

# New joiners with start dates in a previous scheme year: How to notify WMPF

## May 2024

We have introduced a new monthly submission validation (60176) that **prevents new joiners from being submitted if their start date is in a previous scheme year** (for example if you are attempting to submit a new joiner with a March 2024 start date on your April 2024 file). This validation is important because it will prevent members' CARE benefits from being over- or understated when the annual revaluation is applied.

**If you are currently unable to submit your April file because you have new joiners that started in the 2023/2024 scheme year you will need to submit an Admin Referral case to us.** Please provide the member's details (a copy of the line of data that is included in the monthly submission file would be ideal) along with a split of the earnings so that they can be allocated to the correct scheme year. We will create the new joiner record and send the membership number to you so that your monthly data file can be submitted. We kindly request that you *do not remove* the member from the monthly data file and then submit it without them. **Please wait to receive the new joiner reference number before attempting to submit your file.**

When submitting the total earnings and contribution data from the member's start date to the end date on the monthly data file, please ensure that column S (contribution start date) is the first day of the month and column T (contribution end date) is the last day of the month to avoid triggering a further validation failure.

*Please note:*

- ⇒ *This advice will be relevant in all subsequent months where you have new joiners with a start date in the last scheme year.*
- ⇒ *The validation that prevents you from submitting historic joiners with start dates more than six months before the file effective date will still apply. Please continue to submit joiners of this type to us using an Admin Referral case.*

**Remember to remove the joiner information (i.e.) *Date joined scheme, Joiner flag 'Y'*, and other mandatory joiner information from the monthly data file prior to submission. Remember to include the new pension reference number that will have been supplied to you by our Data Team once the record has been created.**

## Example

You need to submit your April 2024 monthly data file, but a member joined the scheme 25/03/2024 and was not included in your March 2024 monthly data file.

An employer-level Admin Referral case needs to be submitted to us that includes all relevant joiner information that would usually be included in your data file. Ideally this information should be sent to us as a row of data in Excel in the same format as it would be submitted on your monthly data file:

- ⇒ National Insurance Number
- ⇒ Full name (including title)
- ⇒ Gender
- ⇒ Date of birth
- ⇒ Address (including postcode)
- ⇒ Unique payroll reference number
- ⇒ Job title
- ⇒ Scheme section (50/50 or Main)
- ⇒ Employee contribution rate
- ⇒ Contracted weekly hours
- ⇒ Weekly standard hours
- ⇒ Date of scheme admission
- ⇒ Casual (Y or N)
- ⇒ Actual annual pensionable pay
- ⇒ Full-time equivalent annual pay
- ⇒ Employee type

Along with:

- ⇒ A split of the earnings and contributions that need to be allocated into the March and April scheme years, for example:

March				April			
Main section pay	Employee contributions	Employer contributions	FTE Pay	Main section pay	Employee contributions	Employer contributions	FTE Pay
450*	30*	90*	23,463*	2000*	150*	450*	26,070*

\*Figures are for illustrative purposes only

Submit the Admin referral case and wait for the new membership number to be returned to you.

On your April 2024 monthly data file:

- ⇒ Ensure that the new membership number is included against the member.
- ⇒ Remove any mandatory new joiner data that may make your file fail validations (for example, date joined scheme and the new joiner flag 'Y')
- ⇒ Ensure that the contribution start and end dates (columns S and T) are 01/04/2024 to 30/04/2024
- ⇒ Put the member's *total* earnings and contributions from their start date (25/03/2024 to 30/04/2024).

In this example, the amounts would be

- Main section pay £2500
- Employee contributions £188
- Employer contributions £570

Submit your April file as normal.

Please note that the dates and figures included above are for illustrative purposes only. Please apply the above guidance as appropriate to your own requirements.

For guidance on how to submit an Admin Referral please see page 25 of our [Full ESS Guide](#).