
FIND YOUR WAY AROUND THE EMPLOYER PORTAL

Help file to guide employers around the employer portal.

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Welcome to myRailpen

'MyRailpen' is what we call our employer portal. This help file is an overview of the portal features, to help you access and manage your members' pensions.

Depending on your user role you will have access to some or all of the areas on the portal, either in view-only or full edit mode. You also have access to help files, which will guide you through the processes.

If you have questions, you can get in touch using the details in '**Railpen Contacts**' in '**Your Account**'.

THE DASHBOARD

Once logged in, the 'Dashboard' will be displayed.

The 'Dashboard' is your homepage. It includes a news round-up and at a glance scheme reporting.

The screenshot shows the RAILPEN dashboard interface. At the top, there is a navigation bar with the RAILPEN logo on the left and 'Home' and 'Contact' on the right. Below this is a secondary navigation menu with links for Home, Dashboard, Worktray, Manage members, Manage scheme, Tasks, Reports, Resources, News, and Help. The main content area is divided into several sections, each highlighted with a numbered callout:

- 1:** A header section for 'RPMI Ltd' and 'AVC Extra RPMI' with a 'Change scheme to view >>' link.
- 2:** A 'Welcome, PT' section with a user profile icon and a 'YOUR ACCOUNT' dropdown menu. The text below reads: 'Welcome to your dashboard. You can find key statistics about your Section below, along with the latest news updates and upcoming events for your calendar. You can use the 'Your account' menu to the right to manage your account and log out once you've finished your tasks.'
- 3:** A 'Your Tasks' section displaying a summary of tasks: 6 MESSAGES (View all --), 0 TO DO (View all --), 6 FILE LOAD MESSAGES (View all --), and 28 CASES (View all --) with a 'NEXT UPLOAD DATE' of 28 Apr.
- 4:** A 'NEWS ARTICLE' section titled 'Guidance on transfer and retirement options' with a sub-headline 'Members aged 50 or over requesting to transfer or take defined contribution benefits may need to get guidance.' It includes a 'READ MORE >' link and a 'VIEW ALL NEWS ITEMS' link, accompanied by an image of hands using a tablet.
- 5:** A 'Your Statistics' section showing three data points, all with the message 'No data available for % of members registered/nominations completed/members in BRASS/AVCs'.
- 6:** A 'Your Key Events' section with the text 'No events to display'.

The footer contains the RAILPEN logo, links for 'T&Cs', 'Privacy', 'Cookies', 'Accessibility', and 'Safe web use', and a 'CONTACT US >>' button. Below the footer, it states 'myRailpen is powered by Railpen Ltd' and provides copyright information: '© Railpen 2010 - 2022 Registered Office: 100 Liverpool Street, London, EC2M 2AT Registered in England and Wales No. 02315380'.

1 The header

Here you can check the name of the employer and the scheme that you are currently managing on the Employer Portal, clicking on the **'Change scheme to review'** area shows you the name of your scheme and employer. If you have more than one scheme or employer managed by Railpen, you can access them using the link. But only one will display and be available for tasks at any one time.

When you first enter the portal you will be defaulted into the first scheme on our list. You can set which scheme you default into on subsequent visits by going to the **'Change Scheme to View'** page. You can also view the role that you are logged into on this page.

2 Welcome message

This area shows your name and a description of the dashboard contents. To the right, you can access the **'Your account'** link. This is where you can change your password and passphrase. You can also see Railpen contacts. And, although we hope you will never need to, this is where you can make a complaint.

3 Your tasks

This section contains a summary of any items that you are currently working on or that require your attention. It includes your total unread messages, to do items, file load messages, cases and the next upload date..

4 News articles

Here you can find the latest news articles relevant to your employer and scheme.

5 Your statistics

This area provides a summary of the percentage of members registered for the active scheme, nominations completed and members in BRASS/AVCs.

6 Your key events

Here you can find details of any upcoming events relevant to your employer and scheme.

