FIND YOUR WAY AROUND THE EMPLOYER PORTAL

Help file to guide employers around the employer portal.

CONTENTS

Welcome to my**Railpen**

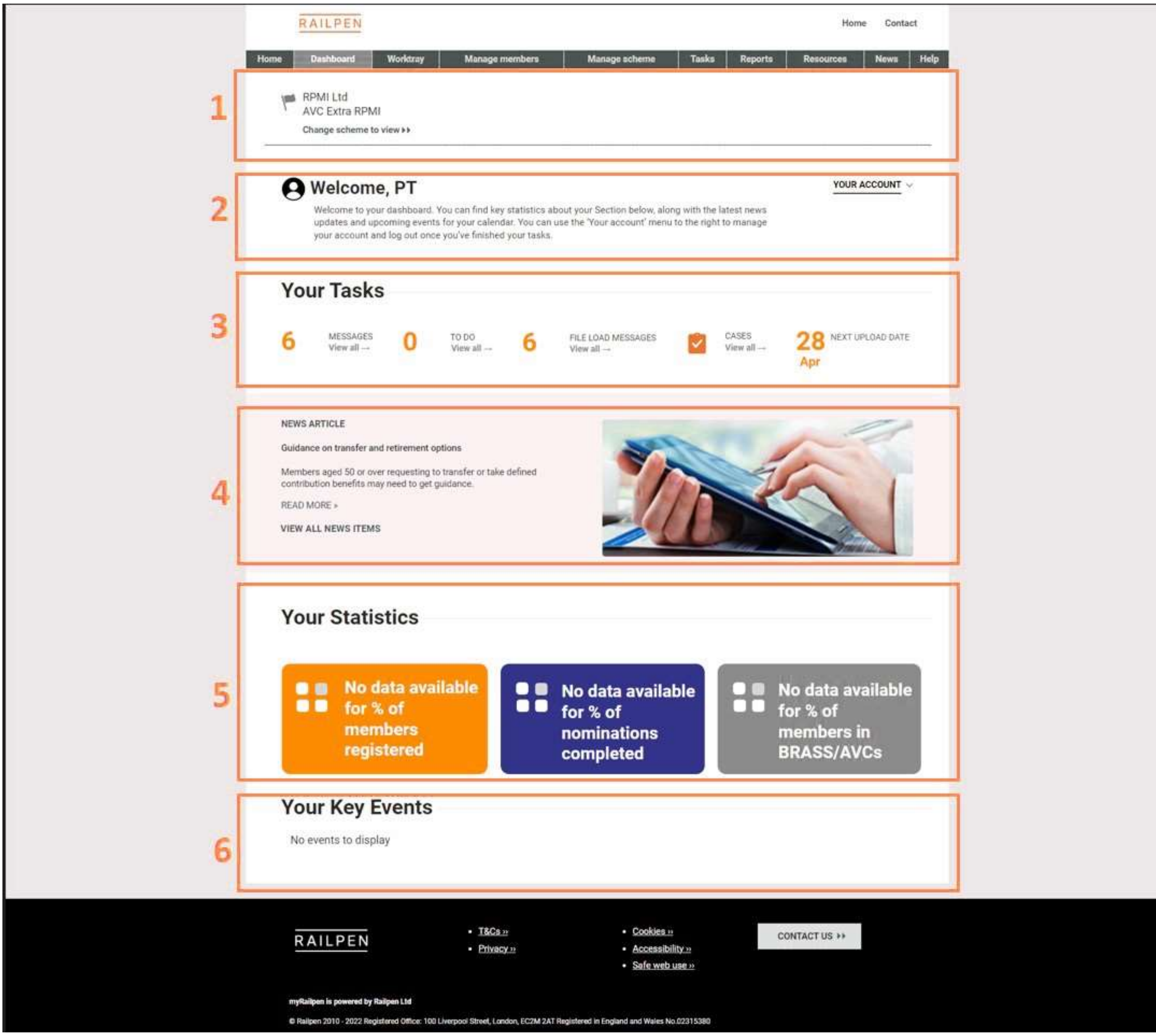
‘**MyRailpen** is what we call our employer portal. This help file is an overview of the portal features, to help you access and manage your members’ pensions.

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’**.

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.



