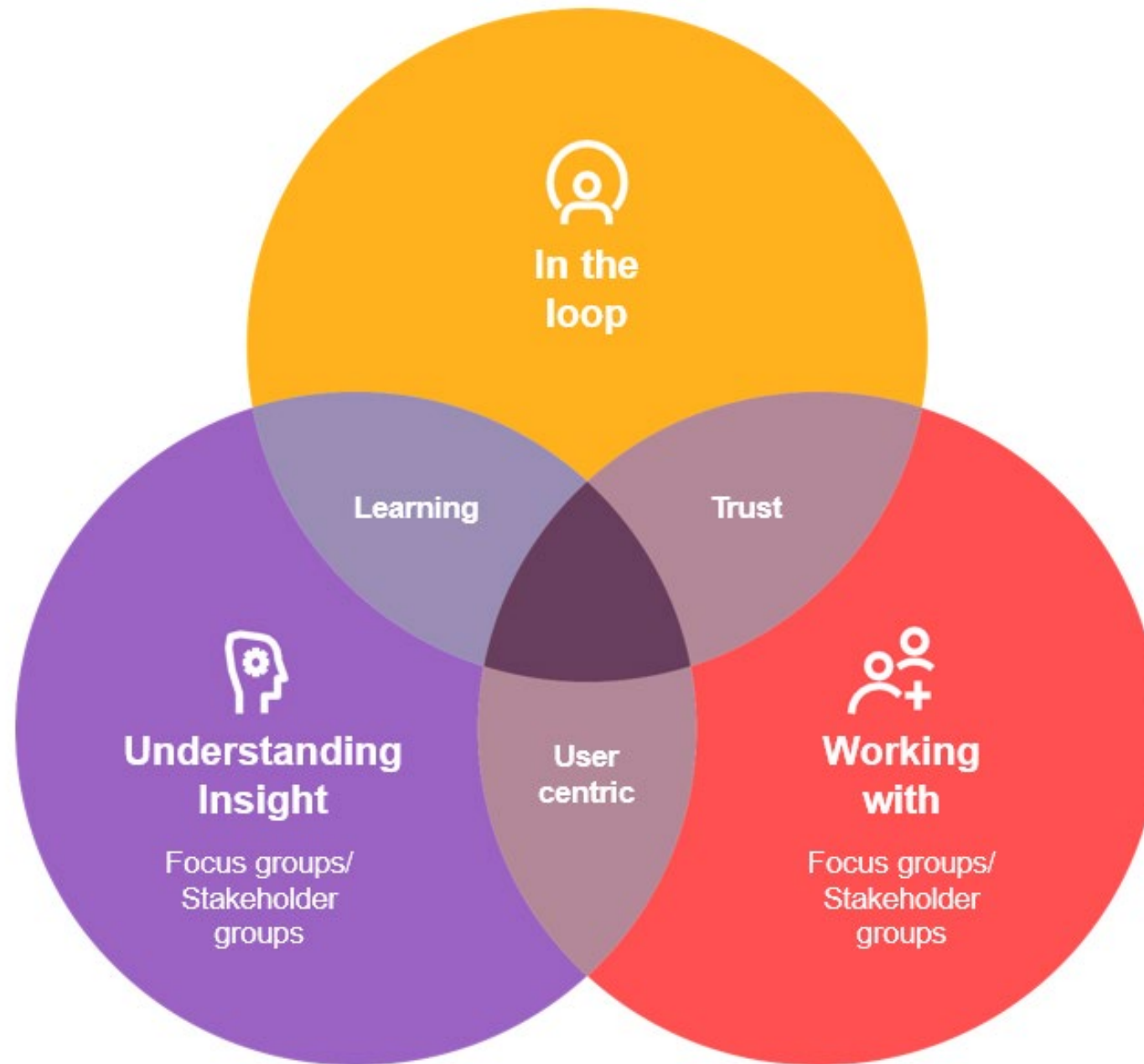




Capita Update

**Regional Employer
Forum**

November 2024



What we learnt? – Regional Employer Forum May 2024

What works well?