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WORKTRAY

The **'Worktray'** is central to how myRailpen functions. It is where all processes between your organisation, your members and Railpen are managed. As well as notifications in your Worktray, in some circumstances you will also receive an email notification to your chosen email address.

To do list

Anything requiring action in the portal, other than file load messages, appears in the **'To do list'**, which is laid out very much like an email application. To do items contain messages, which often contain a link to perform a task.

Dashboard Worktray Manage members Manage scheme Tasks Reports Resources News Help

Worktray

To do list Messages File load messages Schedules Cases

Search: To do list

PROCESS NAME: All DATE RECEIVED FROM: DD/MM/YYYY DATE RECEIVED TO: DD/MM/YYYY

RESET SEARCH

Search results

PROCESS NAME	WHAT YOU NEED TO DO	DATE RECEIVED	DUE DATE
Process retirement	Member request for retirement CAS-00331852	16/10/2018	08/01/2019

Message details /sent Tuesday, 16 Oct 2018 15:10 CAS-00331852 >>

Member request for retirement

Dear Sir/Madam

Railways Pension Scheme - ABC Section

Member request for retirement – Request for further details

Miss A Smith - Date of birth XX October XXXX

We are getting in touch to advise you that Miss A Smith has contacted ABC to express their intention to retire on 31 December 2018.

We need confirmation from you that this request is acceptable before final benefits can be calculated.

We would be grateful if you could click [here](#) to review this request.

Kind regards

Team Manager
Administration Services

MARK THIS TASK AS COMPLETE

Load contribution employer request	Mismatch of contribution cash and data CAS-00325317	26/09/2018	03/10/2018
Load contribution employer request	Mismatch of contribution cash and data CAS-00325311	26/09/2018	03/10/2018

Showing 1 - 3 of 3 Records per page: 10

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CONTACT US

Items will have a red, amber or green status flag, indicating how urgent the task is. Once a user

verifies the action as complete it will disappear from the **'To do list'**.

Messages

This is similar to the **'To do list'**, but messages don't contain links to actions. They are for information only. For example, a confirmation that a process has been completed, or a notification of a case closure.

- To do list
- Messages**
- File load messages
- Schedules
- Cases

Search: Messages

PROCESS NAME: DATE RECEIVED FROM: DATE RECEIVED TO:

Search results

PROCESS NAME	MESSAGE	DATE RECEIVED	SELECT
Others	Next cycle of work list	22/11/2018_20:12	<input type="checkbox"/>
Others	Next cycle of work list	22/11/2018_20:12	<input type="checkbox"/>
Record change to expected contributions	Railways Pension Scheme - RPMI Section - Confirmation of changes CAS-00470631	30/10/2018_23:08	<input type="checkbox"/>
Process retirement	Reminder for information / doc to party CAS-00331852	23/10/2018_21:32	<input type="checkbox"/>
Provide Estimate	Estimate of benefits CAS-00389922	23/10/2018_12:32	<input type="checkbox"/>

738286#RPC05_3.pdf

Estimate of benefits

Dear Sir / Madam,

Railways Pension Scheme - RPMI Section

Miss A Smith

Estimate of benefits

We are writing to inform you that the pension benefits estimate requested for Miss A Smith is now available.

Please click [here](#) to view the pension benefits estimate.

Kind regards

Team Manager
Administration Services

Provide Estimate	Estimate of benefits CAS-00389564	17/10/2018_13:33	<input type="checkbox"/>
Load contribution employer request	Reminder for information / doc to party CAS-00325317	02/10/2018_11:13	<input type="checkbox"/>
Load contribution employer request	Reminder for information / doc to party CAS-00325311	02/10/2018_11:13	<input type="checkbox"/>
Load contribution employer request	Reminder for information / doc to party CAS-00325311	28/09/2018_20:30	<input type="checkbox"/>
Load contribution employer request	Reminder for information / doc to party CAS-00325317	28/09/2018_20:30	<input type="checkbox"/>

Showing 1 - 10 of 12

Records per page: 10

DELETE SELECTED MESSAGES

File load messages

This is similar to the 'To do list', but contains any validation errors relating to interface files that you have uploaded. You will need to take action on these messages, either by loading a revised interface file, or using the interactive forms on the portal. You need to ensure that any errors are quickly resolved, so that the data is correct when we produce the contribution schedule.