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

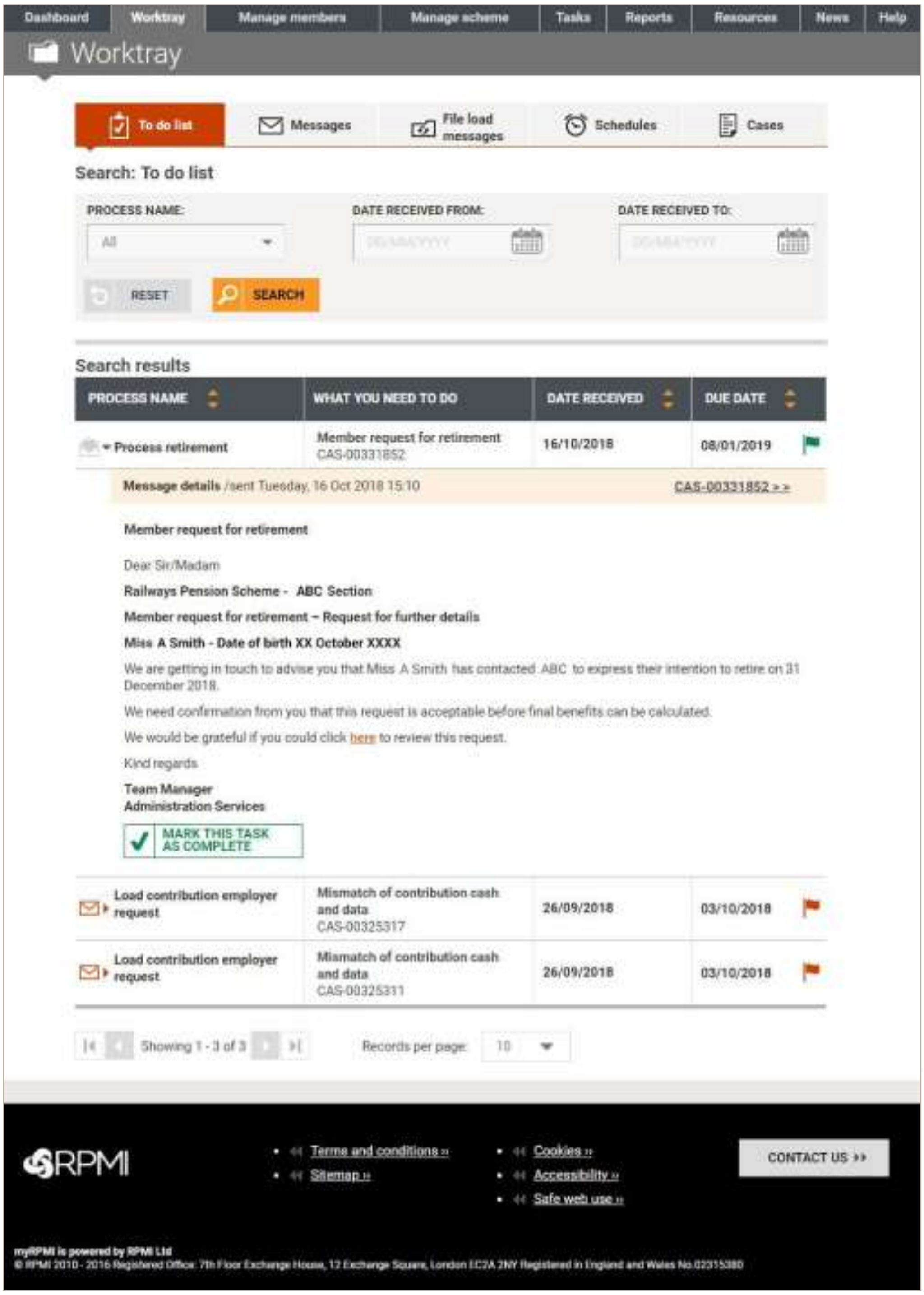
Your key events

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

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

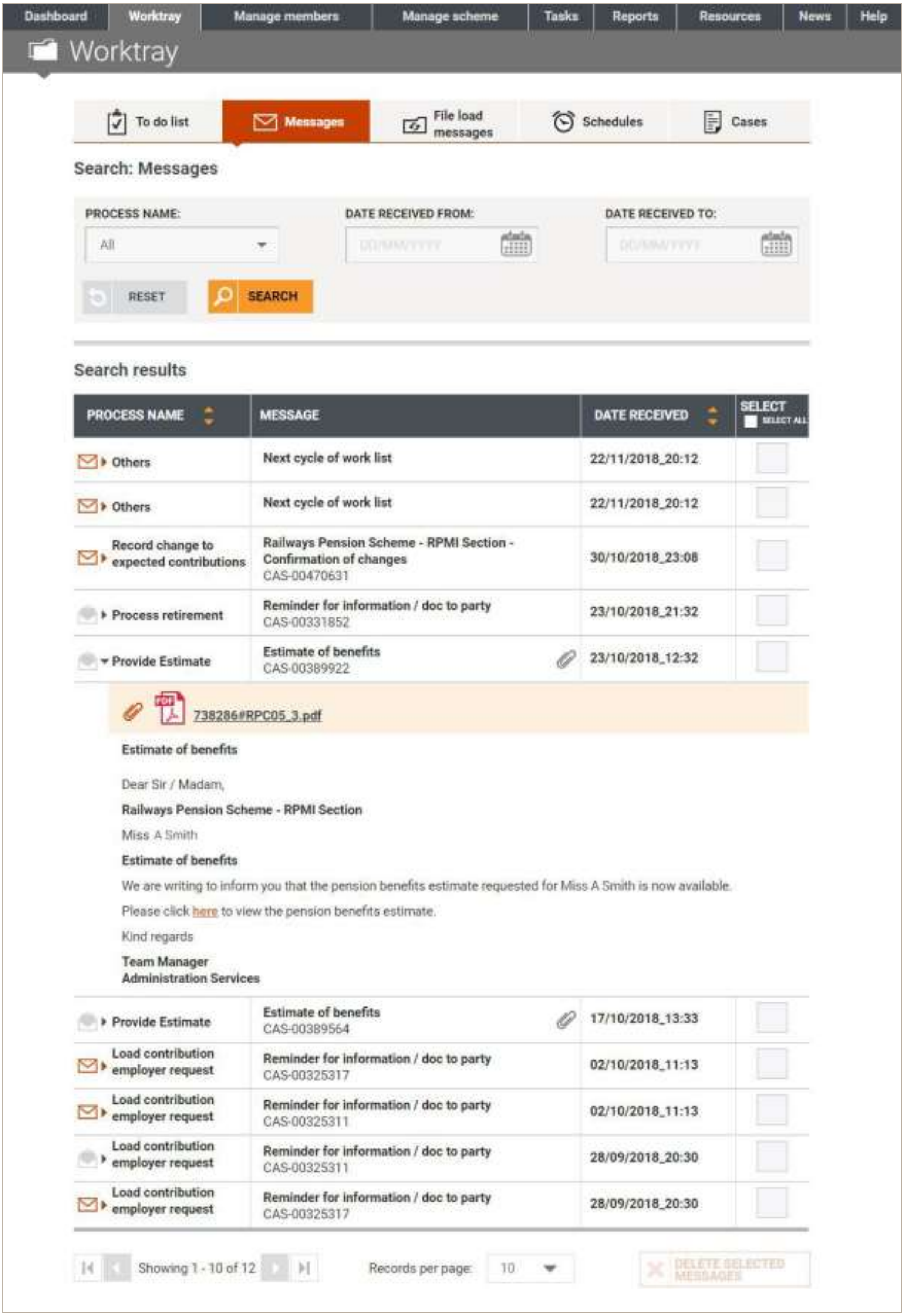
Anything requiring action in the portal, other than file load messages, appears in the **'To do list'**, which is laid out very much like an email application. To do items contain messages, which often contain a link to perform a task.



