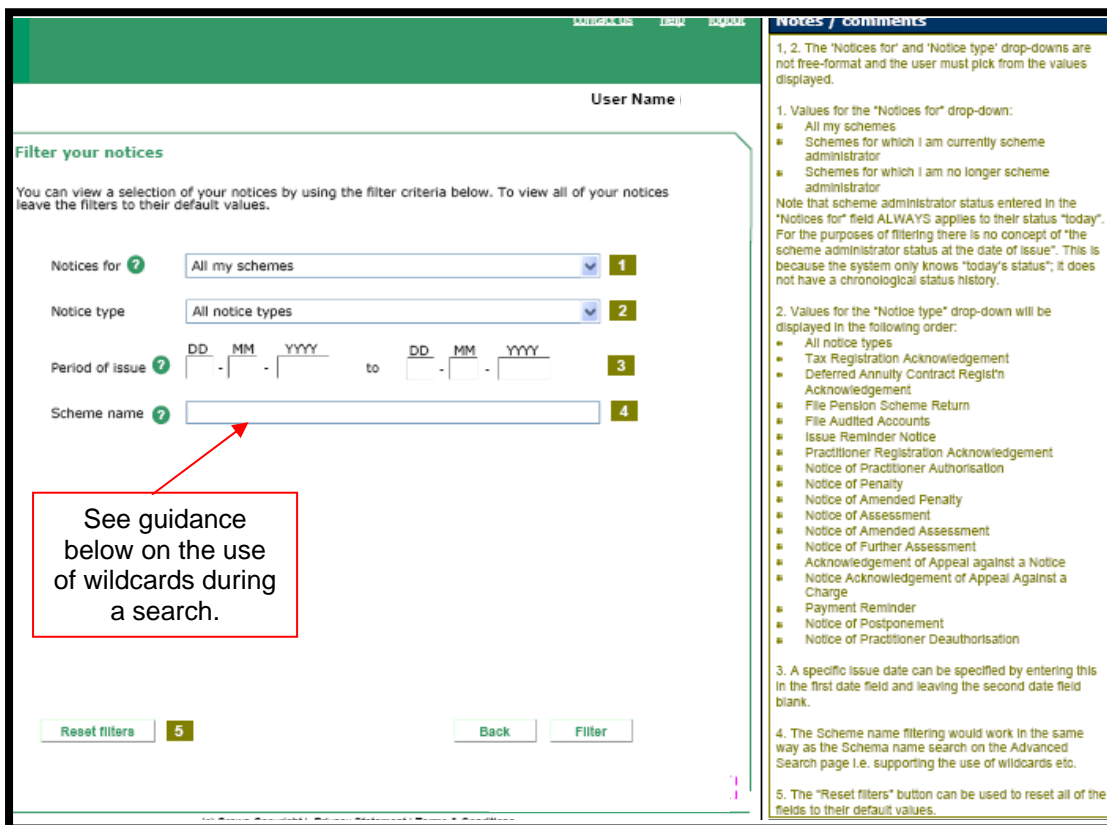
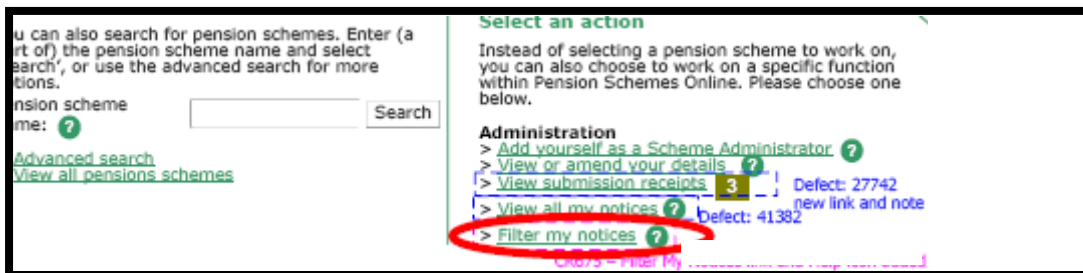


Forthcoming improvements to Pension Schemes Online

We have made some improvements to Pension Schemes Online and they are scheduled to be implemented from 23rd November 2009. The improvements are

