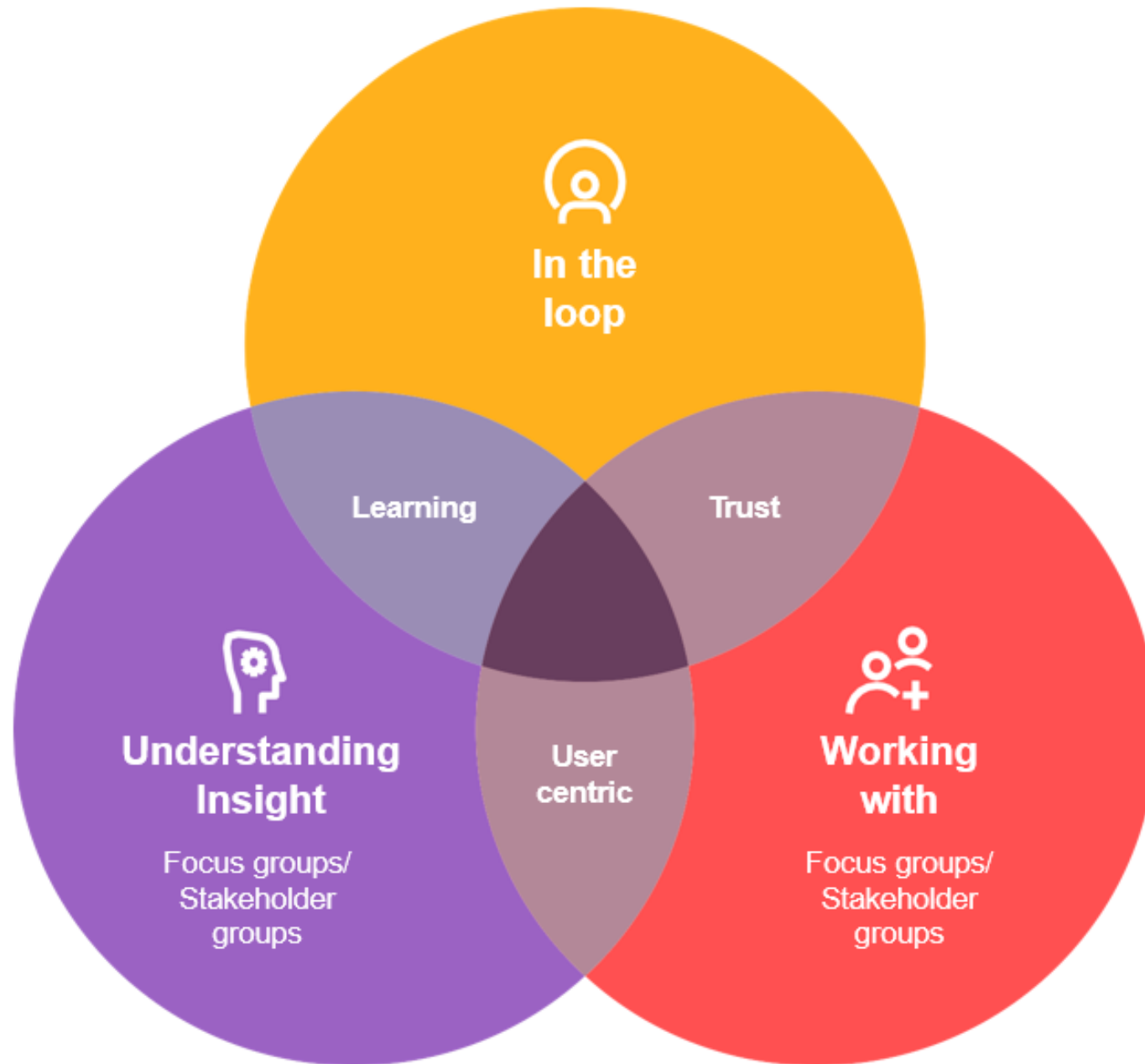




Capita update

**Regional Employer
Forum**

May 2025



Workshop updates

Employer workshop - March 2025 - Newport - Manchester - Edinburgh

Total participants: 44

Maps collected: 50

Tasks mapped: 18

Aim of the workshops:

1. Identify common employer and shared services tasks

Gain a clear understanding of the most frequent and critical tasks that employers or shared service teams perform in relation to pension scheme administration.