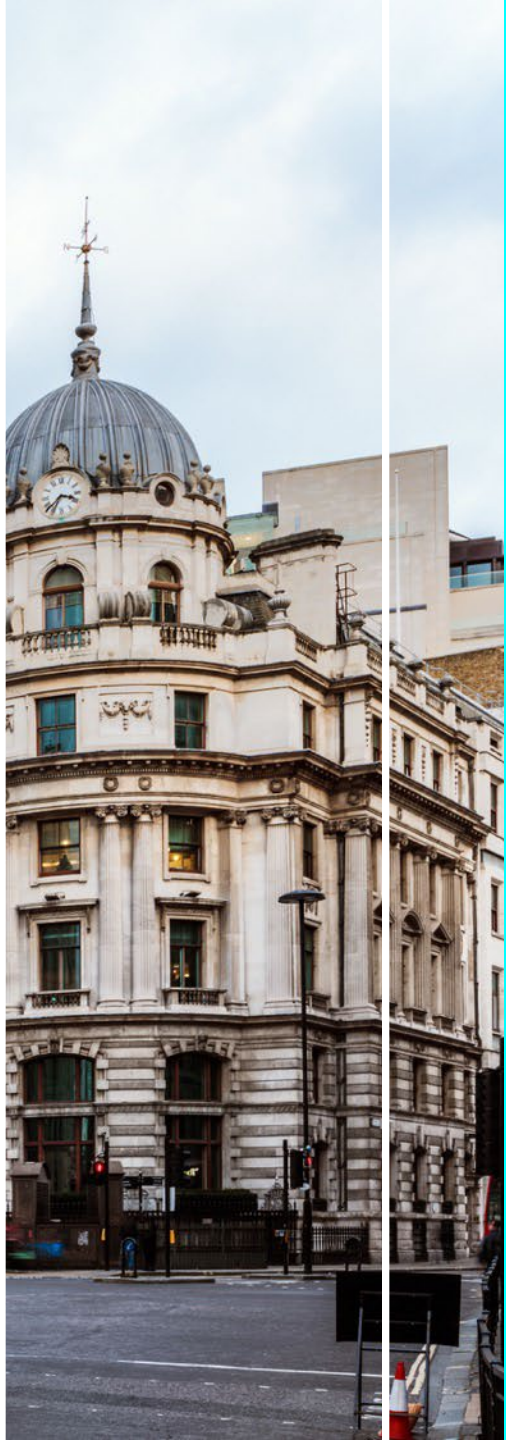
- Employer Relationship Managers
- Employer & Member Training Team
- Interface team
- Regional Employer Forum events
- Employer Helpline
- Employer Pension Notices (EPN).

What makes you different?

- Size
- Shared Services
- Security
- Members
- Access.