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.


Dashboard
Worktray
Manage members
Manage scheme
Tasks
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To do list
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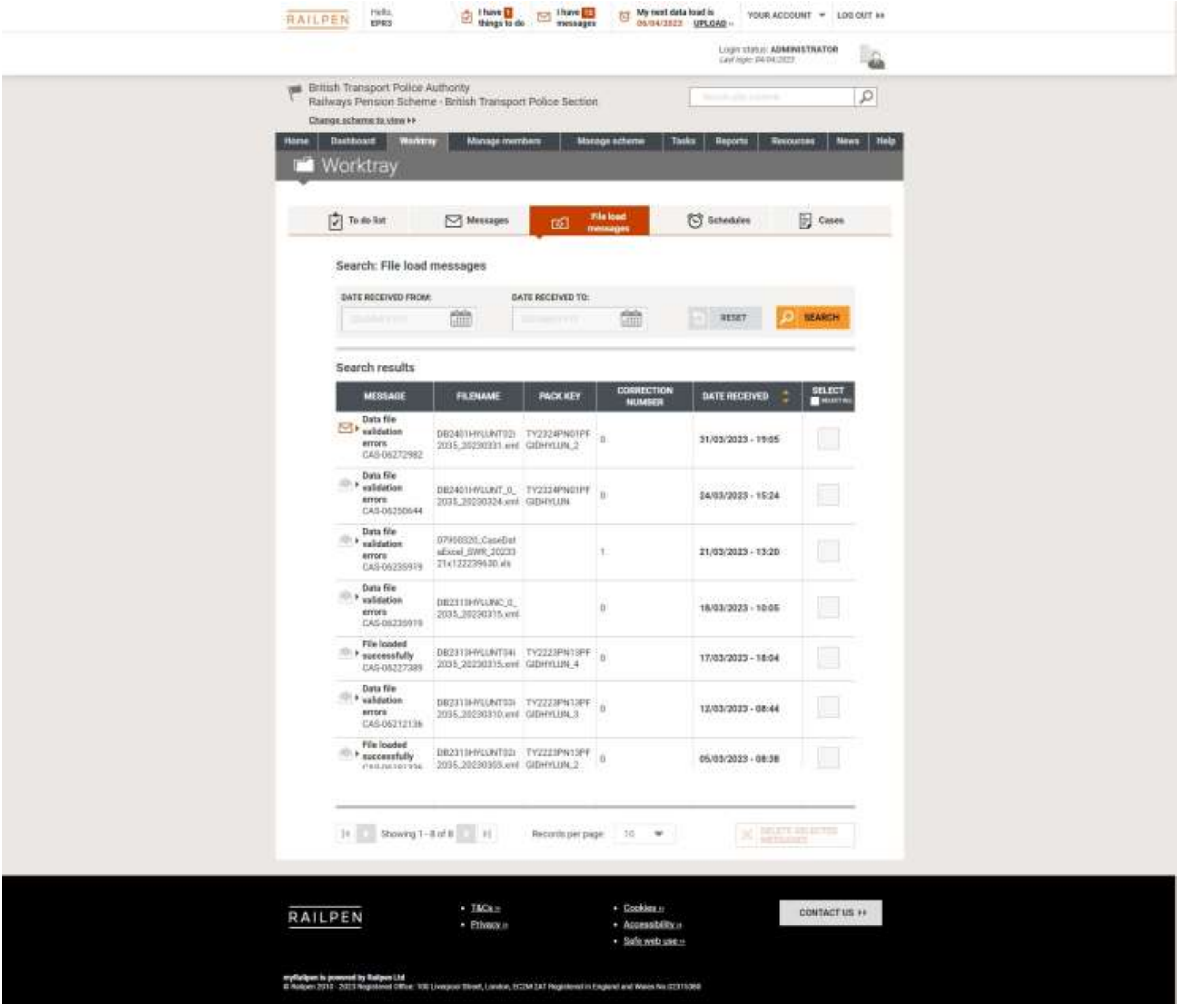
Schedules
Cases
Search: Messages
PROCESS NAME:
All
DATE RECEIVED FROM:
DATE RECEIVED TO:
RESET
SEARCH
Search results
PROCESS NAME
MESSAGE
DATE RECEIVED
SELECT
SELECT ALL
Others
Next cycle of work list
22/11/2018_20:12
Others
Next cycle of work list
22/11/2018_20:12
Record change to expected contributions
Railways Pension Scheme - RPMI Section - Confirmation of changes
CAS-00470631
30/10/2018_23:08
Process retirement
Reminder for information / doc to party
CAS-00331852
23/10/2018_21:32
Provide Estimate
Estimate of benefits
CAS-00389922
23/10/2018_12:32
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
Load contribution employer request
Reminder for information / doc to party
CAS-00325317
02/10/2018_11:13
Load contribution employer request
Reminder for information / doc to party
CAS-00325311
02/10/2018_11:13
Load contribution employer request
Reminder for information / doc to party
CAS-00325311
28/09/2018_20:30
Load contribution employer request
Reminder for information / doc to party
CAS-00325317
28/09/2018_20:30
Showing 1 - 10 of 12
Records per page:
10

