Capita

Online workshops
EPNs and communications
Wednesday 19 and Monday 24 February.

Highlights:
- Employers would like information to be able to send it directly to members without having to prepare content and adapt
- Any comms to members needs to be shared in advance
- Communications are coming from multiple sources which makes it hard to ensure consistency
- MI reporting isn't consistent across employers
- ERM support varies across employers
- EPNs are highly affective but should be supported with member comms
- EPNs should be on the secure portal to avoid member confusion
- EPNs content should be reflected on website and throughout literature (Employer Guide)
- Employer (and member) guidance isn't always interpreted correctly, which can cause issues with inconsistency and inaccuracies
- Scheme calendar is useful for employers and should be updated.

Employer communications:
- Employer insights - Sent from ERM team with highlights
- Matrix (guide)
- Employer training - Sent from ERM team
- EPNs which highlight an action is needed
- Live at lunch (outside of PAW)
- ABS/PSS/contributions (but these updates all come as EPNs)
- Adhoc emails are sent if it's 'light news' (but prefer EPN as there's a log of them)
- Scheme calendar (2025 calendar isn't up yet) but has cyclical events captured to enable forward look
- MI lists of members who have received an ABS to enable a reconciliation check, and also MI for PSS recipients (and historically LTA impacted members)
- They used to prepare more branded comms but I would say there has been less of that in the last 18 months
- MyCSP don't provide Welsh translations (not even on request)
- Shared Services – need time to implement any changes (raise a change request)
- We have issues getting comms on the intranet, we use the scheme planner to get 'slots' in for things we know are coming up (ABS, Added pension) but signing with the comms team can be a bit of a rush especially if there are a lot of operational changes happening at the same time. Unless it's urgent, we can get bumped down the list
- Need to write comms with both audiences in mind (employer and member)
- We can use links to the Pension's website but any posters designed by MyCSP, we cannot use due to copyright concerns by our internal comms team
- I'd like to know if the employer compliance matrix will be resurrected
- Receive a monthly list of outstanding DR1s we've not responded to, will that continue?
- Yes the content is good but we used to get a diary/calendar of what will be expected in the future, can we have this? This allows us to build a pension calendar to plot when actions will be required or additional work is to be expected during the year
- Scheme calendar – MyCSP don't update but would be good to see that
- Employer guidance isn't always interpreted correctly (interface) – Then confirmed by ERM team. So there's a risk that information is wrong and we implement things based on misleading information.

Member communications:

- Members find getting information from the scheme and the contact centre really difficult and unclear, so they usual go via internal specialism to translate this information and get what they need
- We re-write them for internal audiences (I know they say don't share but we do copy and paste) because we don't understand the detailed knowledge
- I am rewriting for the member and for something like a newsletter or new podcast, I just need 2 lines for a 'quick update' area of our intranet
- Yes agree- getting McCloud comms to the right people has been a bit of a challenge. (Different cohorts within remedy)
- It would be helpful if there were direct member communications so the employees appreciate that it isn't the employer that administers the scheme. Coming from a small organisation, this is just part of my role so finding time is often difficult.
- Challenge is the time needed to write and circulate to members. Plus it's a fine line between comms and policy (comms want it to be upbeat) – So need to be accurate but plain English
- I think we would all love the straight copy and paste for the internal intranet
- Content pretty good (arrives too late) but we have to write something suitable for intranet or email for members
- If the information can't be shared with members, then it shouldn't be on an open site?
- We are told that the EPN should not be shared with members and that they are for employers only, yet we need to decipher them and then share
- The EPNs are really useful but should be supported with member comms
- They're full of jargon and we need to make them easier to understand for members
- Website search isn't great
- Dates and deadlines – changes to health management contract and change of address details – who is responsible for those changes?
- We don't have intranet so have to rely on sending emails. This is fine but if something is issued and then something else is issued days later, it's annoying as they could have been issued together
- I often feel that the member should be copied into comms between MyCSP and the employer, as this would keep them up to date and allow them to have a view on the accuracy of the content. Also the other way, employer to MyCSP
- Any EPN's that are meant for passing on to members, make the wording member friendly and easy to understand. Ensure any links or instructions work before issuing to employers to distribute. For example the Remedy PSS EPN's were difficult for us to pass information to members and then for them to understand, and many of the process guidance didn't seem to work correctly
- Agreed, improving the searchability and clarity of employee facing comms would definitely help reduce our workload.

