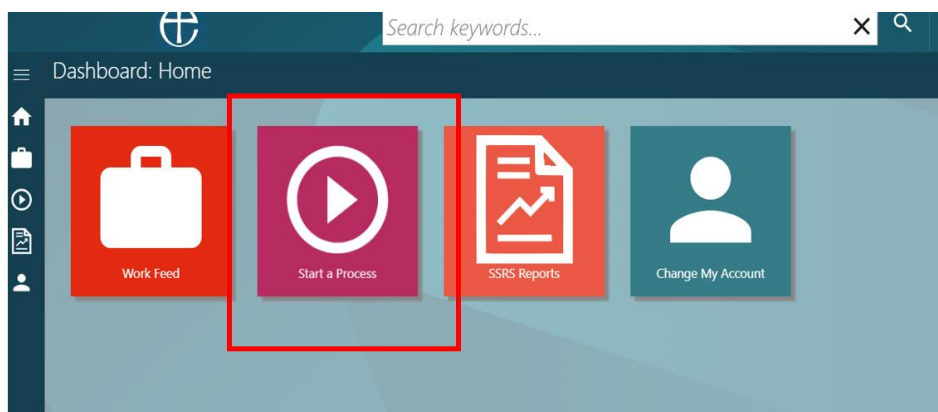


Ask a question or upload a document about a member

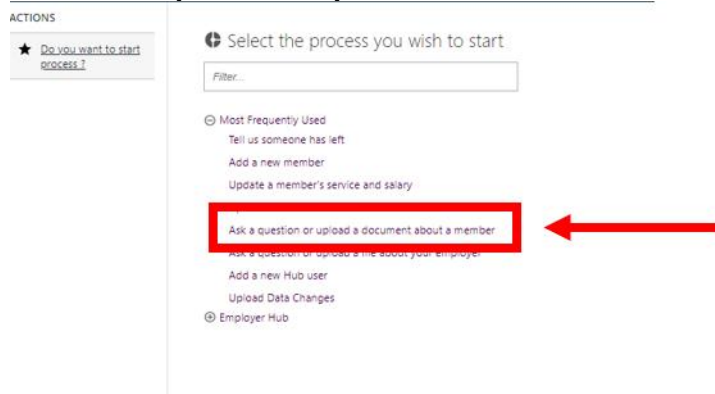
This process is useful if you have questions about a member's pension. You can also use this process to upload documents such as an AVC form.

We will response to any queries via Hub. All queries and responses are saved in the documents section of the member folder.

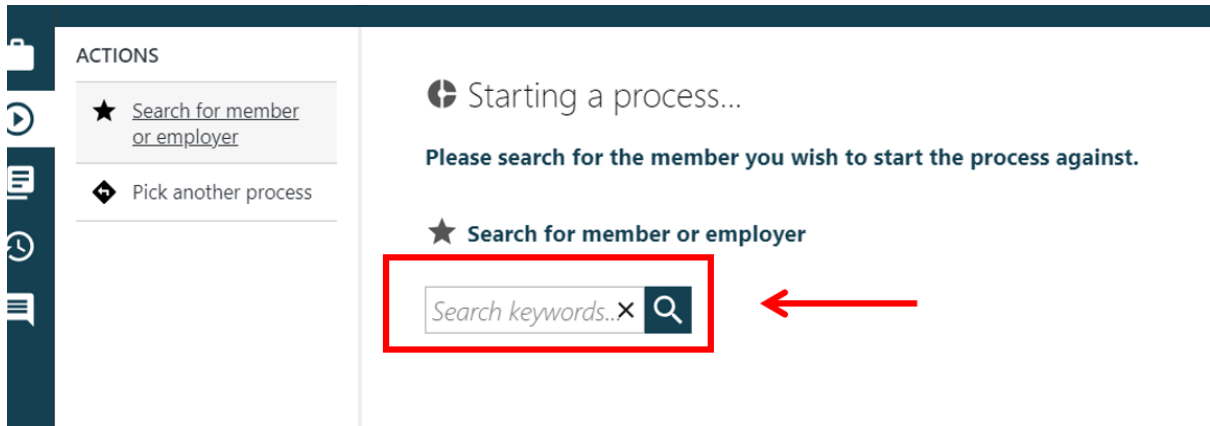
To ask a question or upload a document about a member, click on the 'start a process' tile on the home page.



