

Online workshops
Employer Touchpoints
20 and 26 February 2025.

Highlights:

- Feedback on the document – Clear, not too much detail, liked the flow diagram format
- Difficult to locate the Employer Touchpoints document on the microsite. Link wording “Journey of the process” did not make it clear that this took them to Employer Touchpoints
- Agree with the decision to only publish information that won’t change
- Clarity required on shared services/payroll provider’s access and how tiered access might work across all users
- Employers would like more detail on most subjects but appreciate that may not be available yet
- Employers liked the idea of secure messaging via the Employer Portal to increase data security
- Expectation from some that forms would be digital processes, much happier when it was confirmed these aren’t changing yet
- Lots of requests for more visibility of member and employer processes via a track my case type system.

Overall Document:

- Clear, makes sense
- Understood the explanation for “To Be Determined (TBD)”
- Understood that document will grow as more information is available.

Employer Portal:

- Slide is too subtle. Employers understood after some explanation on the call
- Key area that didn’t come across - All employer forms will remain in their current format and will be submitted via the Employer Portal
- Employers are keen to see how Secure messaging will work
- Employers are keen to see what the Employer Portal dashboard/landing page will look like and what tools they will have access to
- All agreed access to member data will be a game changer
- How will employers know that messages have been received?
- One employer suggested that all their users are linked to a single email account mailbox so setting up accounts against unique email accounts will not be possible.

Interface process:

- Diagram is very high level so still generated additional questions on each step
- No objections to the process but more detail needed
- Employers asked how long it will take for the confirmation receipt and the error report to come back to them. Would they remain on the portal to receive it and respond or would they leave and come back the following day
- Questions on validations and if any will change – further workshops have covered this since
- What is Hartlink? Some employers felt it was useful for them to know as they are used to compendia, others felt it was jargon they didn’t need to be aware of
- Employers questioned how the error report will come back as the Data Validation Report goes back to the party that submitted the original interface file. One example was an employer uses a payroll provider, the provider submits the file each month, but they have agreed that the Employer will correct any errors, so both parties would need to see the error report



- What happens with Ad hoc requests?
- Will the current process for data more than 12 months old continue with Capita (currently via SOW), confirmed the current process will remain for now.

Registration process for the Employer Portal:

- Process makes sense
- Query on use of "username(s)" and password(s)" as suggested the access was being set up for many whereas this is the process purely for the first super user.

Access management for the Employer portal:

- How does super user access work – would benefit from a table showing access types and what they can do
- Suggestion that "Read Only" access could be useful
- User access journey will be very different for small employers. Some concern raised about the impact of not accessing the portal on a regular basis
- Confirmed access levels will be a subject for a future workshop with employers
- Payroll Provider raised concerns about having multiple pay points and how that will be handled.

Member process – non digital forms:

- Asked which forms were part of this process, suggesting the message is not clear enough
- Employers asked if they could see forms completed by members and what would the process be if a member submitted a form (presumably via the Member Portal) that required the employer to act
- Examples given of member completing Request for Services form on paper and sending to the employer could the employer then post to us. Confirmed the employer would need to take a copy and send the copy via the Employer Portal.

Poll feedback

What do you like about the document?

- Clear
- Straightforward
- Helpful
- Diagrams are clear
- Charts are simple
- Tables
- Flowcharts
- Simple format
- Clear responsibilities
- Easy to understand
- Logical
- Plain English
- Complicated.

What doesn't make sense?

- Detail
- Timelines
- Customisation
- User access.

What topics do we need to pay special attention?

- Employer
- Statement of works



- Management MI
- Details on the areas
- Status for employee
- Timelines
- GDPR
- Visibility
- Case status
- Data security
- Employee and employer
- SLAs
- User access
- Validations
- Messages process
- Firewalls
- Multiple payrolls
- CGI users
- Targets
- MyCSP
- Retirement.