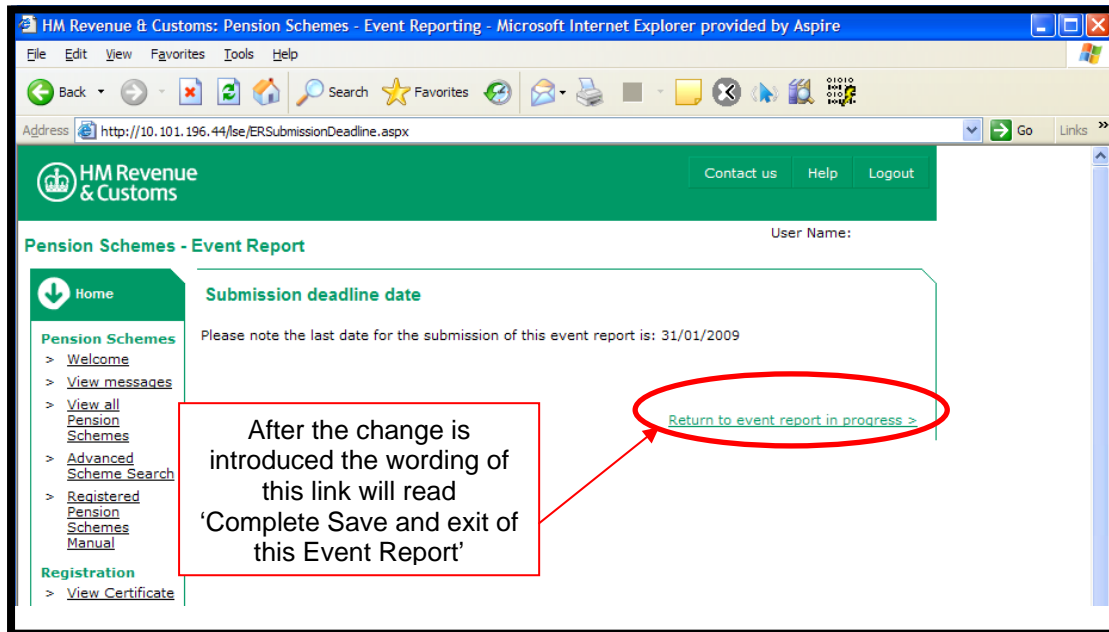
a) The option to filter Notices for scheme administrators

High volumes can be an issue for scheme administrators who are responsible for a number of schemes. To help make it easier we have now introduced a further option. On the Welcome page a new link has been added called 'Filter my notices'. When selected this will take you to a new page from where you can select any of 4 pre-defined filters in order to reduce the number of notices displayed at any one time. Help text will be available to help you to use this new screen successfully. This can be accessed by selecting the help icon (?) on the screen. Please see the screen shot samples below of the amended Welcome page and also the newly created filter page. (NB this functionality is only for scheme administrators.)



b) Amendment to the Link on the Event Report

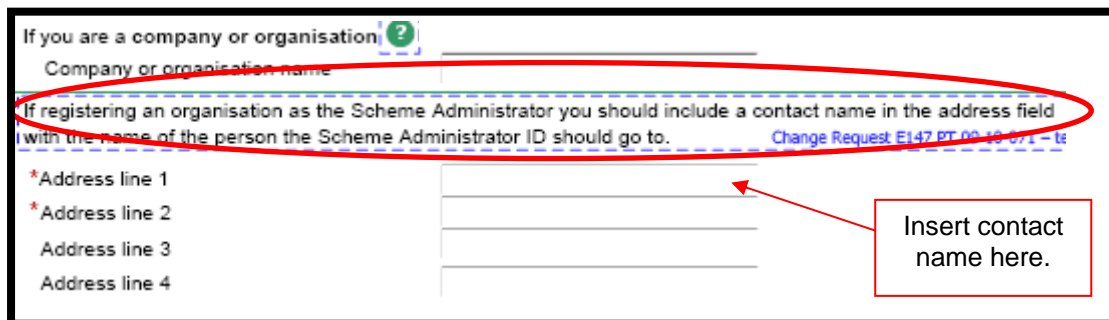
To ensure that Event Reports are correctly saved, and to avoid the creation of an incomplete task the final link called 'Return to Event report in progress' must be selected as shown in the screen shot below. We have received feedback that suggests this is not clear from the heading on the link so some of you have not been selecting it and have lost partially completed Event Reports. To make it clearer the heading on the link will now be



'Complete Save and Exit of this Event Report'. Additional guidance has been included in section 9 of the [Online user guide](#). A new version of the Online User Guide will be published to co-ordinate with this release to include the new wording for this link.

