



Uploading member forms on i-connect

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Introduction

i-connect is an employer portal used to send member information to Lothian Pension Fund every month. We can now receive member specific documents through i-connect and the following guide will talk you through how to do this.

Log into i-connect using the following link https://app.i-connectdata.co.uk/web_front_end/ Your username will be set by us and sent to you in an email directly from i-connect with a link for you to set your password.

Your i-connect account is for your use only, if someone else in your organisation requires access, please contact us at employer.pensions@lpf.org.uk Please also email us if you need a password reset.

What documents will I be uploading?

The following forms should now be uploaded through i-connect:

- Retiral forms
- Early leaver forms
- Letters of authority
- Ill health certificates
- Death in service forms
- Death certificates
- Secure messages
- Individual estimate requests
- Individual opt outs refunded through payroll
- APC applications

The new functionality in i-connect is member specific meaning that uploads relating to multiple members should still be uploaded to Go Anywhere. These include:

- AB1 forms
- Bulk estimate requests
- Bulk leaver exercises
- Compliance certificates
- Replies to requests from us including employer queries, Annual Allowance pay requests and year end queries

We'll continue to let you know when we have uploaded something to Go Anywhere for your attention.

Member search

As per the current process, you should complete the form using the template from the Guides and Forms folder in Go Anywhere. For ease, we recommend that you download a copy of the forms you need and keep them in your own drive.

Best of the last 3 years and certificate of protection (pays required) have now been added to the back of estimate, leaver, retiral and death in service forms. If required, this should now be filled in as part of the form meaning there is no need to send as a separate spreadsheet upload.

Once logged in to i-connect, you'll see a Member Search box on the top tab. Type in the member's national insurance number.

You'll see the screen below.

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Lothian-Test : Enter Full NI Number ... **Member Search**

Member Search

1 result(s) for

Employer Name	Payroll Name	Payroll Reference	Period End Date
Example employer	Example payroll	1085	30 November 2021

Upload Active Member Documents **Upload Leaver Documents** **View Document History**

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'Pension reference'

You can see all the documents already uploaded for this member record by clicking into 'View Document History'

If the member has more than one active employment within your organisation, the screen will list all the active records we hold.

You can identify the correct record using the 'payroll reference' which refers to the pension reference you use. Once you've identified the correct employment, you're ready to upload your document.

Uploading a document for an active member

Click 'Upload Active Member Documents' to send the following documents:

- APC application
- Estimate request (individual member request)
- Secure message (relating to an active employee)

Upload Active Member Documents ✕

You are about to start uploading active documents for member **1085**. linked to Payroll Reference

Step 1- Select Reason

Reason for Active

- Please Select Reason For Active...
- APC Application
- Estimate request
- Secure message

Select from the drop down list which type of document you're uploading.

Upload

Upload Active Member Documents ✕

You are about to start uploading active documents for member **1085**. linked to Payroll Reference

Step 1- Select Reason

Reason for Active

Step 2- Add Documents

All documents must be attached to before you can proceed

Estimate request **Choose Files**

Upload

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Once you have selected the reason in Step 1, a button to choose your file will appear at Step 2.

Click 'Choose files' to search for the document in your own drive. Double click on the document in your folder and the document name will appear in the box. Hit 'Upload'.

A processing message will appear.

Lothian-Test : [Payroll Dashboard](#) [Member Search](#)

Member Search

 Member document(s) submission is being processed. To check the status of your submission, click here to view [Document History](#).

1 result(s) for

Employer Name	Payroll Name	Payroll Reference	Period End Date
Example employer	Example payroll	1085	30 November 2021

Once the form upload is complete, a line will be added to the member record's document history. You can view all uploaded documents by clicking 'View Document History'.

View Document History ×

Complete document upload history for member linked to Payroll Reference **1085**.

Document	Reason for Upload	Uploaded By	Date Uploaded	Document Status
Estimate request	Estimate request	SarahReid	2021-12-06	COMPLETE

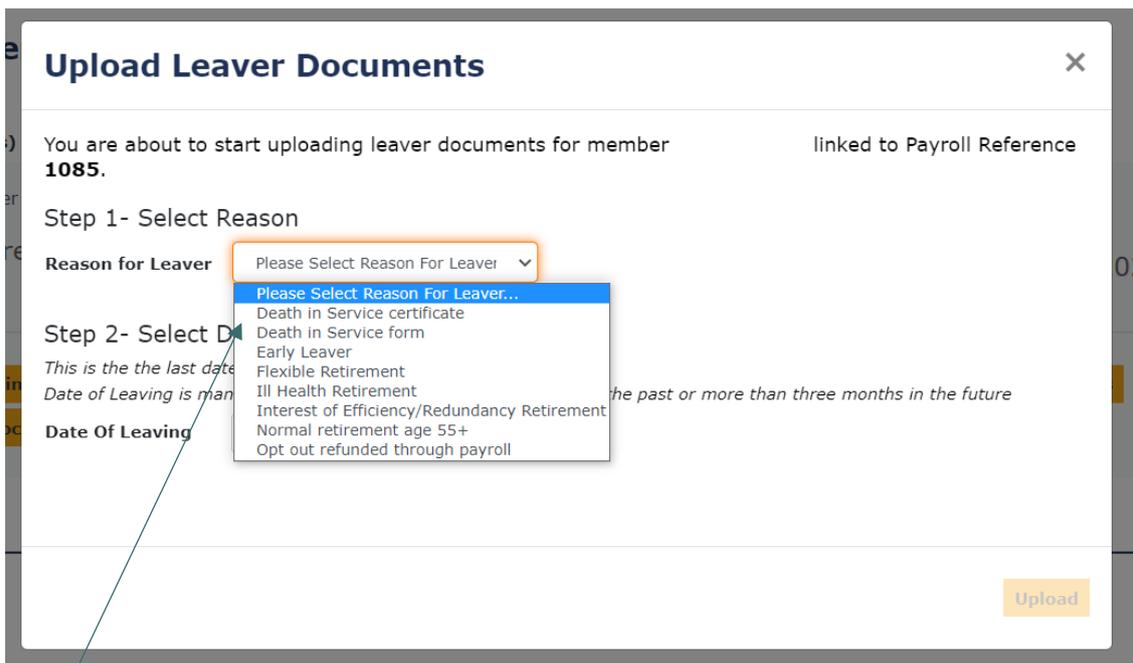
The form has been successfully sent to us when the status is 'complete'

