May 2025 REF - Employer Q and A

Interface and Employer Portal

Q: What about employers who do not have access to their interface and this sits with their payroll provider?
A: If your payroll provider sends the interface, we will validate it to create the Data Validation Failure report. That report will be sent to the payroll provider and you as the employer, so you have sight of the errors and warnings generated.

Q: Can the employer see the interface submitted by a shared service in the Employer Portal?
A: The employer will not be able to see the interface that has been submitted but will receive a copy of the resulting Data Validation Failure report or confirmation that all data has been added to the record.

Q: Will both employers and shared services be able to track the cases
A: From 1 December 2025, you will have visibility as you will receive a copy of the Data Validation Failure report. More functionality will be released in March 2026, which will give you the ability to track cases. Information on these tools will be shared in October 2026.

Q: The November interface is sent mid December, will that be sent to Capita?
A: All files and interfaces will be sent to Capita via the Employer Portal from 1 December 2025 onwards.

Q: Will the manual interface remain unchanged?
A: Yes.

Q: Is that both the standard and the manual interface files that are not changing or just the standard?
A: Both the manual and standard interface files are staying the same.

Q: CGI submits our interface. How will that process work for the DVR report? Additionally, we manage other organisations; how will that be handled?
A: If your payroll provider/shared service (CGI) sends the interface, we will validate it to create the Data Validation Failure report. That report will be sent to the payroll provider and you as the employer, so you have sight of the errors and warnings generated. Where there are multiple employers in a single file, each employer will receive a Data Validation Failure report that is specific to them. Employers will not be able to see other employers' data.

Q: Our payroll provider is concerned about individual logins for the Employer Portal, will individual logins be the only way to access?
A: Payroll providers/shared services will have a single 'data centre' where they can manage their own users and all of the employers that use them. When they are doing work for one of their employers, they will select that employer so they can access member data based on the permissions for the employer.

Q: Will payroll providers have to log in separately to different employer accounts to upload interface files, or all via one account?
A: Payroll providers/shared services will have their own Portal account. If a payroll provider/shared services provider sends information for multiple employers, they will need to log in once and select the correct employer in order to upload the interface file. In the first instance, employers who use a payroll provider/shared services will be asked to nominate the appropriate provider so that provider can upload the appropriate interface files through their own Portal account.

Q: How have you engaged with payroll software providers? Particularly around the interface file submission?
A: We have engaged with payroll software providers through the Pensions and Software Suppliers Engagement Group of suppliers that work with Public Sector Pensions. However, if you believe your provider is not part of that group please ask them to contact us via our online feedback form.

Q: Can you have more than one super user?
A: Yes, you can have as many super users as required.

Q: New Capita portals - will the employer and member users have separate profiles?
A: The two Portals will be completely separate. For individuals that qualify for both, they will have separate login details, one as an employer and a separate profile as a member of the pension scheme.

Q: If we use a mail management system and a single email address to receive employee queries and DR1s, how will this work with the Employer Portal?
A: The Employer Portal works on the same basis with a group mailbox for each employer. This employer mailbox will hold all incoming and outgoing messages allowing you to respond to these requests. The mailbox can be accessed by all users as set up by the super user. The same applies for Shared Service and Payroll provider accounts.

Q: How will Capita know who the super user is to email for initial access? Will they get that information from MyCSP or do we need to provide that to Capita?
A: We will collate this information before the training begins to ensure the correct people are contacted.

Q: What happens if our security team won't sign off access to the Portal to upload the interface?
A: Please contact us via our <u>online feedback form</u> with the requirements of your security team so we can provide the details they need to sign off.

Q: What are the contingency plans for employer interactions with Capita if employers aren't ready for go live on 1 Dec e.g. internal security clearance not agreed?

A: If you have any specific concerns about this, please contact us at
<u>cspsevents@capita.com</u>

Q: Is the Portal just a case management system, or is it also access to the members records? Can you view their whole history, or just current employer.
A: The Employer Portal provides a way for you to submit interface files, send documents, communicate with us and view member records via Member Search. Security controls restrict the information you can see. If you currently employ a member or previously employed a member you will be able to see their service within your organisation. You will not be able to see any member's service history from other departments.

Q: What else can we do on the Employer Portal? Process new starters/leavers? Send Request For Services forms?
A: You can find more <u>Employer Portal information</u> on our Transitional Website.

Q: When viewing a member on the Employer Portal, will we be able to see historic communication about that member?
A: Historic communications between the member and the administrator will be transferred over to Capita. This information will not be available via the Portal but may be shared with an employer if it is needed and justified.

Q: Can other Employer Portal users see requests that have been made by shared services, i.e. to gauge requests and queries?
A: Employer Portal users will not be able to see the Portal account for shared services and vice versa. However, processes are being developed to ensure employers are kept in the loop on processes managed by their shared service.

Q: In the registration process for the Employer Portal, is the mobile number mandatory? What if we only wanted codes sent to our people by email
A: It is mandatory for registration to use mobile, but it isn't mandatory for Multi Factor Authentication.

