

### Admin Referral workflow – submitting your final statement

The *Admin Referral* workflow in ESS allows you raise a query securely with the Fund. Any documentation with sensitive data should be submitted through this workflow.

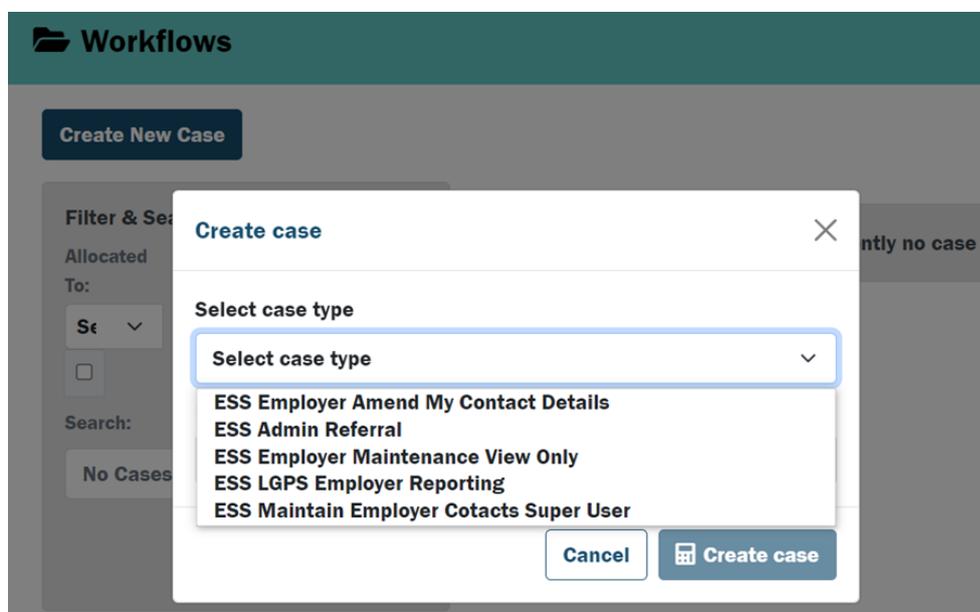
We are asking for your 2024/25 final statements to be submitted via this workflow.

### Final statement requirement reminder

- Final statements will only be accepted in the [Fund's format](#).
- Final statements *must* be submitted as the Excel version (accompanying signed PDFs will be accepted but *cannot replace* the Excel version).
- One final statement per scheme employer must be submitted, i.e., if you are an academy chain with five academies in the scheme, five final statements must be submitted.
- The deadline for submission of your final statement(s) is 30/05/2025.

### Starting the Admin Referral workflow

Start an *Admin Referral* workflow by selecting the “Create New Case” option in the *Workflows* tab and selecting “ESS Admin Referral” from the drop-down menu.



At this point you will need to enter a case title:

**Please enter the case title in the format *Final statement year end 2025 (employer reference number)***

For example: *Final statement year end 2025 employer 1234.*

Clicking “Create Case” will create a new *Admin Referral* case which will need to be picked up from the *Workflows* case list.

The screenshot displays the 'Workflows' section of a system. At the top, there is a teal header with a folder icon and the text 'Workflows'. Below this is a dark blue button labeled 'Create New Case'. The main area contains a 'Filter & Search options' panel with three dropdown menus for 'Allocated To', 'Case Type', and 'Status', each with a 'Select...' label and a search icon. Below these is a search input field containing the text 'No Cases Found', with 'Clear' and 'Submit' buttons. Underneath is a 'Sort by' section with two buttons: 'Newest first' (with an upward arrow) and 'Oldest first' (with a downward arrow). A blue button labeled 'Reallocate Case...' with a person icon is positioned below the sorting options. The bottom section features a white card titled 'ESS Admin Referral Workflow' with the following details: 'Final statement 2023/2024 Employer 9997', 'Non member' (with a person icon), a table with 'Case ID' (210814) and 'Assigned To' (BATCKEMPLOYER1), and 'Start Date: 1 March 2024'. A red arrow icon is next to the assigned user, and a red button with a bell icon and the text 'Action Required' is at the bottom right of the card.

Clicking on the relevant case will launch the workflow. You can then follow the steps below.

