

Appendix B

Instructions on how to email New Starter Packs by email using the New Joiner Tool

Detail

You can now use the New Joiner Tool to email starter packs to new entrants.

We've provided a step by step breakdown showing how to use the new email functionality within the New Joiner Tool. Please see the print screens below for help and guidance.

Please note, the forms contained in the New Starter Pack can be accessed via the following within the email template.

Link 1 – The relevant Overview document

Link 2 – An editable version of the relevant Pensions Choices form

Link 3 – The Partner Details form (not mandatory)

Create email option

Step one

Click on New Joiner Tool link to choose the appropriate scheme for the new entrant. You will see that an additional button, 'Create email', has been added to the footer of the tool.

The member can join (or re-join) one of the following schemes:	Scheme - premium or partnership
The member should be sent pack:	alpha
The following paragraph should be used in the pack:	alpha Paragraph A
Does abatement apply (CSP13)?	
Should addition wording be included about compensation?	
Should addition wording be included about quarantine?	
Should the original award be cancelled?	
Use declaration message:	
Interface message:	
Public Service message:	

Error Messages

Check Version Number.

Create PDF and SaveCreate email

Audit
13:05, 15 Apr 2021 .
Filename : \\MCCLPRDFSSM385VXDrive\Liverpool\Jon Vaughan\New joiner tool\Joiner Tool - Premium Test.xlsm
Version number : 104.
Tool expires on 01/04/2016.
PDF saved to : TBC

END OF FORM

Step 2 – Email the pack to new entrant

Click on 'Create email' button.

The member can join (or re-join) one of the following schemes:	Scheme - premium or partnership
The member should be sent pack:	alpha
The following paragraph should be used in the pack:	alpha Paragraph A
Does abatement apply (CSP13)?	
Should addition wording be included about compensation?	
Should addition wording be included about quarantine?	
Should the original award be cancelled?	
Use declaration message:	
Interface message:	
Public Service message:	

Error Messages

Check Version Number.

Audit

Once you have clicked on this, the next screen below will appear.

The member can join (or re-join) one of the following schemes:	Scheme - premium or partnership
The member should be sent pack:	alpha
The following paragraph should be used in the pack:	alpha Paragraph A
Does abatement apply (CSP13)?	
Should addition wording be included about compensation?	
Should addition wording be included about quarantine?	
Should the original award be cancelled?	
Use declaration message:	
Interface message:	
Public Service message:	

Error Messages

Check Version Number.

Email [X]

Options

Option 1 - Email form

Option 2 - Generate email text to clipboard

Name

Email Address

Browser:

Internet Explorer

Google Chrome

Microsoft Edge

Audit

13:05, 15 Apr 2021.
Filename : \\MCCLPRDFSSM385XDrive\Liverpool\Jon Vaughan\New joiner tool\Joiner Tool - Premium Test.xlsm
Version number : 104.
Tool expires on 01/04/2016.
PDF saved to : TBC

END OF FORM

To use the Email form option:

- add the new entrant's name and email address into the box that appears on the screen; and
- select the internet browser option that you are using from the options in the 'Browser' box.

The new entrant's name will appear on the template exactly as you have typed it here, so you will need to use capital letters where appropriate and the correct title (if required).

Once you have completed this section, Click the 'Go' button.

The member can join (or re-join) one of the following schemes:

The member should be sent pack:

The following paragraph should be used in the pack:

Does abatement apply (CSP13)?

Should addition wording be included about compensation?

Should addition wording be included about quarantine?

Should the original award be cancelled?

Use declaration message:

Interface message:

Public Service message:

Error Messages

Check Version Number.

Email

Options

Option 1 - Email form

Option 2 - Generate email text to clipboard

Name

Email Address

Browser:

Internet Explorer

Google Chrome

Microsoft Edge

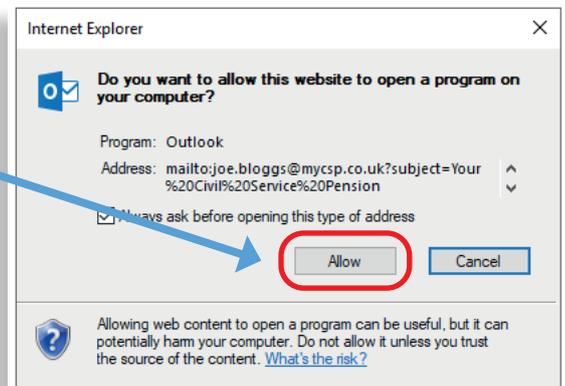
Audit
13:05, 15 Apr 2021.
Filename : \\MCCLPRDFSSM385XDrive\Liverpool\Jon Vaughan\New joiner tool\Joiner Tool - Premium Test.xlsm
Version number : 104.
Tool expires on 01/04/2016.
PDF saved to : TBC

END OF FORM

After pressing the 'Go' button, there will be nothing else on the screen apart from this link:

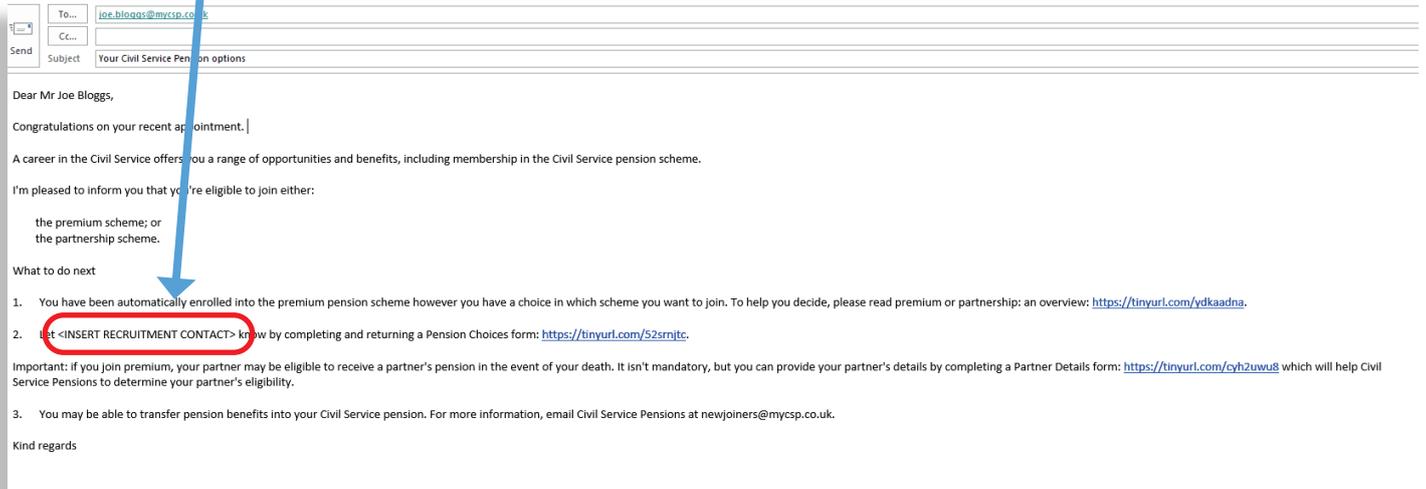
[Click to generate email](#)

Clicking the 'Allow' button will generate a pre-populated email template.



Clicking the 'Allow' button will generate a pre-populated email template .

Before sending the email, you must insert the relevant recruitment contact email address (**Point 2, 'INSERT RECRUITMENT CONTACT'**). This will be where the new entrant will return the forms contained in the New Starter Pack for processing.