2. Uncover pain points in daily processes

Explore which parts of these tasks are most challenging or inefficient, including how frequently these issues occur and the level of frustration or impact they create.

3. Understand key metrics and information needs

Discover which performance metrics, data points, or insights are most valuable to participants in supporting their daily responsibilities and decision-making.

Employer workshops

Workshop	Finding
Task mapping – identify steps	<p>Most common tasks identified:</p> <ul style="list-style-type: none">• Retirement (partial, Ill Health)• DR1 forms• Interface upload• Statement of Work• Reporting.
Journey mapping – pain points identification and allocation	<p>Most challenging pain points has been identified as:</p> <ul style="list-style-type: none">• Inefficient communication• Historic data not held by Pension Administrator• Visibility of the process.
Journey mapping – metrics what do we need to measure	<p>Most common metrics identified:</p> <ul style="list-style-type: none">• DR1 data: volume of completion, type of queries, volume of failure, volume of outstanding, response time, turnaround times• Member: number of autoenrollment, number of sign in to the portal• MSD: number of queries/errors• Task: summary per category and priority, average time per task• Retirement: number of request submitted, forecast.

One-hour online workshops

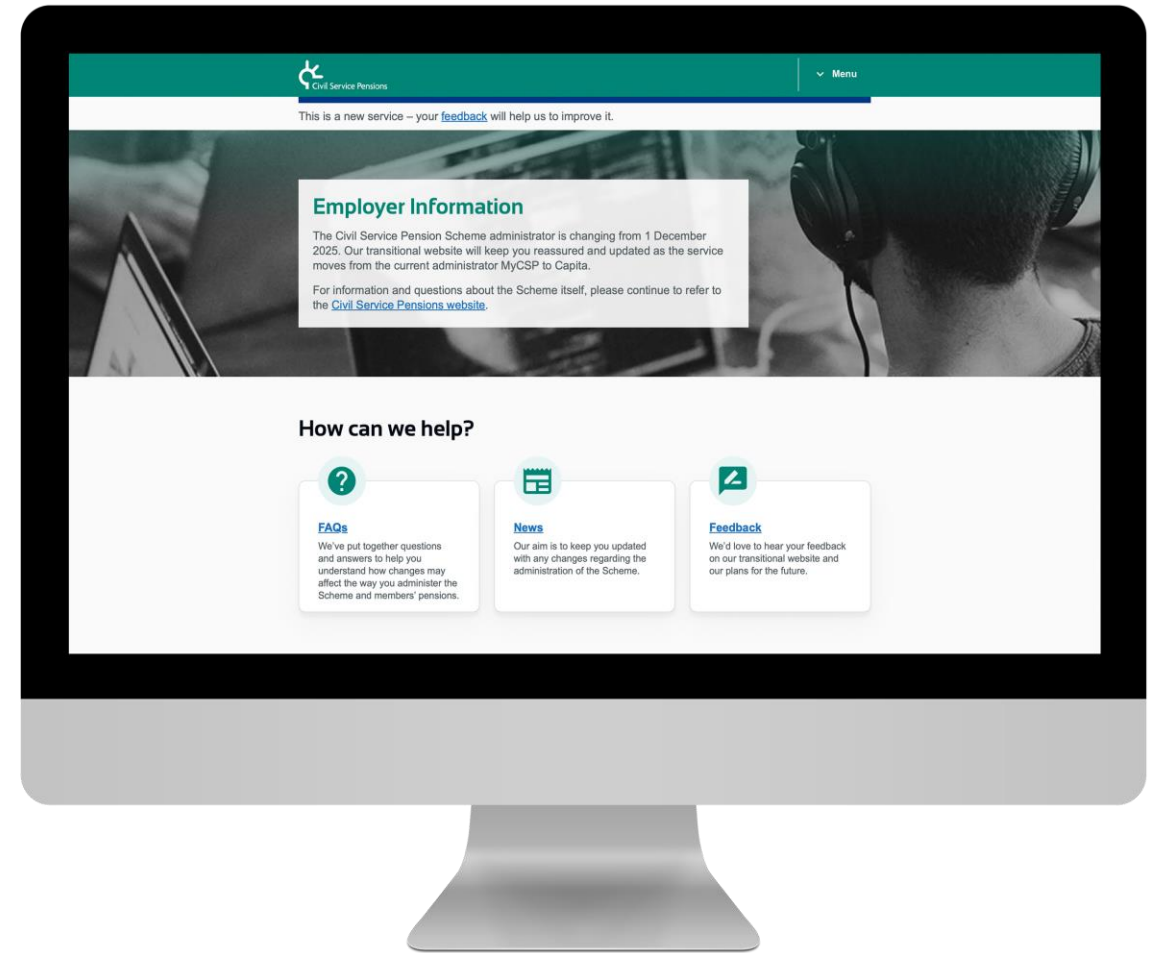
Workshop	Finding
Communications and EPNs	<ul style="list-style-type: none">• EPNS are very effective - would like them to be supported with member communications• Would like to avoid comms from multiple sources• EPNs should be on the secure portal to avoid member confusion• ERM support varies across employer.
Employer touchpoints	<ul style="list-style-type: none">• Document is clear, not too much detail with good flow diagram format• Difficult to locate on the website• Agreed with the decision to only publish confirmed information• Positive response on secure messaging in the Employer Portal• Further clarity required on shared services access to the Portal.
Transitional website	<ul style="list-style-type: none">• Most employers were aware of the Transitional website and had visited it• Majority happy with the content for now but more detail needed• Felt it was easy to use, navigation clear, and the website is consistent.