The screenshot displays the RAILPEN Worktray interface. At the top, there are navigation links for 'Home', 'Dashboard', 'Worktray', 'Manage members', 'Manage scheme', 'Tasks', 'Reports', 'Resources', 'News', and 'Help'. The 'Worktray' section is active, showing a 'To do list', 'Messages', 'File load messages' (highlighted in red), 'Schedules', and 'Cases'.

The 'File load messages' section includes a search bar and a table of results. The search criteria are 'DATE RECEIVED FROM' and 'DATE RECEIVED TO'. The search results table is as follows:

MESSAGE	FILENAME	PACK KEY	CORRECTION NUMBER	DATE RECEIVED	SELECT
Data file validation errors: CAS-06272982	DB2401HYLLUNT02_2035_20230331.xml	TY2324PN01PF-GIDHYLLUN_2	0	31/03/2023 - 19:05	[icon]
Data file validation errors: CAS-06250944	DB2401HYLLUNT_0_2035_20230324.xml	TY2324PN01PF-GIDHYLLUN	0	24/03/2023 - 15:24	[icon]
Data file validation errors: CAS-06235919	07906820_Case4Dat uExcel_SWR_20233 214122239430.xls		1	21/03/2023 - 13:20	[icon]
Data file validation errors: CAS-06235919	DB2319HYLLUNC_0_2035_20230315.xml		0	16/03/2023 - 10:05	[icon]
File loaded successfully: CAS-06227389	DB2319HYLLUNT04_2035_20230315.xml	TY2223PN13PF-GIDHYLLUN_4	0	17/03/2023 - 18:04	[icon]
Data file validation errors: CAS-06212136	DB2319HYLLUNT03_2035_20230310.xml	TY2223PN13PF-GIDHYLLUN_3	0	12/03/2023 - 08:44	[icon]
File loaded successfully: CAS-06200958	DB2319HYLLUNT02_2035_20230305.xml	TY2223PN13PF-GIDHYLLUN_2	0	05/03/2023 - 08:38	[icon]

At the bottom of the table, it shows 'Showing 1 - 8 of 8' records and 'Records per page: 10'. There is also a 'DELETE ALL DELETED MESSAGES' button.

The footer of the page includes the RAILPEN logo, links for 'TSCs', 'Privacy', 'Cookies', 'Accessibility', and 'Safe web use', and a 'CONTACT US' button. Below the footer, it states 'railpen is powered by Railpen Ltd' and provides copyright information: '© Railpen 2012 - 2023 Registered Office: 100 Liverpool Street, London, EC2M 2AT Registered in England and Wales No. 02313969'.

Schedules

This is a diary-view of planned events or activities for the scheme. You can view it one month at a time. This is where you will see your contribution schedules.

Dashboard Worktray Manage members Manage scheme Tasks Reports Resources News Help

Worktray

To do list Messages File load messages Schedules Cases

Pay Schedules

Contribution loads are only permitted 7 days before the pay date.

NOTE: Any member changes required, need to be made before a contribution load.

September 2018

PAY DATE	SCHEDULES	PAYROLL ID	FREQUENCY	PAY PERIOD	STATUS
Tuesday 25	Load Contribution Schedule - RPS072018091974568	101	MON		LOAD CONTRIBUTIONS

RAILPEN

1 have 5 things to do 1 have 2 messages My next data load is 14/04/2023 525,000

YOUR ACCOUNT LOG OUT

Login status: MYRAILPENADMIN Last login: 04/04/2023

RPMI Ltd
Railways Pension Scheme - Railpen Section
Change scheme to view

Home Dashboard Worktray Manage members Manage scheme Tasks Reports Resources News Help

Worktray

To do list Messages File load messages Schedules Schedule payment history Cases

Schedule payment history

Please select the Payroll ID and pay frequency for which you would like to view the history of the schedules.