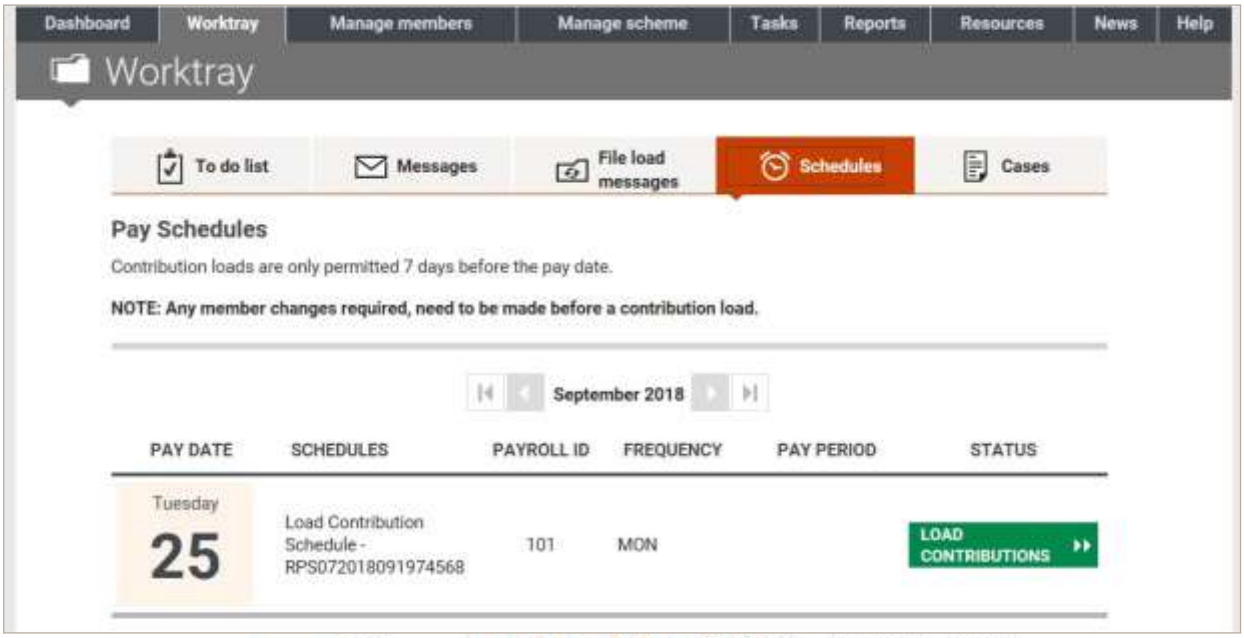
File load messages

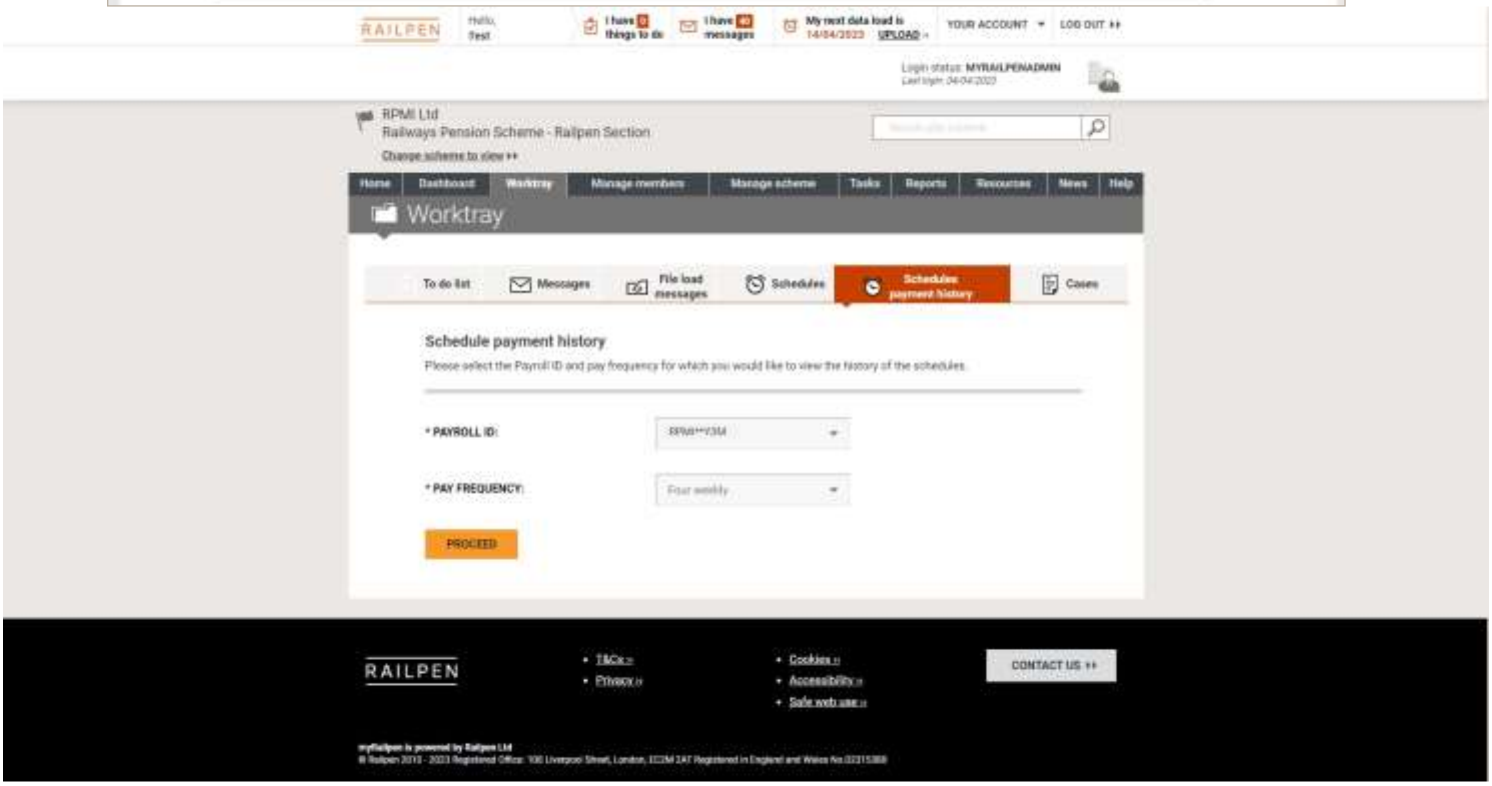
This is similar to the **'To do list'**, but contains any validation errors relating to interface files that you have uploaded. You will need to take action on these messages, either by loading a revised interface file, or using the interactive forms on the portal. You need to ensure that any errors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



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.



