

## e-Services for group pensions



A solid foundation for the future

# Developing and improving e-Services

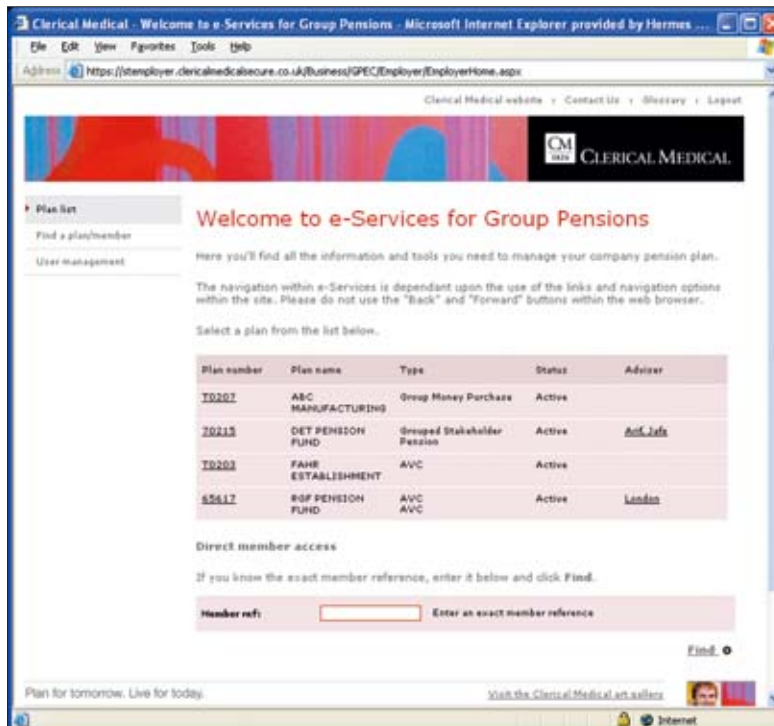
We understand how important the online management of your group pension plans is. Because of this we are dedicated to developing and improving **e-Services for group pensions** to give you the information and control that you need to efficiently manage your business.

This brochure will give you an overview of what **e-Services** can do to help you make the most of your business.

# Introducing e-Services

## An easier way to manage your group pension plans

**e-Services** has been designed to be an intuitive and efficient way of doing business. It streamlines administration, improves communications and provides you with invaluable support making it easier to review and maintain your plan.



Clerical Medical - Welcome to e-Services for Group Pensions - Microsoft Internet Explorer provided by Hermes ...

Address: <https://stemployer.clericalmedicabcare.co.uk/Business/GPEC/Employee/EmployeeHome.aspx>

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**Welcome to e-Services for Group Pensions**

Here you'll find all the information and tools you need to manage your company pension plan.

The navigation within e-Services is dependant upon the use of the links and navigation options within the site. Please do not use the "Back" and "Forward" buttons within the web browser.

Select a plan from the list below.

Plan number	Plan name	Type	Status	Adviser
TD207	ABC MANUFACTURING	Group Money Purchase	Active	
TD215	DET PENSION FUND	Grouped Stakeholder Pension	Active	<a href="#">Act Life</a>
TD203	FAHE ESTABLISHMENT	AVC	Active	
85617	856 PENSION FUND	AVC AVC	Active	<a href="#">London</a>

Direct member access

If you know the exact member reference, enter it below and click Find.

Member ref:  Enter an exact member reference

Find

Plan for tomorrow. Live for today. Visit the Clerical Medical act website

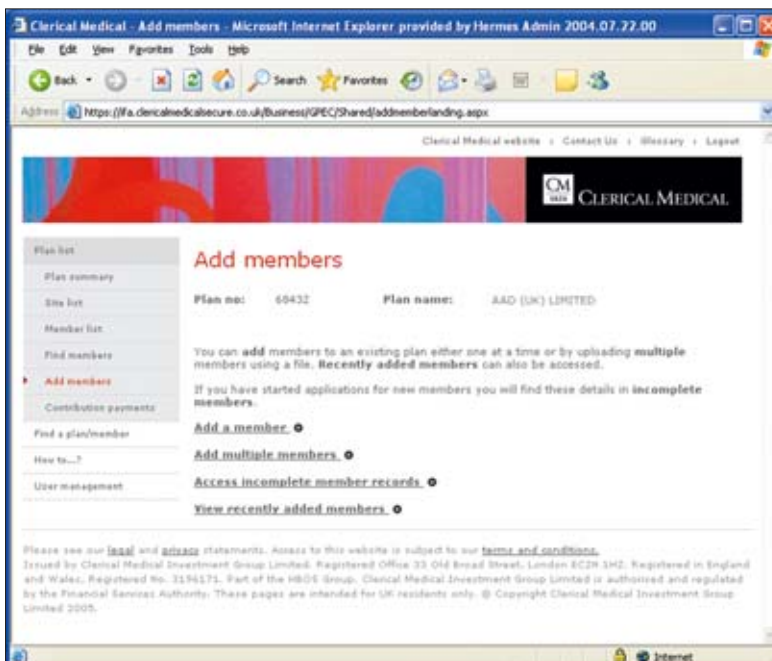
## ▶ Streamlined member joining

- No application forms needed
- Signature only authority form
- Upload member details
- Validate and submit online.

