



LOCAL PENSION BOARD - 3 FEBRUARY 2020

REPORT OF THE DIRECTOR OF CORPORATE RESOURCES

MEMBER SELF SERVICE

Purpose of the Report

1. The purpose of this report is to inform the Board of improvements to the Fund's Member Self Service.

Background

2. In 2019 the Fund invested in a new Member Self Service (MSS) system from Heywood. Heywood provide the Fund's current administration system, so the new MSS now forms part of the main system.
3. Member's data is automatically fed from the main administration system securely into MSS, so the data scheme members see on MSS is their live data. This has large benefits as the information used in online calculations is now real time live data, posted monthly from the IConnect area of the system.
4. Members have a secure log in process which is password controlled with additional security questions, so members are restricted to only see their own personal data. The sign-up process is member led and requires less intervention by the Pensions Section.
5. The new MSS service allows for more independence in the development of the site and gives Officers more flexibility on the information shown to members.
6. The Fund is keen to move more work onto MSS to drive the scheme members experience and to improve the efficiency of the Pension Section.
7. In 2019 the Pension Section did several large communication exercises with scheme members to promote new MSS and to get members to sign up. This was extremely time consuming but very worthwhile with now over 22,500 scheme members live on the system. However, the Pension Manager wants to expend this further and aims to have 30,000 members live on the system by the end of 2020. The previous system had 26,000 users when it closed. This number was based over a 6-year period.

8. The Pension Section now use Google Analytics to monitor the site and since figures have been available, the site averages 2,000 users per week with a definite upwards movement week on week.
9. At the Pension Board Meeting on the 2 December 2019 Officers demonstrated the new MSS system to Board members. The Board were very supportive of the new MSS system and requested this report, briefly detailing the system.

What does the System Do?

10. There are several main areas for scheme members, split by the category of the member; active, preserved or pensioner. Members in more than one category have can see different areas of the system to fit their specific membership types.

Active Members

- View their annual benefit statements
- Run their own estimates (voluntary, redundancy and deferred value calculations)
- Adjust calculations to vary the amount of lump sum payable
- Get the latest valuation of their pension
- Update their address details
- See their death grant nominations and download a new form if they need to change those nominations.
- See up to date annual allowance information
- Change their security options (passwords, security questions)
- Submit queries directly from MSS which go straight to specific Pensions Teams
- Find information about the scheme regulations in both basic and detailed form

Preserved Members

- Run their own estimates for deferred pension into payment calculations
- Excluding certain calculations - They also benefit from the other items the active members have listed above

Pensioner Members

- View the latest annual value of their pension
- View and download their P60 – this uses the standard HMRC P60 layout.
- View their latest payslip information (this will also soon be downloadable in a more recognisable payslip format)
- Download a change of bank account form
- Excluding calculations - They also benefit from the other items the active members have.

Future Changes

11. The Fund has its own website. This will transfer over to new MSS, so all the online information will be in one place, within MSS. This will provide the benefit that scheme members using the website site, but who are not signed up to MSS, will be more likely to do so. It also means Officers will have all online information in one place and not have to update two separate online systems.
12. Officers are keen to expand what members can do via MSS. One major development for 2020 is to move the retirement process online. This will provide opportunity for members to complete their retirement more quickly as all transfer of information will be online and secure, avoiding timely and costly postage for those that wish to use it.
13. The Pension Section is looking at improvements to processes and its structure within 2020 and this will form part of that overall review. If this is successful, other processes will move online.
14. Other changes the Pension Section are considering;
 - Pensioners to have access to a downloadable payslip
 - Ability for members to have an online record of where we are in the process of dealing with their queries / requests for pensions into payment
 - To allow data to integrate with a national dashboard.
 - Develop analytical reports using Google Analytics to identify patterns of access to screens, numbers of users, busy periods etc.
15. Officers wish to work closely with some of the larger Fund's employers to promote MSS. By working closely with employers, the Fund hopes more people will sign up.

What is out of Scope?

16. The employers area of the current website will not move to MSS. This is because employers do not have a unique log in to MSS. If the system provider changes this in future Officers will look at this again at that time.

Recommendation

17. It is recommended the Board notes the report.

Equality and Human Rights Implications

None specific

Appendix

None

Officers to Contact

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