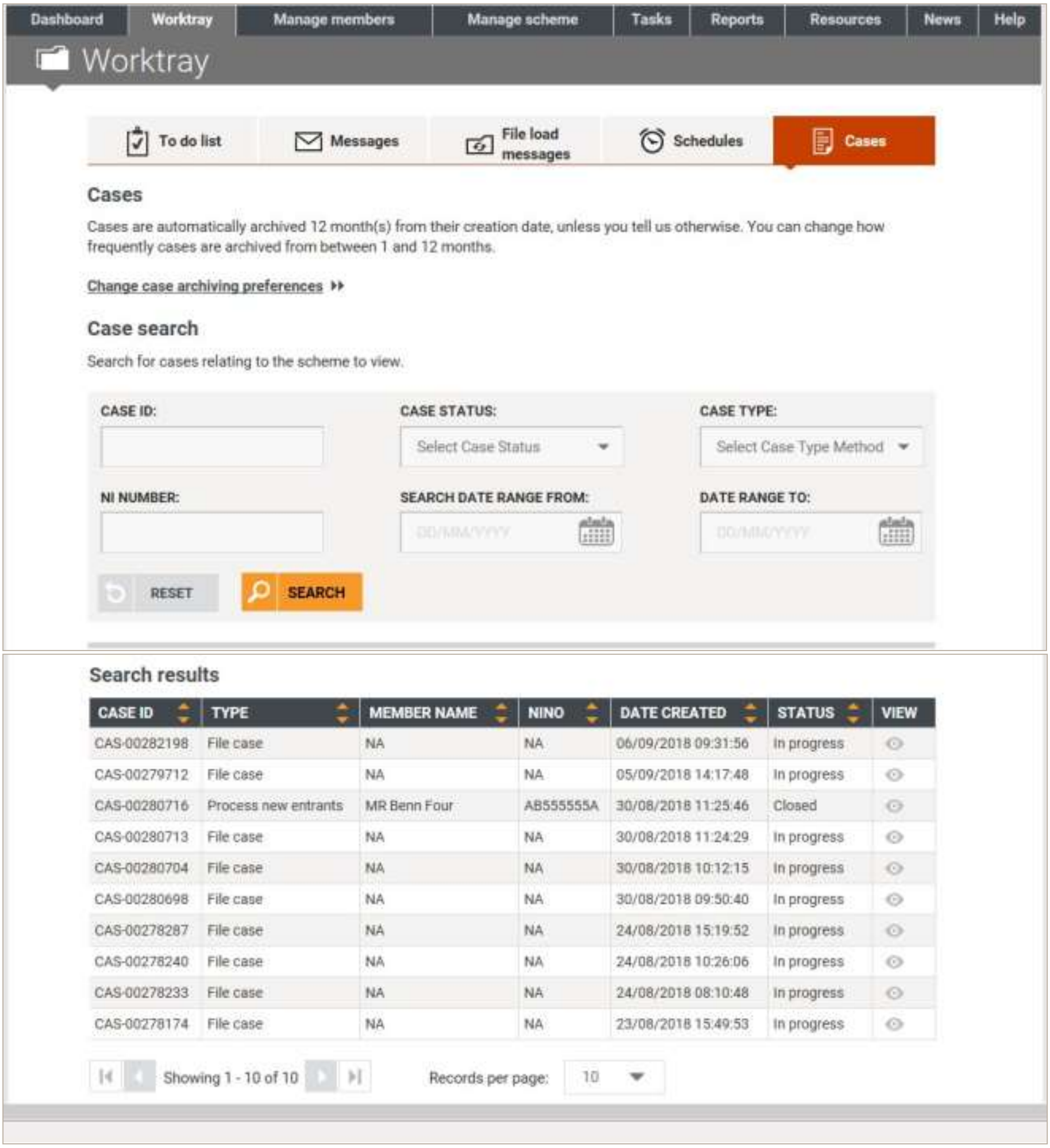


You will be notified of events that require your action by a message in the **'To do list'**. Providing contribution data on time is important to the management of your scheme. The schedules area will keep you informed of any actions that are needed.

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.