1. When you launch the workflow you will be given a brief description of what the workflow is for. This will also display the Case ID. **Please record this case ID for your records, as this is how individual final statements can be identified if they need to be queried by the Fund.**

## Case ID : 112622

**Start Employer Workflow**

### Workflow Information

This workflow allows you to raise a query with the admin team. This could be a general enquiry or a query which relates to a member. You will be able to upload documents as part of the process.

**Refresh** **Next**

2. To submit your final statement:

Select the relevant employer from the Employer drop-down menu.

Select “Employer Case” from the *Employer or Member level* drop-down menu.

Do not enter any data in the *Identity Check* fields.

Select “Search if Member or proceed for Employer” from the *Select Action* drop-down menu.

Click “Submit” to move the workflow onto the next stage.

**Admin Referral Workflow - Identity Verification Inputs - Employer: 9997**

**Employer**

Employer\*  
9997 - DEXTERS LTD

**Member (If relevant)**

Employer or Member level? \*  
Employer Case

**Identity Check (Min 1.00 items required)**

Member Number

Forename

Surname

NI Number

Date of Birth

1st Line of Address

Postcode

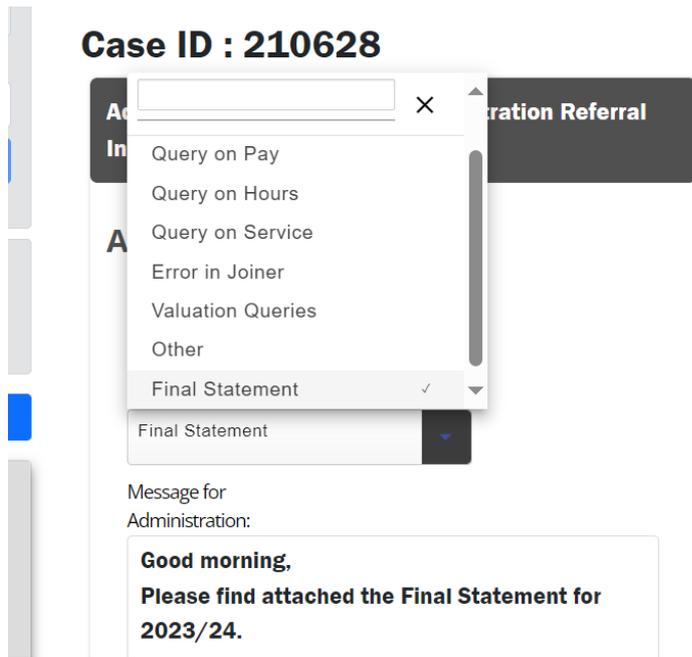
**Process Option**

Select Action \*  
Search if Member or proceed for Employer

**Refresh** **Submit**

3. On the next screen select “Final Statement” from the *Reason for Referral* drop-down menu so that the case can be allocated to the appropriate WMPF team.

In the *Message for Administration* box please inform us that you are submitting your final statement.



Upload your final statement onto the Admin Referral by clicking “Choose File” and navigating to the appropriate file in its saved location.

The *File Title* should be in the same format as the *Case Title* above, i.e. *Final statement year end 2025 (employer reference number)*.

Important: Final statements *must* be submitted as the Excel version (accompanying signed PDFs will be accepted as a second file but *cannot replace* the Excel version).

**Attach Documents**

If Uploading a Document Please Enter a Title.

File 1 to Upload:  
**Choose File** No file chosen  
File 1 Title:

File 2 to Upload:  
**Choose File** No file chosen  
File 2 Title:

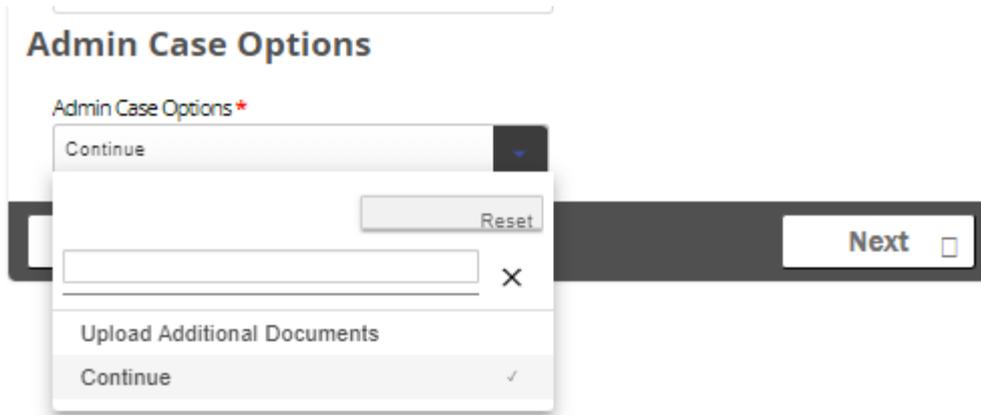
File 3 to Upload:  
**Choose File** No file chosen  
File 3 Title:

**Admin Case Options**

Admin Case Options \*  
Continue

**Refresh** **Next** □

- Once you have entered your message to the Fund as above and have uploaded the Final statement to the case, please select “Continue” under “Admin Case Options” and click “Next”. The query will then be sent to the Fund.



### Queries returned by the Fund

Once your Admin Referral query has been assessed by the Fund, and necessary actions taken, it will be returned into your Workflows tab. You can open this to view the Fund’s response by clicking on the case tab.

#### Case ID : 210814

**Admin Referral Workflow - Employer Review Response - Employer: 9997**

### History

Administration Referral History:  
 MessageHistory.pdf

### Admin Response:

Admin Response:

**Good afternoon,**  
**I can confirm receipt of your final statement. Please close this workflow as no further action is required from you.**  
**Kind regards**  
**WMPF Team**

### Attach Documents:

If Uploading a Document Please Enter a Title.

File 1 to Upload:  
**Choose File** No file chosen  
File 1 Title:

File 2 to Upload:  
**Choose File** No file chosen  
File 2 Title:

File 3 to Upload:  
**Choose File** No file chosen  
File 3 Title:

**Message for Admin:**

Message:

**Admin Review Options**

Employer Case Options\*

None Selected

Refresh Next

You can open the case by clicking on it, which will open the above page. Our response will be located under “Admin Response”.

If the Final Statement has been accepted you will receive a message similar to the above. You can then select “Query Resolved” under “Employer Case Options” to close the case.

**Admin Review Options**

Employer Case Options\*

None Selected

Reset

Query Resolved

Refer Back to Administration

View Documents

Next

If the message indicates a response is needed, you can respond to us through the case.

You can download the *MessageHistory* PDF by clicking on it. This displays a list of all messages sent during the case.

The Admin Response message will indicate if we have attached any documents to the case.

You can view attached documents by selecting “View Documents” under “Employer Case Options” and clicking “Next”.

You will be invited to choose a document to view. You can choose which document to view by selecting it in the “Document” drop-down menu, then clicking “Continue”.

### Case ID : 210814

**Admin Referral Workflow - Select a Document to View - Employer: 9997**

**Select a Document to View:**

Document: \*

None Selected

Reset

4ab3af06-a4c1-471f-a0df-1793e52eaa1a\_Message Report

e8ca0ee2-6581-4d48-bfb6-439093c4c444\_Final Statement 23

24 Employer 9997

690d82a5-7155-4a0f-97e3-8ad84e2c4085\_Final statement - queries highlighted

The document will then be made available for you to download and view.

**Admin Referral Workflow - Display Document - Employer: 9997**

**Click the link to access the document:**

Downloaded Document

 Final statement queries.xlsx

**Do you want to view another document?**

Option: \*

No

Refresh

Continue

You can view another document by selecting “Yes” from the “Option” drop-down and clicking “Continue”. This will return you to the “Select a Document to View” page. Alternatively, you can select “No” and then “Continue”, which will return you to the “Employer Review Response” page.

**Message for Admin:**

Message:

**Admin Review Options**

Employer Case Options\*

None Selected

Reset

Next

Query Resolved

Refer Back to Administration

View Documents

If you have further queries for us or we require a response, you can type a message in the “Message for Admin” box, then select “Refer Back to Administration” under “Employer Case Options” and click “Next”. This will return the query to us. This can be done multiple times until the query is resolved.

If query has been resolved to your satisfaction, you can select “Query Resolved” in the “Employer Case Options” drop-down, then click “Next”. This will close the Admin Referral workflow.

**Case ID : 127792**

**Robot Step**

Step is completed.

Refresh