Uploading a document for a member who is leaving

Click 'Upload Leaver Documents' to send the following documents:

- Retirement form
- Early leaver form
- Death in service (form and certificate)
- Opt out refunded through payroll (individual members only)
- Secure message (relating to an employee who is leaving)

On the dropdown, different types of retirements are listed. It's important to choose the correct retirement reason as i-connect will advise all documents that need to be uploaded.



The screenshot shows a web interface titled "Upload Leaver Documents" with a close button (X) in the top right corner. Below the title, it states "You are about to start uploading leaver documents for member 1085." and "linked to Payroll Reference". The interface is divided into two steps: "Step 1- Select Reason" and "Step 2- Select Date". Under "Step 1- Select Reason", there is a dropdown menu labeled "Reason for Leaver" with the placeholder text "Please Select Reason For Leaver". The dropdown menu is open, showing a list of options: "Please Select Reason For Leaver...", "Death in Service certificate", "Death in Service form", "Early Leaver", "Flexible Retirement", "Ill Health Retirement", "Interest of Efficiency/Redundancy Retirement", "Normal retirement age 55+", and "Opt out refunded through payroll". Under "Step 2- Select Date", there is a label "Date Of Leaving" and a text input field. The text "This is the the last date" is partially visible on the left, and "the past or more than three months in the future" is partially visible on the right. An "Upload" button is located at the bottom right of the interface.

Select from the drop down list which type of leaver you are sending documents for.

Upload Leaver Documents X

You are about to start uploading leaver documents for member **1085**, linked to Payroll Reference

Step 1- Select Reason

Reason for Leaver: Flexible Retirement

Step 2- Select Date Member Is Leaving

*This is the the last date the member is employed.
Date of Leaving is mandatory and cannot be more than one year in the past or more than three months in the future*

Date Of Leaving: 31-12-2021

Step 3- Add Documents

All documents must be attached to before you can proceed

Retiral Form: Choose Files RETIRAL FORM.docx

Letter of Authority: Choose Files LETTER OF AUTHORITY.docx

Upload

Once you've selected the reason for leaver, input the date of leaving at step 2.

Click 'Choose files' and navigate to your own drive to select the document. Double click on the document in your folder and the document name will appear in the box. Once all mandatory documents are attached, click 'Upload'.

A processing message will appear.

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Lothian-Test Payroll Dashboard Member Search

Member Search

ⓘ Member document(s) submission is being processed. To check the status of your submission, click here to view Document History.

1 result(s) for '

Employer Name	Payroll Name	Payroll Reference	Period End Date
Example employer	Example payroll	1085	30 November 2021

Once the form upload is complete, a line(s) will be added to the member record's document history.

The screenshot shows a window titled "View Document History" with a close button (X) in the top right corner. Below the title bar, it says "Complete document upload history for member linked to Payroll Reference 1085." Below this is a table with the following data:

Document	Reason for Upload	Uploaded By	Date Uploaded	Document Status
Letter of Authority	Flexible Retirement	SarahReid	2021-12-06	COMPLETE
Retiral Form	Flexible Retirement	SarahReid	2021-12-06	COMPLETE

Two blue arrows point from the "COMPLETE" status cells in the table to a callout box below. The callout box contains the text: "The forms have been successfully sent to us when the status is 'complete'".

Mandatory uploads for leavers

In the example screenshot above, the member is retiring under flexible retirement, therefore a retiral form and letter of authority must be uploaded.

A letter of authority must be uploaded for:

- Flexible retirements
- Interest of efficiency/redundancy retirements

An ill health certificate must be uploaded for all ill health retirements.

As a death certificate may not be immediately available, death certificates are not a mandatory upload for a death in service. In the drop down list you can choose to upload the death certificate when it becomes available, this shouldn't hold up sending the death in service form.

Amended forms

If there is a problem with a form submitted, the fund will ask for another copy of it. On the dropdown please select 'Secure message' to upload the revised form.

If you require any assistance, contact us at employer.pensions@lpf.org.uk