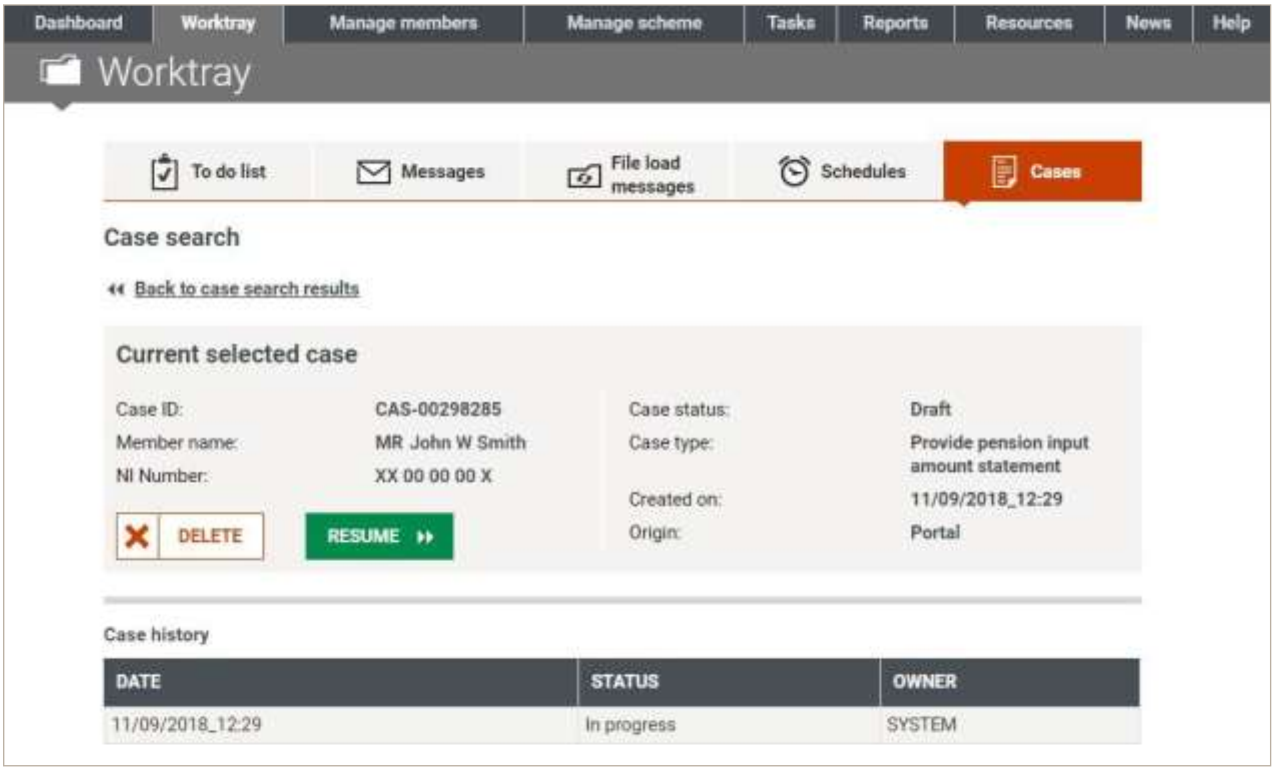


CASE ID	TYPE	MEMBER NAME	NINO	DATE CREATED	STATUS	VIEW
CAS-00282198	File case	NA	NA	06/09/2018 09:31:56	In progress	
CAS-00279712	File case	NA	NA	05/09/2018 14:17:48	In progress	
CAS-00280716	Process new entrants	MR Benn Four	AB555555A	30/08/2018 11:25:46	Closed	
CAS-00280713	File case	NA	NA	30/08/2018 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	

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

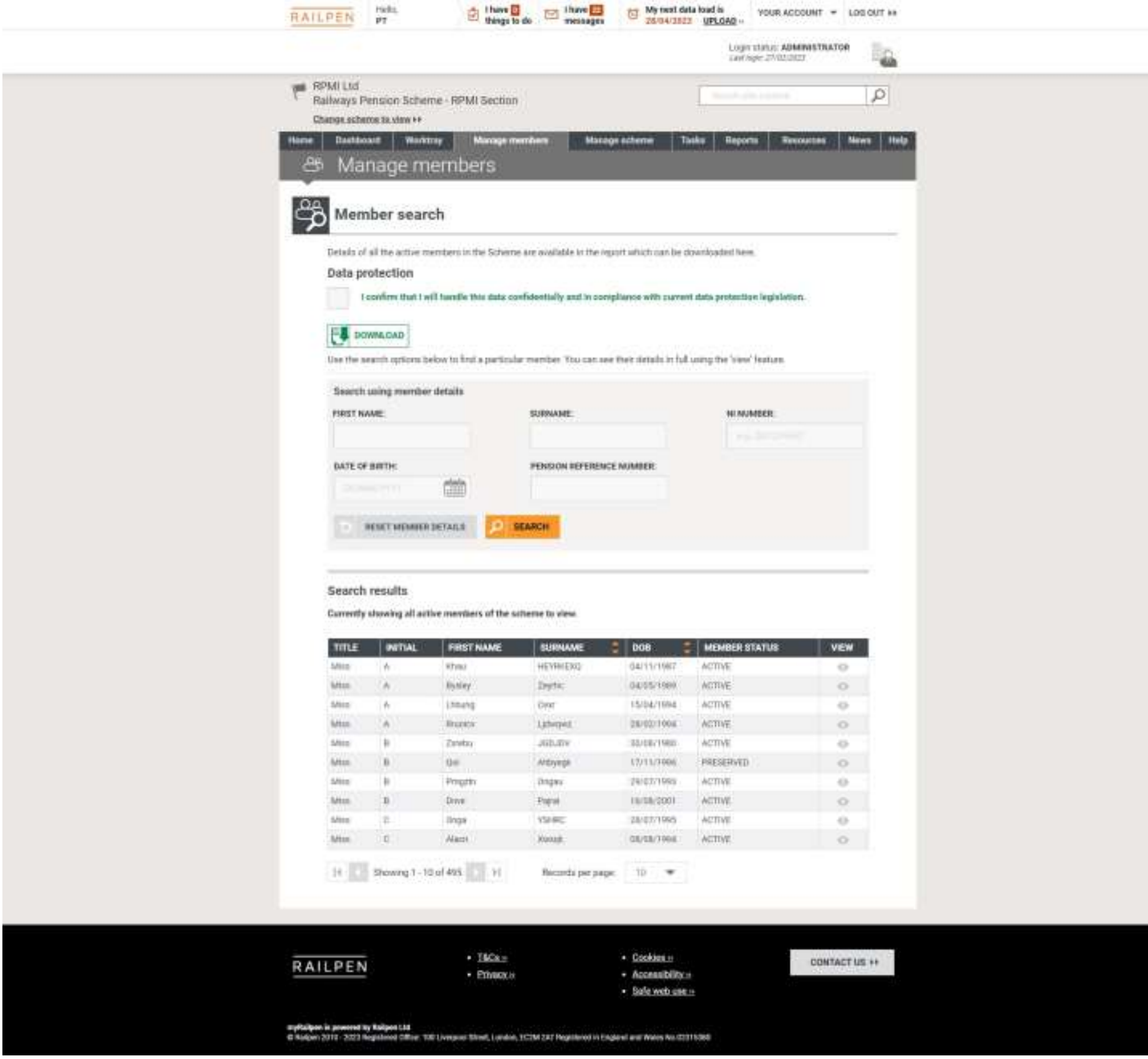
- Draft – The case has been saved in the Employer Portal but has not yet been sent to Railpen
- In Progress – Railpen has received the case and has started processing it
- Pending Info – The case requires further information or documentation to enable it to progress further
- Cancelled – The case has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