**e-Services** will allow members' details to be submitted online, removing the need to complete and post paper forms. It'll interface with your existing payroll data, so you can upload information you already have and know to be correct.

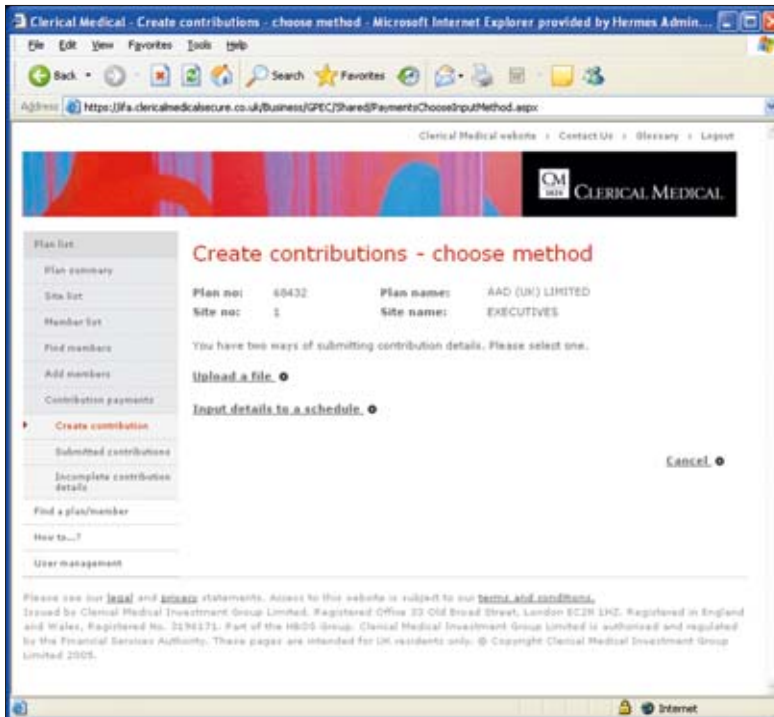
Member details will be automatically validated to ensure that the information we need is completed fully and that everything is accurate from the start.

And, as soon as members have been added online, you can start making contributions for them right away.



## ▶ Administration is easier

With **e-Services**, you can use your existing payroll data to arrange contribution payments. You'll be able to upload details of contributions and arrange payments online.



## ▶ Instant access to information

- View up-to-date information on your plans
- View historic plan contribution data
- Access member fund values and contribution history
- Update investment and personal details.

You can now review and update information about members and plans at a time that's convenient for you – all via one dedicated site.

## The right access for you

You'll be able to assign employer business roles for each user that will control what they can access through **e-Services**.

The functions an employer can perform for a member are dependent on the product that the member has. Normally, they'll have less access to contract based products, such as Group Personal Pension and Group Stakeholder Pension, than for trust based products. The functions that may not be available for contract based plans are highlighted in red.

	Supervisor	Senior administrator	General administrator	New business	Member updates	Benefits administrator	Contribution administrator (standard)	Third part administrator (standard)	Third party administrator (enhanced)
<b>Enquiry pages</b>									
Plan search	●	●	●	●	●	●	●	●	●
Plan general details	●	●	●	●	●	●	●	●	●
Site listing	●	●	●	●	●	●	●	●	●
Site summary	●	●	●	●	●	●	●	●	●
View site bank account details	●	●							●
View submitted contributions	●	●	●				●	●	●
View submitted new members	●	●	●	●				●	●
Member listing	●	●	●	●	●	●	●	●	●
Member search	●	●	●		●	●	●	●	●
Member summary	●	●	●		●	●	●	●	●
Member contribution history and breakdown	●	●	●		●	●	●	●	●
Member fund value and investment summary	●	●	●		●	●		●	●
View history of switches	●	●	●		●			●	●
Contact us	●	●	●	●	●	●	●	●	●
How to...	●	●	●	●	●	●	●	●	●
<b>Servicing pages</b>									
Add member single/bulk	●	●	●	●				●	●
Create contribution schedule	●	●	●				●	●	●
Submit contribution	●	●						●	●
Fund value illustration	●	●	●		●	●		●	●
Change member address	●	●	●		●			●	●
Change investments	●	●	●		●			●	●
<b>User management</b>									
Add and maintain users	●							●	●
Amend own user details	●	●	●	●	●	●	●	●	●

## Alerts

- Keep track of activity across your group pension plans.
- Check on new members being added to a plan.
- Confirm contribution schedules are submitted on time.
- Keep up-to-date with member fund instructions.

We've added a system of alerts to e-Services. You'll be able to pick up a range of alerts covering contributions, new members joining and fund switches/redirects. The alerts are all triggered by site activity, so you'll be able to keep track of what has been processed and when.

As well as selecting the alerts you want to receive as standard across all your group pension plans, you'll also be able to tailor the alerts you receive on specific plans.

**Clerical Medical** has been helping people plan for the future since 1824. We understand that investment decisions can be among the most important you make in life. After all, your financial choices today may determine what is possible in future years. We believe these decisions should be well informed, so we support you and your financial adviser with products and services that are comprehensive but uncomplicated.