ERM and training support:

- Smaller employers need ERM support too as opposed to generic inbox
- Get asked questions but can't respond as they don't know the answer (Hot Topics work well)
- Annual training refers to old EPNs
- ERM service reviews are helpful, but these have been removed for smaller departments
- Hot Topics – are often released too late
- We often receive emails pushing training but always at a cost
- Will the training team continue delivering sessions such as Pension Power, or other sessions for employers, that will be free?
- Hot Topics are great and relevant – bring in experts into the field.

EPNs
- No set frequency
- There is sometimes less of a lead time than we'd like
- The tone is fine – informative. Sometimes some exact messages to share with members would be useful
- I think EPNs are useful and the fact that people can be set up to receive specific ones is useful
- Soft launches have been issued without EPN number (which does not help search for them
- Tone is for a pension lead – it isn't the comms we need to send to members
- Lead time (depending on topic) – Some need immediate action
- Annual EPNs like added pension were better as had links and signposted to more information
- We go back to old EPNs - examples are 576 and 674
- EPNs can refer to old EPNs too
- Actioned EPNs could be archived
- Yes EPN 576 are employers' responsibility that we have to pick up every 18 months
- EPNs – all get message at the same time so no crossed wires
- Does the sign off at CO affect timeline? We are told one is coming but delayed for weeks
- Search functionality for EPNs isn't very good
- It takes 6 weeks to get Ops in diary, so they aren't sent quick enough
- There are some key EPNs that we need to go back to, when something hasn't changed e.g. SoWs, the change of DC provider, the employer administration guidance refers the learner back to some quite ancient EPNs
- Sometimes EPNs are updated but we are not informed of the changes. It would be good to highlight what the changes are on the updated EPN
- EPNs are good when using a Shared Service Provider to request changes under legal obligations
- Keeps all employers informed at the same time and in parallel with legislation
- Helpful for employers to draft HRBP's lines to take to the business
- EPNs numbers are really useful
- I use the wording in the EPN to draft an intranet article. I might change the odd word to suit my organisation but the majority of the content stays the same
- Keep copies of EPNs on file as easier to search (although they are in chronical order online). Can also keep an action of changes
- We refer to EPNs (permanent changes should go into employer guide but don't).

Where do you go for information:
- Employer Pension Guide (EPG) then EPN for most up to date info
- I might search EPNs for a recent update and look to the employer guide as well
- EPG then EPNs
- For information we use the scheme reference guide and general scheme website. We see EPN's as more action prompts for us most of the time
- Depends on the query - if it's a general member's query I will look at the website as a whole so I can link the answer to the member
- I look at both the pensions guide and the EPN. Most of the time you know if that info was issued in an EPN so will search this first. Basically employers pretty much know which of the two sources to use first as you have seen it before...it makes sense
- Sometimes use search icon but it doesn't bring up right EPNs
- Search function – easier to go into Google.

Poll feedback (numbers indicate total responses)

Which comms would you like to continue?
- EPNs (21) and REFs (21) had the highest feedback scores, but all comms currently delivered should continue.

What are the benefits of EPNs?
- When an action is needed
- For information
- To amend current literature/comms
- Legislation/legal changes.

Other:
- Request for change
- Finance/pay colleagues
- Legislation
- Action to employers
- Guidance – to issue comms
- Multiple action
- Summary of information
- Services
- Understanding what has actions
- Clear actions
- Advice
- Comms for members and employers
- To foresee events.

Should EPNs be on the secure portal or public facing website?
- 15 said secure
- 9 said both secure and public
- 0 said public.

What key topics should be covered in the future?
- Scheme calendar
- Reminders
- EPG training
- Pension power
- Pensions
- Savings Statement
- Added pension
- Pension awareness
- Key questions
- Additional Pension
- Response times
- Auto Enrolment
- Contribution rates
- Retrospective corrections
- CS Vote.