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

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



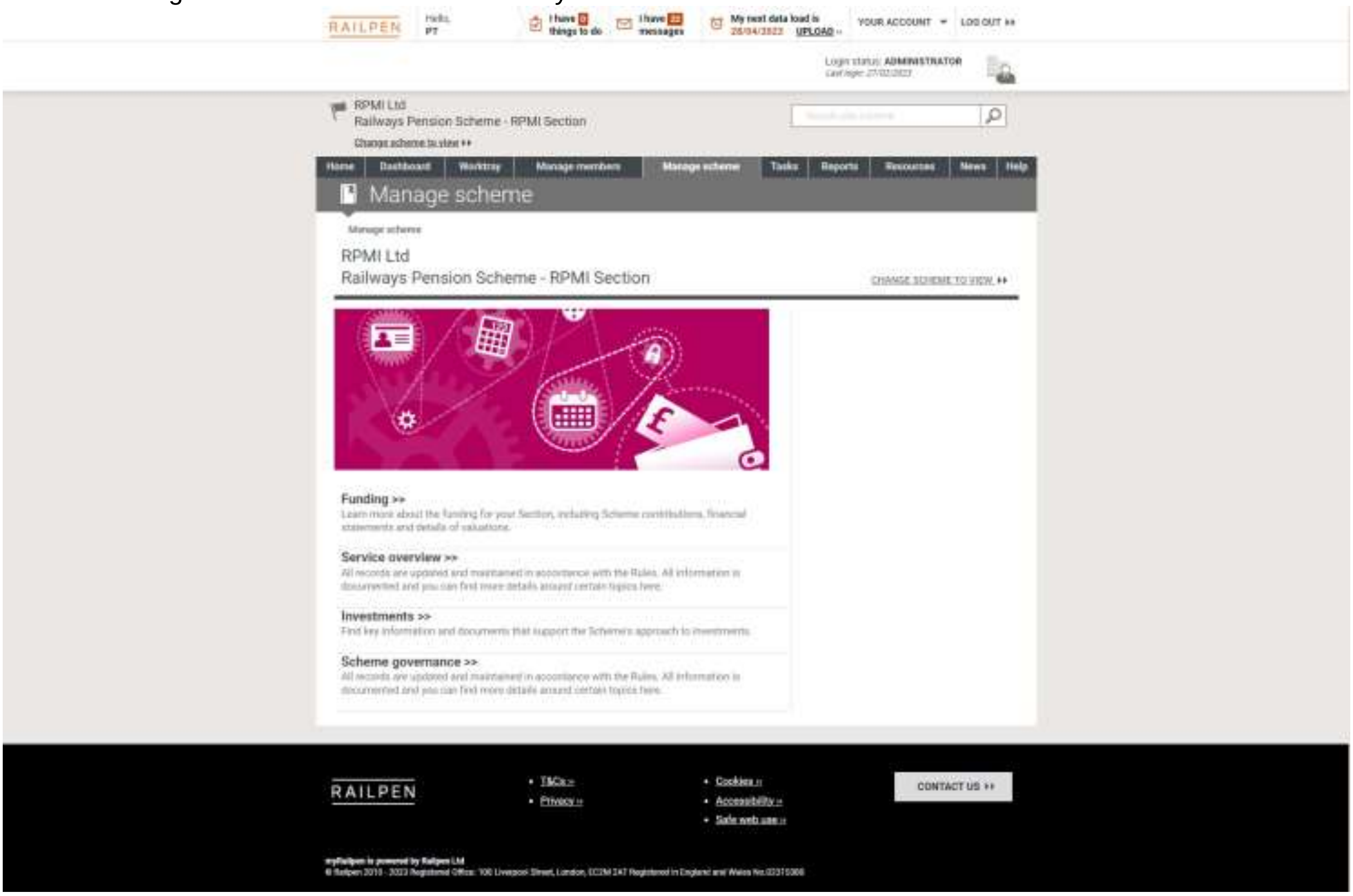
The member record includes information on:

- 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.