* PAYROLL ID: 887011314

* PAY FREQUENCY: Four weekly

[PROCEED](#)

RAILPEN

- [T&Cs](#)
- [Privacy](#)
- [Cookies](#)
- [Accessibility](#)
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You will be notified of events that require your action by a message in the **'To do list'**. Providing contribution data on time is important to the management of your scheme. The schedules area will keep you informed of any actions that are needed.

Cases

Cases are the result of an action, either by the member, the employer or Railpen.

The **'Cases'** area of the **'Worktray'** is where you can search to locate a specific case.

The screenshot shows the 'Cases' section of the Worktray interface. At the top, there is a navigation bar with tabs for Dashboard, Worktray, Manage members, Manage scheme, Tasks, Reports, Resources, News, and Help. Below this is a sub-navigation bar with icons for To do list, Messages, File load messages, Schedules, and Cases (which is highlighted in orange).

The main content area is titled 'Cases' and includes a brief explanation: 'Cases are automatically archived 12 month(s) from their creation date, unless you tell us otherwise. You can change how frequently cases are archived from between 1 and 12 months.' Below this is a link to 'Change case archiving preferences'.

The 'Case search' section contains a search form with the following fields:

- CASE ID: [Text input]
- CASE STATUS: [Dropdown menu: Select Case Status]
- CASE TYPE: [Dropdown menu: Select Case Type Method]
- NI NUMBER: [Text input]
- SEARCH DATE RANGE FROM: [Date input: DD/MM/YYYY with calendar icon]
- DATE RANGE TO: [Date input: DD/MM/YYYY with calendar icon]

 At the bottom of the search form are 'RESET' and 'SEARCH' buttons.

Below the search form is a 'Search results' section containing a table with the following data:

CASE ID	TYPE	MEMBER NAME	NINO	DATE CREATED	STATUS	VIEW
CAS-00282198	File case	NA	NA	06/09/2018 09:31:56	In progress	
CAS-00279712	File case	NA	NA	05/09/2018 14:17:48	In progress	
CAS-00280716	Process new entrants	MR Benn Four	AB555555A	30/08/2018 11:25:46	Closed	
CAS-00280713	File case	NA	NA	30/08/2018 11:24:29	In progress	
CAS-00280704	File case	NA	NA	30/08/2018 10:12:15	In progress	
CAS-00280698	File case	NA	NA	30/08/2018 09:50:40	In progress	
CAS-00278287	File case	NA	NA	24/08/2018 15:19:52	In progress	
CAS-00278240	File case	NA	NA	24/08/2018 10:26:06	In progress	
CAS-00278233	File case	NA	NA	24/08/2018 08:10:48	In progress	
CAS-00278174	File case	NA	NA	23/08/2018 15:49:53	In progress	

At the bottom of the table, there is a pagination control showing 'Showing 1 - 10 of 10' and a 'Records per page' dropdown set to '10'.

Cases may contain several activities, which can be seen in the **'Case history'**. Case statuses are as follows:

- Draft – The case has been saved in the Employer Portal but has not yet been sent to Railpen
- In Progress – Railpen has received the case and has started processing it
- Pending Info – The case requires further information or documentation to enable it to progress further
- Cancelled – The case has been cancelled
- Closed – The case has been processed and closed.

There may be lots of additional steps behind the scenes carried out by Railpen systems and our administrators but they have been simplified so you only see what you need to.