Q: If someone won't put their phone number in the registration process, is it ok to leave it blank?
A: No, a phone number is required as part of the registration process.

Q: What if the incorrect National Insurance number (NINO) is in the system? How do we find the employee?
A: You won't be able to find the employee via Member search if the NINO you provide does not match. There will be a process in place to get support if you believe the details held are incorrect.

Q: We are a team of 15 people who pick up any case and don't want them assigned to individuals. How will this work on the Portal?
A: The Employer Portal will provide you with a group mailbox for the employer so you can continue to pick up any case.

Q: Is there scope to have queries on the Portal move between employers i.e. Other Government Department transfers?
A: This is not a feature of what we are building for 1 December 2025.

Q: Employer Portal looks super user friendly THANK YOU.
A: Great, glad you like it.

Employer Processes

Q: What about changes to employer processes, we need more detail.
A: We understand that employers need to have confirmation on which processes will change and which will stay the same so they can inform their shared service or payroll provider. We are working hard to provide this as soon as possible.

Q: For those who use a payroll provider, we need to raise a multi-client change request, when will the requirements be shared to enable us to this? We need at least 6 months.
A: We understand that employers need to have confirmation on which processes will change and which will stay the same so they can inform their shared service or payroll provider. We are working hard to provide this as soon as possible.

Q: When will employers be provided lower level transition plans? We have less than 6 months and employers do have a lot of activity / action in advance of 1 December.
A: We understand that employers need to have confirmation on which processes will change and which will stay the same so they can inform their shared service or payroll provider. We are working hard to provide this as soon as possible.

Q: Our payroll provider is CGI, has Capita been collaborating with CGI?
A: Yes, following the REFs we are setting up contact with CGI. If you have a shared service or payroll provider that you believe we aren't talking to, please supply the providers name and contact details via our feedback section so we can start the conversation.

Employer Relationship Managers

Q: When will it be understood if there will be any changes to our Employer Relationship Managers as a result of the move to Capita?
A: We understand how important the ERM team is to employers and will continue to provide that support after 1 December 2025.

EPNs

Q: How will we receive notifications for comms actions once EPNs are discontinued?
A: EPNs are not being discontinued.

Workshops and testing

Q: Will there be any further Capita workshops and if so can groups be larger? Sessions appear to be booked up quick.
A: Yes, there will be further workshops. The best way to ensure you're included is to email cspsevents@capita.com and register your interest. We also have the ability to add you to our waiting lists. That way we monitor the demand and set up further sessions if needed.

Q: User and test groups - can employers be different for the groups, so wider range of views - and different types i.e. semi managed, shared service.
A: For any test groups or workshops, we always try to ensure a mix of employers are involved to capture a wide cross section of views and will continue to do so.

Website and contact information

Q: Once the transition to Capita takes effect, will the current email address for the contact centre be closed in order to avoid email submissions by employees?
A: Email will be replaced by secure messaging on the Member Portal.

Q: Will the employer website still be visible to members and the public e.g. EPNs and scheme guidance resources or will that be restricted to employers only by sign-on?
A: There will be a public website for employers, which can be accessed by members. However, any secure information will be available via the new Employer Portal.

Q: Will we lose the email address and employer helpline as a way of contacting the administrator?
A: We will still have an Employer Helpline, but the access code will be removed as that was seen as a barrier for contact. We will encourage all communications to be sent securely via the new Employer Portal.

Member comms and member portal

Q: Will information on a member's current Portal account move to a new Portal account, or will they need to download and save any information they want?
A: The following will be available for members from 1 December 2025:

- Annual Benefit Statements – From 2019 to 2025 for non-Remedy affected members and 2024 and 2025 only for Remedy affected members
- All existing pay slips and P60 information will be available for pensioner members
- All other member record data will be migrated from Compendia.

Q: Will there be no standalone central message from the Cabinet Office about the transition, this will effectively be 'drip fed' to members via existing comms opportunities?
A: We will increase communication to members about the transition from Autumn 2025 and we will share our communications plan with you. Currently, there are no actions for members to take, however communications about the new website, reregistering onto the new Member Portal from 1 December are in the plan as are messages to members who plan to retire this year.

Q: Will members be able to see shared service activities? For e.g. opt out form sent to Capita.
A: No, members will not be able to see the activities of shared services or employers. However, the next stage of Portal development will provide case tracking for employers and members so they can see how their case is progressing.

Q: AI models can be trained on actuarial rules and customized with scheme-specific logic. Will there be a comprehensive AI pension estimation tool for members?

A: We're utilising AI initially with our chatbot (planned for April 2026). There are no current plans to create a pension estimation tool using AI.

Mobile App

Q: Are there plans to update the CSPS app for Android, which is unavailable on newer OS and poor for those on older OS?

A: Yes, a new CSPS app will be re-launched for Android and IOS in March 2026.