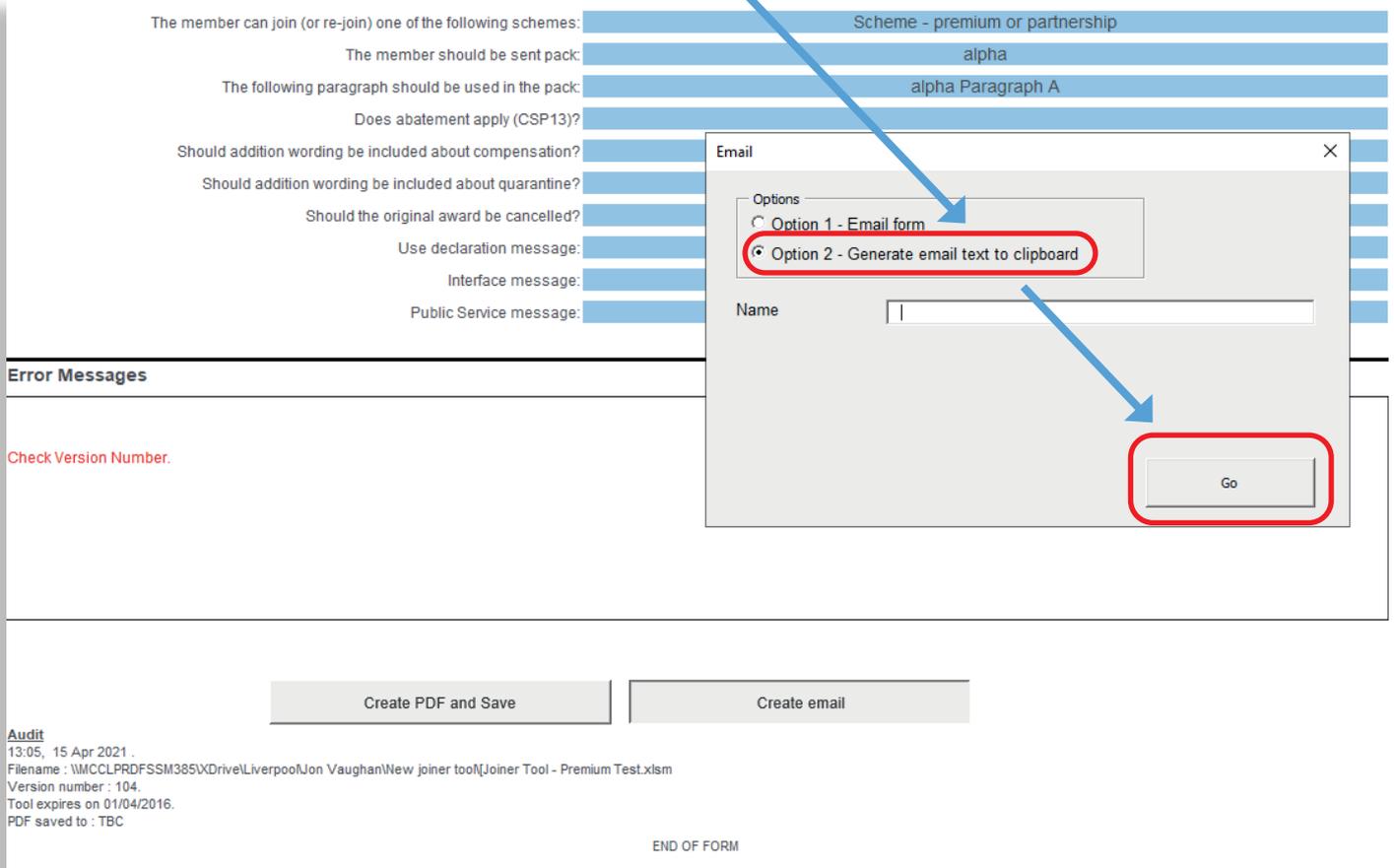


Step 3 – Generate email text from clipboard Option

If you selected Option 1 – Email Form and you are unable to email the New Joiner Pack using this option, this may be due to a configuration setting which cannot be changed within your organisation.

If this is the case, you can click on Option 2 – Generate email to clipboard instead.

Click on Option 2 – Generate email text to clipboard and type in the new entrant's name as you would want it to appear in the salutation and press the 'Go' button.



Once you have pressed 'Go', this screen below will appear.

Based on the above results the following actions should be taken :

- The member can join (or re-join) one of the following schemes: **Scheme - premium or partnership**
- The member should be sent pack: **alpha**
- The following paragraph should be used in the pack: **alpha Paragraph A**
- Does abatement apply (CSP13)?
- Should addition wording be included about compensation?
- Should addition wording be included about quarantine?
- Should the original award be cancelled?
- Use declaration message:
- Interface message:
- Public Service message:

Error Messages

Check Version Number.

Email [X]

Options

- Option 1 - Email form
- Option 2 - Generate email text to clipboard

Name: Microsoft Excel [X]

Email text generated and copied to clipboard

OK

Go

When that screen has appeared, go into your usual email and create a new email so it appears blank (as if you are sending a new email). Once you have done that, Click on File Paste or Control V to paste the content.