Usability Testing (UX) - Employers

Themes	Finding
Long wait times for MyCSP	Employers mentioned that a key issue is that members struggle to contact MyCSP leading to delays in resolving pension related queries. As a result, members turn to employers for answers.
A need for secure file transfer	Employers must send documents in specific formats which can add friction to the process. In addition, email is commonly used for document transfers which could have a compliance security risk.
Positive reception of task manager	Employers appreciated having a centralised view of tasks being received. In addition, the ability to assign and reassign tasks improves collaboration and efficiency. The feature was seen to be intuitive and seamless to use.
Access to member information & tracking of pension questions	Employers highlighted that their expectations of the 'search member' feature is to have better visibility into member details, and to be able to see statuses of their queries. This would stop them having to chase for updates on the members behalf.

Transitional website

- **News stories**
 - Confirmation of URLs
 - Employer and member portals
 - Workshop feedback
 - Regional Employer Forum
 - Assurance and accreditation document.
- **Employer Portal Guidance**
- **Workshop feedback**
- **What's changing – update to pages**
- **Member Toolkit**
 - FAQs.
- **Member transitional website launch**



What's Changing – update to pages
Online by 23rd May 2025

What's changing?

Interface data validation changes

Why are we changing validations?

- Enhance data quality
- Reduce the number of validation failures employers experience
- Help us maintain higher data quality for our members
- Fewer data requests to employers in the future.

What are we changing?

- Duplicate NINO: records cannot be updated for members if the NINO is already in use for another member
- Start Date for Salary/Allowance: the amount has not changed, but a new start date has been provided
- Added Years Contributions after 60th Birthday: contributions received after a member's 60th birthday.

When will these changes take effect?

- All validations will come in from 1 December 2025.

Statement of Works (SOWs)

SOWs – will they change?

- The format and content of the SOW document will change
- Process and what SOWs are used for will be largely unchanged.

New SOW Document – when will I see it?

- The new form will be added to the Transitional website as soon as possible.

New SOW process – When can we see it?

- The new process will be added to the Transitional website as soon as possible.

What is the cut-off point when I will start sending SOW requests to Capita?

- We're working with MyCSP and will confirm this date in due course. Until then SOWs should continue to be submitted in the normal way.

What happens with SOW's already submitted, that won't be completed by MyCSP?

- We're working with MyCSP to establish those that'll be outstanding on 1 December and will reach out to employers regarding these.

Employer Payroll Migrations (EPM) (inc Clusters)

How will they work?

- They'll follow the same approach as currently adopted by MyCSP but will be supported by us for any activity beyond 1 December.

Will the costs change?

- The cost basis will remain on a time and materials basis, and we'll provide a full breakdown of the costs as part of the SOW process.
- The costs will not be identical to MyCSP but are expected to be broadly aligned.

What happens if my EPM is already underway?

- We're working with MyCSP to establish those that will be inflight on 1 December and will reach out to employers regarding these.