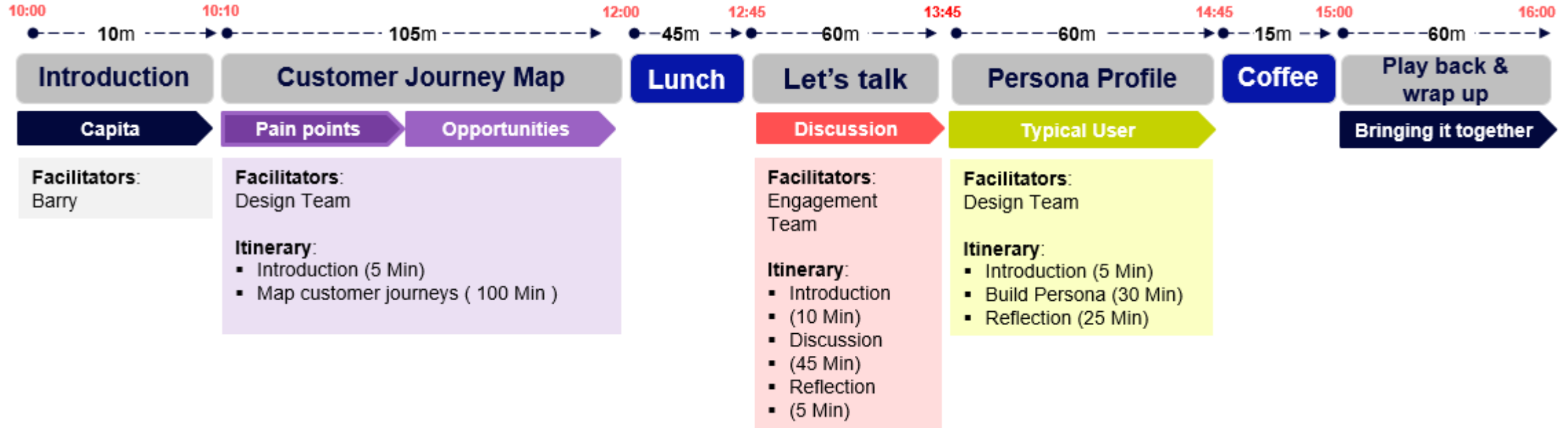
Biggest challenges

- Statement of Work
- Historical data issues
- Lack of information on tasks
- Response times
- DR1 process
- Complex processes
- Guidance on rarely completed tasks.



Employer Workshops

Employer workshops



Employer workshops summary

- 3 workshops
- 3 days
- 52 Employers
- Large employers
- Medium employers
- Small employers
- Shared services
- Retirement
- Task Management
- Dashboard.

Retirement journey plan mapping (three groups, 50 mins)

Part one

Journey maps:

- Visually represent user interactions with your service
- Help identify opportunities, streamline processes and drive better business outcomes

What's the current retirement process?

Example – Making a meal

Steps	Key actions a user takes at different stages	Choose meal	Buy ingredients	Chop vegetables
Channels	Platform / medium through which the user interact with your service. E.g. website, email, physical office, social media	Home or office	Supermarket website / shop	Kitchen
Documents	Materials & resources a user needs	Recipe book, website	Shopping list	Knives, chopping board
Actors	Person who performs key actions	Head chef	Chef's assistant	Chef's assistant

9

What we learnt? - Retirement

Retirement process from the Employers perspective

Pain Points

- Data on multiple platforms
- Accessing historical data
- Lack of communication
- Inaccurate information
- Unable to track progress.

Opportunities

- Data triage
- SLA transparency
- Improved DR1 process
- Online notification (not emails)
- Clear tracking.

What we learnt? – Task Management

How tasks are managed today

Pain points

Opportunities

What detail is important?

Must have

- Task ID
- Status
- Created date
- Audit trail
- Assigned to.

Nice to have

- Priority level
- Completion date
- Attachment
- Last update.

Won't have

- Task Name
- Task Description
- Sub task
- Task type
- Notes.

What we learnt? – Dashboard

Key information employers want to access

Top 5

- Task Board
- EPNs
- Member Search
- External service Tracker
- Notifications.

Bottom 4

- Training events
- Member marketing campaigns
- Calculators
- Member data.

What happens next?

Employer Workshops

- Microsite launch – December 2024
- Usability testing – prototype of core products – December 2024
- Employer workshops (Online) - January 2025 onwards
- Update at May 2025 REF
- User acceptance testing – more detailed testing of working systems – Q2 2025 onwards
- Training on new systems – TBC.

What are we building?

What are we building

Final sign off from
Comet required!

Tools to help you meet your responsibilities



Members

Employers

 Sign in or create account

▼ Menu



- **Employer Portal**
 - Access management
 - Password reset
 - Secure File transfer
 - Dashboard
 - Task Manager
 - Secure messaging.

