London Borough of Bromley

Proposal for Member Self-Service

October 2020

1 Introduction

London Borough of Bromley (Bromley) has requested a proposal for the installation of New Member Self-Service.

This proposal provides the cost of installing New Member Self-Service (MSS), including Address Look-Up through a Hybrid Hosting solution. We are pleased to offer discounted pricing if Bromley also commits to i-Connect at the same time, as detailed in our separate i-Connect proposal.

Aquila Heywood

2 Business Case for MSS

Pension departments are under increasing pressure, with ever growing call volumes and queries from scheme members. With regulatory changes now recognising web communication as legitimate for disclosure purposes, there has never been a better time to use web services to increase scheme member engagement, provide a better service and drive down costs.

The use of a truly integrated technology solution means that there are no issues with overnight synchronisation of databases to ensure that data is aligned, validated and current. In addition, the benefit calculation routines in the Self- Service website will be aligned and consistent with the routines in Altair. The Aquila Heywood suite of applications provides a consistent approach to the submission and access of data in real-time and means that scheme members can access the current data being used by the administering authority.

MSS is highly configurable, providing clients with the flexibility to tailor the extensive range of options and facilities available to scheme members. It is fully integrated with Altair, providing a comprehensive solution. MSS provides members with an easy to use interface to the pensions department. The interface will enable members to access information, undertake data amendments, view their documents and carry out benefit projections online, without taking up valuable administration staff time.

Using MSS, the pensions department can choose to offer a range of services and information to their members, prospective members, actives, deferred members and pensioners. In addition, usage can be monitored using website statistics.

Aquila Heywood

3   New Member Self-Service

The Solution

MSS provides internet and intranet facilities to enable all employees, past, present and future to access their individual information, update data, view documents and carry out "What if…" modelling.

Functionality includes:

- Full support for multiple devices, such as tablets and mobile phones, delivered in a modern looking, clean and responsive design

- Fully integrated with Altair Pensions components

- Ability to combine an existing static content website with MSS

- Social media integration

- Online benefit calculations for members

- Online benefit statements that pull data straight from the Altair database with no administrative intervention

- General scheme documentation can be uploaded for members to access along with Altair documents generated

- Members can view and update personal details such as address and benefit nominations. The updates can write straight back to the Altair database, start a workflow or notify administrators via e-mail

- Members can upload documents and forms via MSS which trigger a workflow in Altair

- Ability for members to track workflows in Altair

- Strict security controls. Members register and manage their own passwords and security questions and answers.

Aquila Heywood
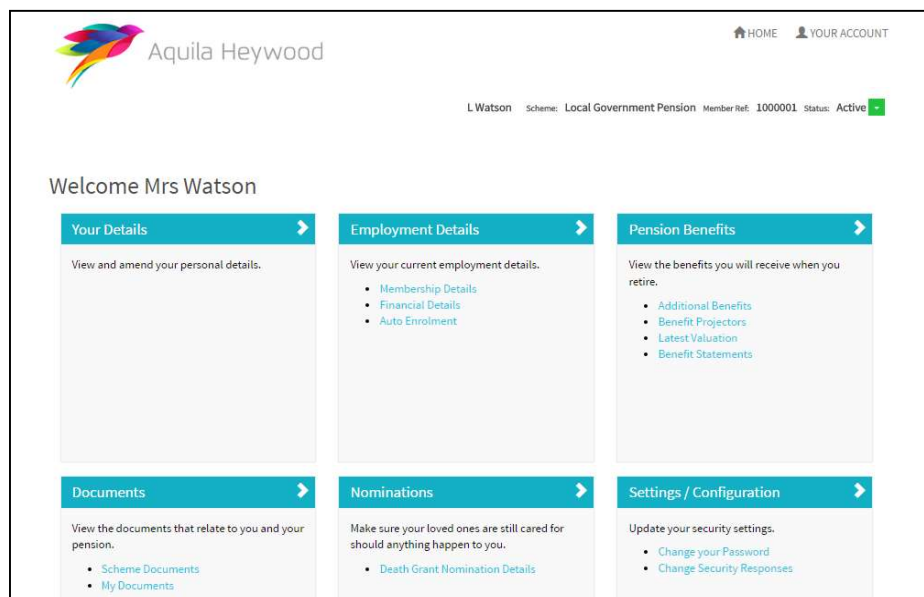
Members can access their individual information, update data,
view documents and carry out "What if…" modelling.

The Value

The benefits of MSS include:

- **Improved member engagement** - a customised website experience for members across multiple devices

- **Meeting member expectations** - delivering the digitalised services they expect

- **Enhanced service to members** - more personalised information, delivered more quickly, and at a lower generic cost

- **Increased efficiency** - enabling administrators to concentrate on key strategic activities rather than focus on mundane administrative tasks

- **Simple to use content management tools** - faster content deployment and greater flexibility in the enhanced 'look and feel' of the website allowing administrators to make changes to the website with no prior HTML knowledge

- **Highly configurable** - providing the flexibility to tailor the extensive range of options and facilities available to its scheme members

- **Robust industry standard security** - keeping your data safe and ensuring compliance with your security policies and standards

4 Address Look Up

The Solution

Altair and Member Self-Service users can validate addresses and postcodes using a third-party database.

When this facility is enabled, a search icon is present alongside the Postcode field on member related address screens.

Entering a valid postcode and clicking the search icon displays a list of associated addresses, from which a selection can be made:
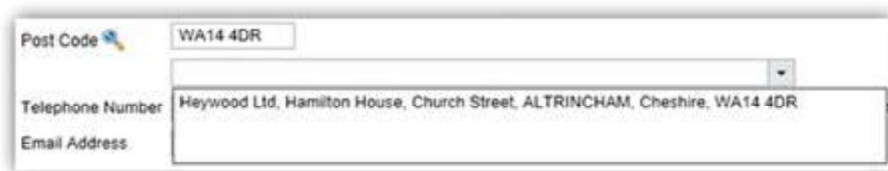
The Value

- Helps to ensure that postal addresses up-to-date and correct, increasing accuracy and less 'gone away' post.

- Reduces wasted postage and administration overhead.

Aquila Heywood