The screenshot shows the Worktray interface with a navigation bar at the top containing 'Dashboard', 'Worktray', 'Manage members', 'Manage scheme', 'Tasks', 'Reports', 'Resources', 'News', and 'Help'. Below the navigation bar is a 'Worktray' header with a folder icon. A secondary navigation bar contains 'To do list', 'Messages', 'File load messages', 'Schedules', and 'Cases' (highlighted in orange). The main content area is titled 'Case search' and includes a link 'Back to case search results'. The 'Current selected case' section displays the following details:

Case ID:	CAS-00298285	Case status:	Draft
Member name:	MR John W Smith	Case type:	Provide pension input amount statement
NI Number:	XX 00 00 00 X	Created on:	11/09/2018_12:29
		Origin:	Portal

Below the details are two buttons: 'DELETE' (with a red X icon) and 'RESUME' (with a green double arrow icon). The 'Case history' section contains a table with the following data:

DATE	STATUS	OWNER
11/09/2018_12:29	In progress	SYSTEM

If you want to see all cases for a particular member you can do this in the 'Manage members' section.

MANAGE MEMBERS

'Manage members' is where you can search for an active member and view their record.

The screenshot displays the RAILPEN 'Manage members' interface. At the top, there is a navigation bar with links for Home, Dashboard, Worktray, Manage members, Manage scheme, Tasks, Reports, Resources, News, and Help. Below this is a 'Member search' section with a search form. The form includes fields for First Name, Surname, NI Number, Date of Birth, and Pension Reference Number. A 'SEARCH' button is present. Below the search form, there is a 'Search results' section showing a table of active members. The table has columns for Title, Initial, First Name, Surname, DOB, Member Status, and View. The footer contains the RAILPEN logo, links for Terms, Privacy, Cookies, Accessibility, and Site web site, and a CONTACT US button.

TITLE	INITIAL	FIRST NAME	SURNAME	DOB	MEMBER STATUS	VIEW
Miss	A	Khuu	HEYNEXJ	04/11/1967	ACTIVE	⊙
Miss	A	Hydley	Jaytic	04/05/1989	ACTIVE	⊙
Miss	A	Limang	Ornt	15/04/1994	ACTIVE	⊙
Miss	A	Steece	Ljhrqel	28/02/1994	ACTIVE	⊙
Miss	B	Zanbu	JGJUV	33/08/1980	ACTIVE	⊙
Miss	B	Qui	Andyaga	17/11/1966	PRESERVED	⊙
Miss	B	Progrm	Dngas	24/07/1993	ACTIVE	⊙
Miss	B	Deve	Pepel	18/08/2001	ACTIVE	⊙
Miss	C	Dnga	YSHRC	28/07/1995	ACTIVE	⊙
Miss	C	Alact	Xosab	08/08/1964	ACTIVE	⊙

The member record includes information on:

- Personal details
- Membership
- Expected contributions
- Actual contributions history
- Pay history
- Contributions and benefit underpin pay history
- Estimates
- Cases

MANAGE SCHEME

The **'Manage scheme'** area contains information about the scheme. For example, it has lots of really useful links to scheme documents, including, financial statements, scheme returns and the guide to services.

If you have more than one scheme managed on the portal, you will see a link underneath your scheme name, which takes you to a page where you can change the scheme you are currently viewing. You will need to do this to carry out tasks and activities for that scheme.

The screenshot shows the RAILPEN portal interface. At the top, there are navigation links for 'HOME', 'DASHBOARD', 'WORKTRAY', 'MANAGE MEMBERS', 'MANAGE SCHEME', 'TASKS', 'REPORTS', 'RESOURCES', 'NEWS', and 'HELP'. The 'MANAGE SCHEME' section is active, displaying the scheme name 'RPM Ltd Railways Pension Scheme - RPM Section' and a 'CHANGE SCHEME TO VIEW' link. Below this, there is a large graphic with icons representing funding, service overview, investments, and scheme governance. The page also features a footer with the RAILPEN logo, links for 'T&Cs', 'Privacy', 'Cookies', 'Accessibility', and 'Safe web site', and a 'CONTACT US' button. The footer text includes: '© Railpen 2019 - 2022 Registered Office: 100 Liverpool Street, London, EC2M 2AT Registered in England and Wales No.02315066'.