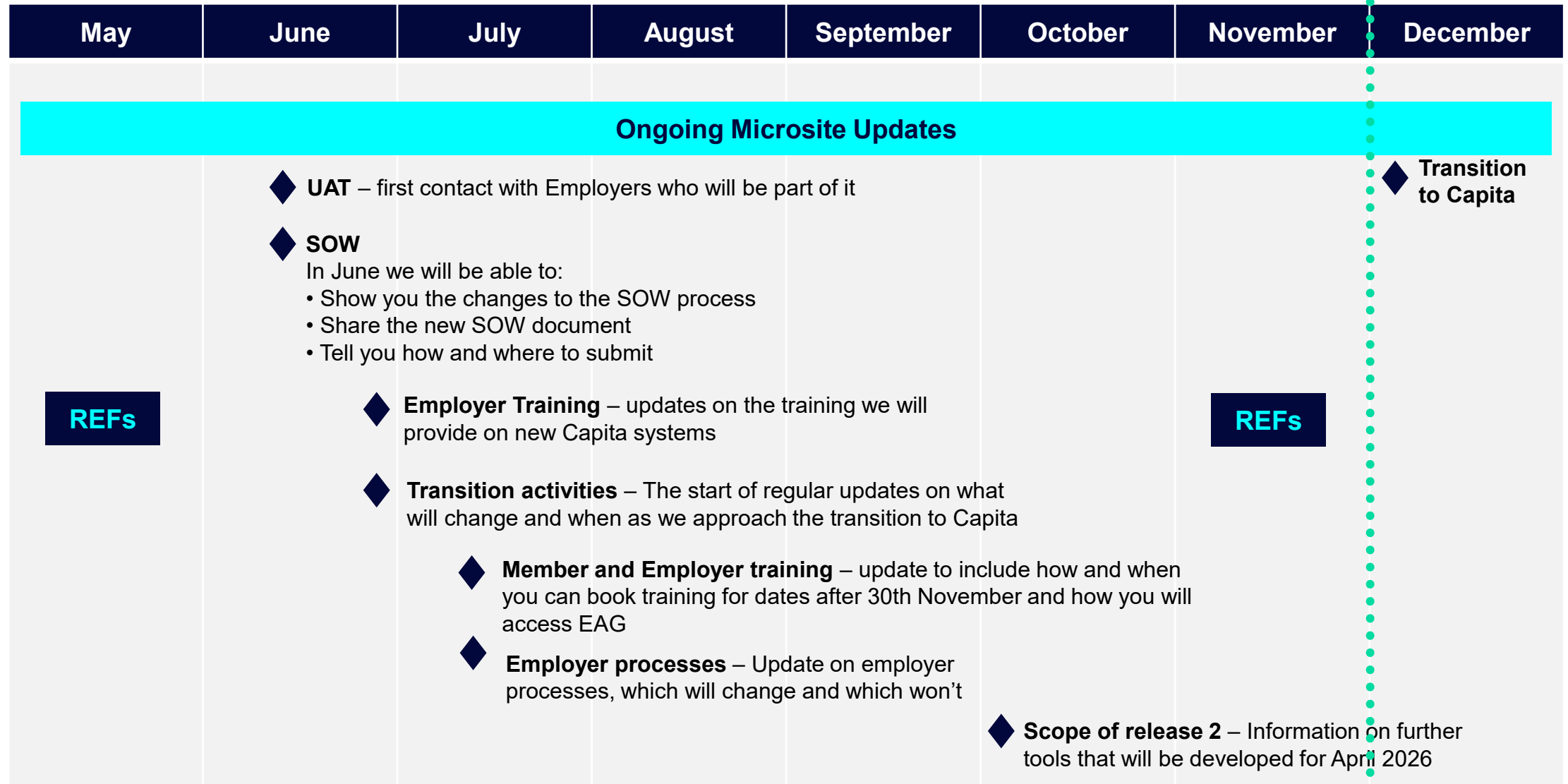
Who do I contact if I have an EPM that will start shortly before or shortly after day 1?

- Send it to MyCSP as soon as possible. We're working closely with the MyCSP EPM team to manage migrations that will bridge the transition date.

Timelines

Timelines

Transition Date
01/12/25



Employer Portal Demo

Q & A