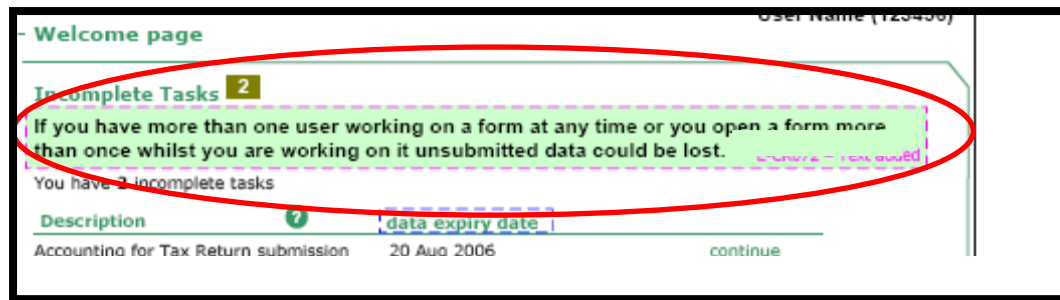
c) A contact name added to Online Pre-registration

We have received feedback from organisations that correspondence is not getting to the right person because it is not clear that they can include the name of an individual as well as the organisation when completing the pre-registration process. We have, now added a message to ask you to include the name of the person to whom correspondence should be issued on the first line of the address field, as shown on the screen shot below. This advice is included in the pre-registration guidance within the [Online user guide](#)



d) An Online Multiple User Warning Message

Unsubmitted data can and does get lost if more than one person accesses a form at the same time or when a user opens multiple versions of the same form. To avoid you losing data in this way we have introduced a warning message (as per the screen shot below) on appropriate screens. This message will appear on the Pension Schemes Online 'Welcome' page and at the start of the Accounting for Tax return, Registered Pension scheme Return and the Event Report. Guidance has been included in the version of the [Online User Guide](#) published at the end of October 2009.



e) Incorrect Pension Scheme URLs

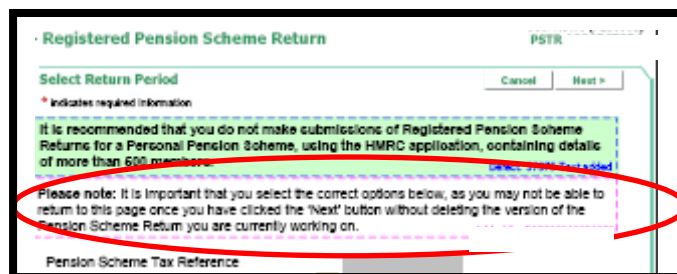
Some of you have problems when you try to add Pensions Online to your existing services because you have been given an incorrect URL. We have introduced a change to prevent this problem happening.

f) Client reference displayed under user name

Some practitioners when navigating to the Practitioner Overview Page find their client reference is displayed under the user name. We have introduced a change to prevent this problem happening.

g) Registered Pension Scheme Return- select return period page

Some scheme administrators and practitioners were returning to partially completed Registered Pension Scheme Returns using the 'back' buttons to review the details compiled to date and by selecting the 'cancel' button on the first page; Return Period Page, they were deleting the entire contents of the submission compiled to date. To make scheme administrators aware that reviewing the return in this way they will lose the data input a warning message have now been added to the first two pages of the Registered Pension Scheme Return and you will no longer be able to return to these pages once details have been compiled within the report. This will prevent you from accidentally deleting the return. Please see the screenshot below:



h) Errors on the Registered Pension Scheme Return overview.

By using 'copy & paste' when compiling the Registered Pension Scheme return scheme administrators and practitioners have been able to enter decimal points and pence figures in some monetary fields where the system is not designed to include them. This has meant that when you navigate away from the page you cause a system error locking the return. The functionality will now stop this from happening in future. Please note entries on all returns must be whole pounds only.

i) View all schemes system error

Scheme administrators who cease and then recommence will no longer receive a 'system error' message when they select the link headed 'View all schemes'

Wildcard search Guidance (please see (a) above, particularly the second screenshot).

Currently the wildcard feature allows a user to broaden their search by using the symbol '%'. The % wildcard can be substituted for a character anywhere within the field being searched, including the first letter. The % wildcard character acts as 'match anything' within the field being searched. If the wildcard % is used in conjunction with other characters it acts as 'match anything with' for the field being searched.

The wildcard search functionality works best when the % sign is used with at least one other character or word. Examples of different scenarios are shown below –

- 1) Searching with M%cDonald will find both McDonald and MacDonald.
- 2) Searching with %Test Scheme will find the every pension scheme ending with Test Scheme. For example; Pension Test Scheme, ABC Test Scheme, Test Scheme, etc.
- 3) Searching with just % will return all the pension schemes
- 4) Searching with %' % will find all the pension schemes containing the character ' in either the pension scheme name or the establisher name. For example; M N O'Neill Ltd Retirement Benefits Scheme
- 5) Searching with A%&% will find all the pension schemes which contain A as the first character in the field being searched followed any character but containing '&' later in the searched field. For example; - A & C SCHEME