TASKS

The **'Tasks'** area is where you'll find the processes that you're able to do online. Nearly all processes can be accessed either through:

- The task menu; or
- The member record

NOTE: Some processes are triggered by an event or a message in your **'To do list'**, so they don't appear in the menus. For example, confirming your yearly pay date schedule.

Most processes are self-explanatory and guide you through step-by-step. However, there are PDF help files and video walkthroughs, for the more complex processes. These not only explain the process, but tell you what you'll need before you start. For example, making sure member salaries are up-to-date.

The screenshot shows the 'Tasks' section of a web application. The navigation menu at the top includes: Dashboard, Worktray, Manage members, Manage scheme, Tasks, Reports, Resources, News, and Help. The main heading is 'Tasks' with a gear icon. Below this is a section titled 'Change member details' with a sub-heading 'Change member details' and a description: 'You can make changes to members' details using the tasks in this process. In order to make some of those changes you will be asked to confirm that you have seen the necessary proof.' To the right, a 'Processes in this tasklist:' section lists several tasks with links: Change member name, Change member NI number, Change member DOB, Change member marital status, Change member gender, Change member address, Change member salary details, IWDC to shared cost override, and Record change of contributions. The main content area is titled 'Change name' and shows a 3-step process: 1. Member details, 2. Name details, and 3. Review and confirm. Step 2 is currently active. It includes instructions: 'Use this 3-step process to change a member's name. You will be asked to confirm that you have seen proof of the name change.' and 'Please note that * indicates required field.' There is a link to a 'Helpfile related to this transaction' and a 'Transaction progress' bar. The form for 'Step 2 of 3: Name details' asks for 'Please enter the member's new details below.' It has two columns: 'Existing data:' and 'Change to:'. The 'Existing data:' column contains: TITLE: Mr, INITIALS: JA, FIRST NAME: John, MIDDLE NAME: (empty), SURNAME: Smith. The 'Change to:' column has a dropdown menu for TITLE (currently showing 'Select'), and empty input fields for INITIALS, FIRST NAME, MIDDLE NAME, and SURNAME. Below the form is a 'Confirmation' section with a checkbox and the text '* I confirm I have seen proof of the member's name change.' At the bottom, there are buttons for 'SAVE DRAFT', 'BACK', 'NEXT', and 'CANCEL'.

Links to the help files and videos can be found at the start of the process, and can also be found in the **'Help'** area.

File upload

You can also upload any interface files using the **'File upload'** function included in the **'Tasks'** menu.

Tasks

File upload

You can upload and submit files to RPMI using this process. Please ensure you check all information provided carefully.

Please note that * indicates required field.

[Helpfile related to this transaction](#)

Please select file and upload.

* SELECT FILE:

Supports only xml, zip and txt file formats.

REPORTS, RESOURCES, NEWS AND HELP

Reports

The **'Reports'** area is where you'll find administration, investment and member report information and a repository of historic quarterly reports. Elements of several different reports will be fed into a future dashboard summary and refreshed at different intervals:

- Member data – weekly and quarterly
- Member age profile – weekly
- Member activity – weekly and quarterly
- Service levels – quarterly
- Net asset statement report – quarterly

Resources

The **'Resources'** area is mainly a repository for documents. It has a store of member-facing scheme communications, giving you easy access to the scheme literature your members receive.

News

The **'News'** area keeps you up-to-date with what's happening both in the scheme and across the pension industry. Articles range from scheme and regulatory news to technical bulletins and commentary.

Help

'Help' includes a comprehensive set of Help files to answer most queries. If you can't find what you are looking for, there is a link to an enquiry form. Help files for processes are also available at the start of tasks. They will help you to check if there is anything you need to do before you begin, and explain more about the task.