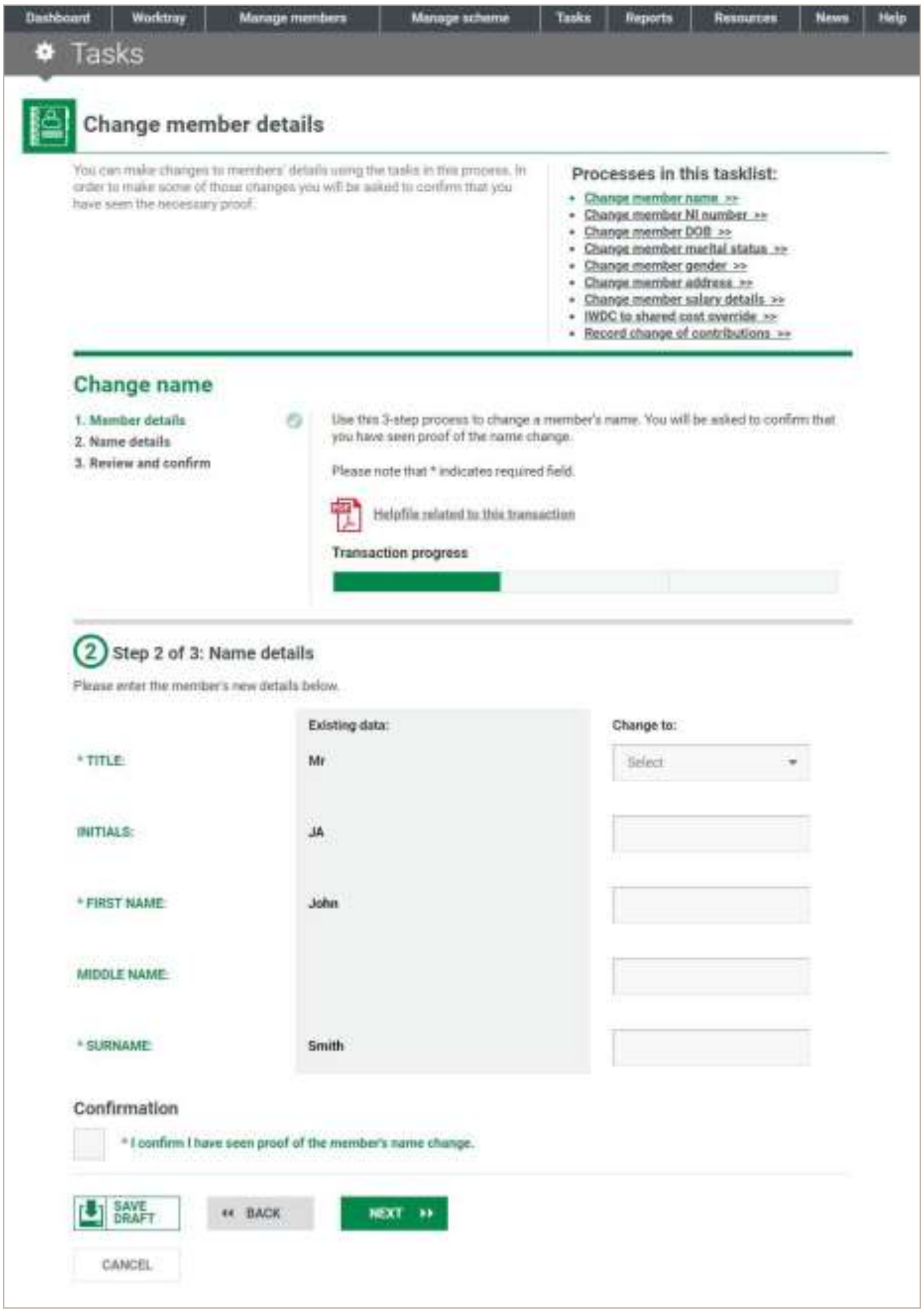
TASKS

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.

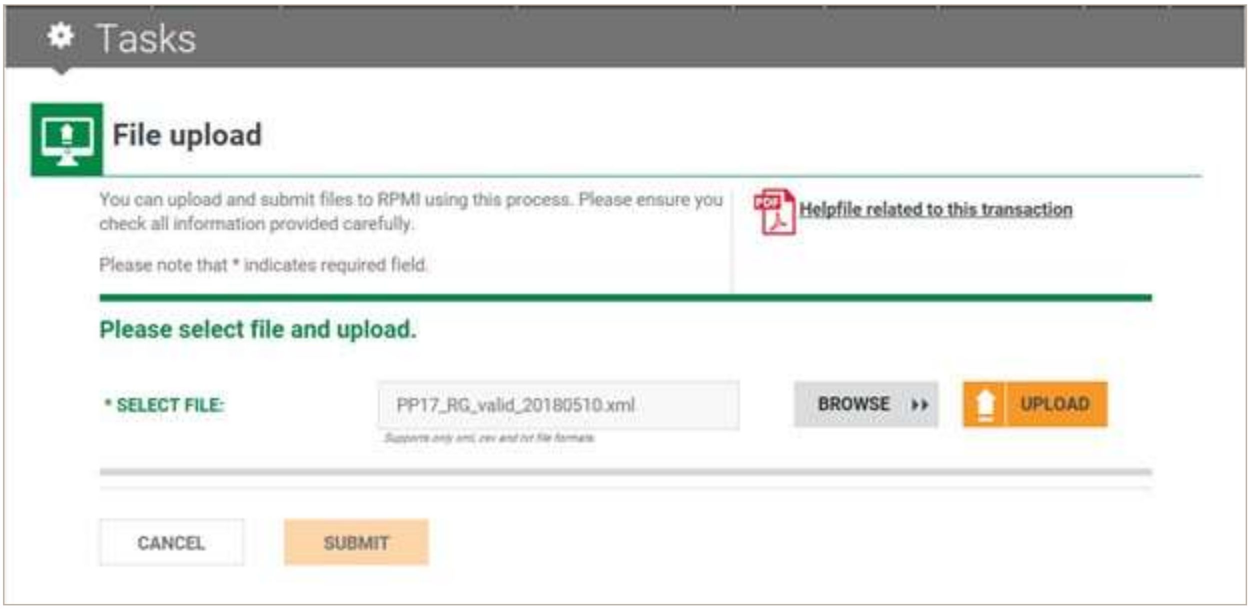
Most processes are self-explanatory and guide you through step-by-step. However, there are PDF help files and video walkthroughs, for the more complex processes. These not only explain the process, but tell you what you'll need before you start. For example, making sure member salaries are up-to-date.



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.



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