First Login

Sign in to your account

Username

The username you chose when you created your account

Password

[Show](#)[Sign in](#)

▼ [New users of Civil Service Pension Scheme](#)

[Create an account](#)

▼ [I have forgotten my sign in details](#)

[Reset your password](#)[Recover your username](#)


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Sign in to your account

Username

The username you chose when you created your account

Password

 Show

Sign in

▼ [New users of Civil Service Pension Scheme](#)

[Create an account](#)

▼ [I have forgotten my sign in details](#)

[Reset your password](#)

[Recover your username](#)

Choose how you receive a six digit access code

Choosing your access code preference should take **about five minutes**.

You'll need:

Mobile phone, email access **or** a free authenticator app to receive your code

▼ [About the six digit access code](#)

This is an additional layer of security used to protect your account.

You'll receive a six digit access code every time you sign in. You can receive this code in different ways:

- SMS message
- Phone call
- Free authenticator app for smartphone, tablet or computer

This process lets you choose how you want to receive the code in future.

Continue >

How do you want to receive your access code?

You'll receive a six digit access code every time you sign in. Choose how you would like to receive this code.

☐ Phone

We'll send a code to your registered mobile or landline phone number. You can choose to receive it by SMS text message or voice call.

☐ Authenticator app

Only recommended for devices running iOS 15 or android 8.0, and up (or equivalent). A free authenticator app creates a code that you enter when you sign in.

▶ [Help with authenticator apps](#)

Continue >

How do you want to receive your access code?

You'll receive a six digit access code every time you sign in. Choose how you would like to receive this code.

☐

Text mobile number *****3628

We'll send a code by SMS message to your registered mobile phone number. You'll then enter that code to sign in

☐

Call mobile number *****3628

We'll call your mobile phone with an automated message. It will ask you to press the # key. Doing so will automatically sign you in.

Continue >

Check your phone

We have sent a six digit access code to your phone number ending in: *******3628**

It may take a few minutes to arrive.

The code will expire after five minutes.

It will be sent from 'msverify'.

Access code

▶ [If your access code has not arrived within 90 seconds](#)

Continue >

Cancel

Password Reset

Reset password for your account

Receive a link to reset your password

This should take **about five minutes**.

We'll ask you for:

- email address associated with your Civil Service Pension account
- your security answers

► [Your security answers](#)

Start >

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Your email address

Email address

The email address associated with your Civil Service Pension account

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Enter the answers to your security questions

The name of your first pet

Your oldest sibling's middle name

The make and model of your first car

[Continue >](#)

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Reset password email sent

Check your email. We have sent a link with instructions to reset your password.

► [If you do not receive an email](#)

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Your password has been reset

Choose your new password

Your password must have:

- at least 8 characters
- at least one number (0-9)
- at least one lower case letter (a-z)
- at least one capital letter (A-Z)
- at least one symbol (for example ?!£%)

Try not to choose a password you have used before.

 Show

Confirm your password

 Show

► [Need help creating a password](#)

Continue >

Password reset successful

You have now changed your password.

[Sign in to your account >](#)

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Username Reminder

Recover username for your account

Receive an email reminder of your username

This should take **about two minutes**.

We'll ask you for:

- email address associated with your Civil Service Pension account
- your security answers

You'll need:

- email access (to receive a password reset link)

▶ [Your security answers](#)

Start >

Your email address

Email address

The email address associated with your Civil Service Pension account

Continue >

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Enter the answers to your security questions

The name of your first pet

Your oldest sibling's middle name

The make and model of your first car

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Recover username email sent

Check either your **email** or **SMS**. Dependant on your digital notification preference made at registration the username will be sent a username reminder.

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Social Media

[!\[\]\(21226b58c700e5231ab98d27101bac58_img.jpg\) Facebook](#)[!\[\]\(097cdd6c9c875b64d9b8c9a2409491c4_img.jpg\) LinkedIn](#)[!\[\]\(f9f168a9979beed8b01f8750d577d508_img.jpg\) YouTube](#)

Questions?