EMPLOYER USER ROLES

There are four roles available, as shown below. Once you have notified Railpen of who needs access to which roles we will set them up for you.

Administrator

This role has access to all functionality.

HR

This role has access to those processes associated with benefit processing. This is likely to be someone in your HR team.

Payroll

This role has access to those processes associated with making changes to member records and contributions. This is likely to be someone in your payroll or finance teams.

Viewer

This role has read-only access to some screens and cannot make any updates to member records.

Senior Finance User

This role has access to the full schedule payment history and messages

Junior Finance User

This role has access to schedule payment history total and messages.

Railpen will also regularly verify users with you (there is no limitation to the amount of users that each employer can have). Access for each of the roles is either:

- Full – edit and view information
- View – view information
- None – no access

Details of what each role can access are shown below.

Worktray

Where all processes between your organisation, your members and Railpen are managed. Only actions and messages applicable to the role will appear in the **'Worktray'**.

What?	Purpose?	Admin	HR	Payroll	Viewer	Senior Finance User	Junior Finance User
To do list	Where anything requires action	Full	Full	Full	None	None	None

Messages	For information	Full	Full	Full	None	Full	Full
File Load messages	Contains any validation errors relating to interface files that you have uploaded	Full	Full	Full	None	None	None
Schedules	Diary view of planned events or activities for the scheme	Full	None	Full	None	Full	Overall totals but not member-level breakdown
Cases	The result of an action, either by the member, the employer or Railpen	Full	Full	Full	None	None	None

Manage members

Where you can search for an active member and view their record.

What?	Purpose?	Admin	HR	Payroll	Viewer	Senior Finance User	Junior Finance User
Personal Details	View membership data	View	View	View	View	None	None
Membership	View membership data	View	View	None	View	None	None
Expected Contributions	View membership data	View	None	View	View	None	None
Actual Contributions History	View membership data	View	None	View	View	None	None
Pay History	View membership data	View	View	View	View	None	None
Contribution & benefits underpin pay history	View membership data	View	View	View	View	None	None
Estimates	View estimates requested by the employer	View	View	None	View	None	None
Cases	View cases relating to the member	View	View	View	View	None	None

Tasks

Where you'll find the processes you're able to do online.

What?	Purpose?	Admin	HR	Payroll	Viewer	Senior Finance User	Junior Finance User
New Entrant	To process a new entrant	Full	None	Full	None	None	None
Change member details	To make a change to member personal details	Full	None	Full	None	None	None
Request estimate	To request an estimate on behalf of the member	Full	Full	None	None	None	None
Provide PIA statement	To request a Pensions Input Amount statement	Full	Full	None	None	None	None
Leaver	To process a leaver	Full	Full	None	None	None	None
Retirement	To process a retirement	Full	Full	None	None	None	None
Death	To process a death	Full	Full	None	None	None	None
Ill Health	To process an ill health retirement	Full	Full	None	None	None	None
Benefit Waiver option	To process a Benefit Waiver	Full	Full	None	None	None	None
Adjust benefit entitlement	To recalculate benefits	Full	Full	None	None	None	None
Request for information	To enquire on case progress on behalf of a member	Full	Full	Full	Full	None	None
Request Loss of Investment	To request Loss of Investment for an AVC member	Full	Full	None	None	None	None
Manage Pay	To add a new pay	Full	None	None	None	None	None

Frequency	frequency for a scheme						
Record change to contributions	To change the expected contributions of a member (includes changing pay frequency & payroll ID, AVCs, working hours, maternity and employment hiatus)	Full	None	Full	None	None	None
Upload interface file	To upload an interface file for processing	Full	Full	Full	None	None	None

Reports

Where you'll find administration, investment and member report information, along with a repository of historic quarterly reports to view and download.

What?	Purpose?	Admin	HR	Payroll	Viewer	Senior Finance User	Junior Finance User
Reports	Scheme & member information	Full	Full	None	None	None	None