04/1980                          |
| <b>Disclosure Opt-out</b> | <input type="checkbox"/> | <b>Date of Birth Verified</b> | <input checked="" type="checkbox"/> |
| <b>Partnership Status</b> | Married                  | <b>Previous Surname</b>       |                                     |
| <b>Spouse Initials</b>    |                          | <b>Spouse DofB/ DofD</b>      |                                     |
| <b>Date of Marriage</b>   |                          |                               |                                     |
| <b>Checked</b>            | Data Checked             | <b>Checked By</b>             | IND                                 |
| <b>Checked Date</b>       | 07/04/2017               |                               |                                     |
| <b>Member Number</b>      |                          | <b>Ident 2</b>                |                                     |
| <b>Ident 3</b>            |                          | <b>Scheme*</b>                | -- Select --                        |
| <b>Employment</b>         |                          |                               |                                     |

If the data you have provided cannot be verified the following message will be displayed.

### Information

The details entered do not match to the member. Please contact your pensions administrator for more information.

In this instance it is likely that the verification cannot be matched with the details held by the Pensions Team, therefore please call us on 0845 602 7237 and we can investigate further.