Send

To... []

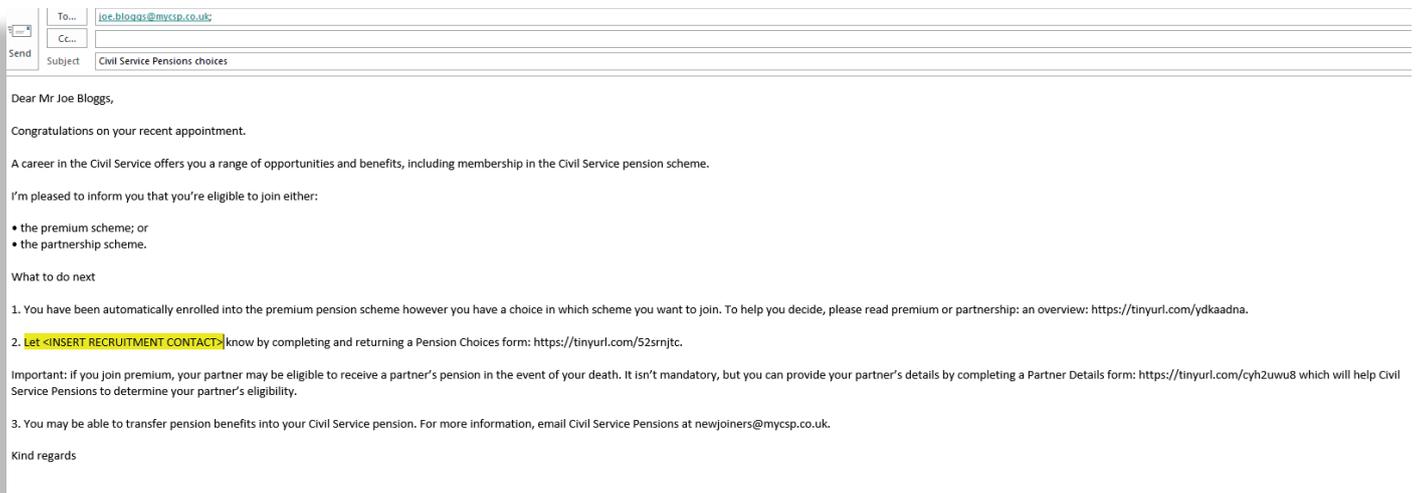
Cc... []

Subject []

Once you have clicked on the paste function, the template below should appear in your blank email.

This looks the same as the email template; however, you will need to manually type in the new entrant's email address in the 'TO...' field and email heading as '**Civil Service Pension Options**' in the 'SUBJECT' field.

You will then need to update the 'LET RECRUITMENT CONTACT' field manually with freeform text showing the appropriate email for the member to return the forms to.



The screenshot shows an email composition window with the following fields:

- To: joe.bloggs@mycsp.co.uk
- Cc:
- Subject: Civil Service Pensions choices

The email body contains the following text:

Dear Mr Joe Bloggs,

Congratulations on your recent appointment.

A career in the Civil Service offers you a range of opportunities and benefits, including membership in the Civil Service pension scheme.

I'm pleased to inform you that you're eligible to join either:

- the premium scheme; or
- the partnership scheme.

What to do next

1. You have been automatically enrolled into the premium pension scheme however you have a choice in which scheme you want to join. To help you decide, please read premium or partnership: an overview: <https://tinyurl.com/ydkaadna>.
2. **Let <INSERT RECRUITMENT CONTACT>** know by completing and returning a Pension Choices form: <https://tinyurl.com/52srnjtc>.
3. You may be able to transfer pension benefits into your Civil Service pension. For more information, email Civil Service Pensions at newjoiners@mycsp.co.uk.

Kind regards

Once you have entered the new entrant's email address, email heading and appropriate recruitment contact email address, this email is ready to send to the member.

Step 4 – Requesting a New Starter Pack

Please Note: if both options fail due to your organisation's IT configurations, you can request a New Starter Pack to be emailed by sending the new entrant's details to starterpacks@mycsp.co.uk

If you receive a starter pack for a new entrant who is not within your organisation, which has been returned from a new starter, **please do not forward this on anywhere and let the appropriate contact on the email address know this has been received in error.**

They can then send a New Starter Pack out again detailing the correct email address for it to be returned to.