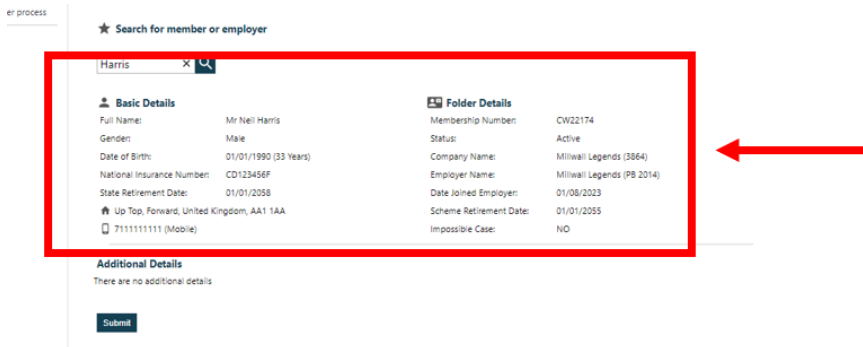
Select 'Ask a question or upload a document about a member' from the process list.



Search for the person whose details you are updating, by either typing in their **surname**, **National Insurance number** or their **Pension reference number** in the search bar, then **hit enter** or **click on the magnifying glass**.



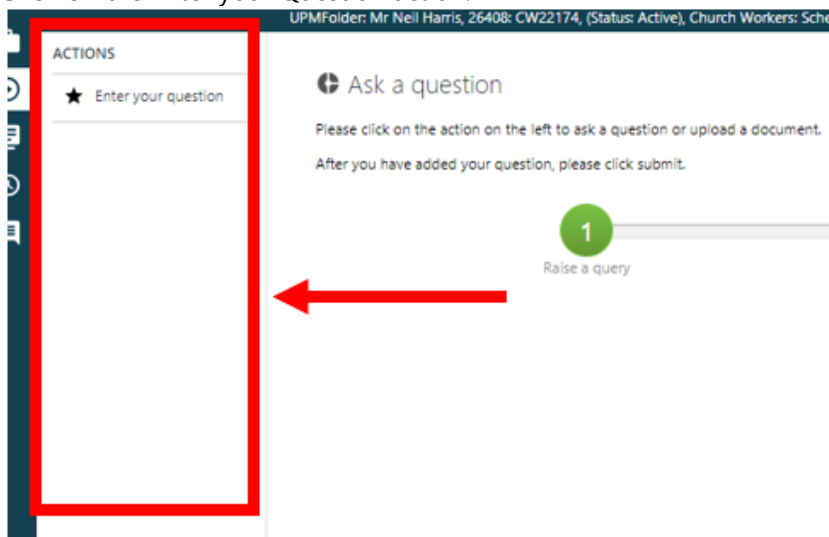
Select the member that you are asking a query about and you'll be shown the basic and folder details of the person you have selected. If this is the correct person, click 'Submit'.



Once you have clicked on submit, you have created a 'work item' or 'process' on Hub. See the **Work Feed guide** on how to navigate through the Work Feed and assigning work items/processes to users.

Once the process has been assigned into your work tray, you can action it. **Click on** the process in your work tray.

To help you through the process, you will be guided down the **Actions pane** on the left-hand side. **Click on** the Enter your Question action.



Type in your question which you would like to ask. You will then need to specify if you are uploading a document. This is a mandatory action.

If you **are** uploading a document, choose **yes**. If you **are not** uploading a document, choose **no**.

★ Enter your question

ASK A QUESTION

Please click on the action on the left to ask a question or upload a document.
After you have added your question, please click submit.

1 Raise a query

2 Upload supporting documentation

★ Enter your question

Please add your question *

Do you need Do you need to upload a document? is mandatory.

Please Select

Save Submit

If you select no supporting documentation, then you can **click** on the **'send query to CofE Pensions Board'** action in the **Actions pane**.

Work Item Processing: stdWebWF360 Member Query / File Upload

PMFolder: Mr Jack Read, 27680: CW25467, (Status: Active), Church Workers: Scheme

ACTIONS

- ✓ Enter your question
- ✓ Go down next available route
- ◆ Send query to CofE Pensions Board

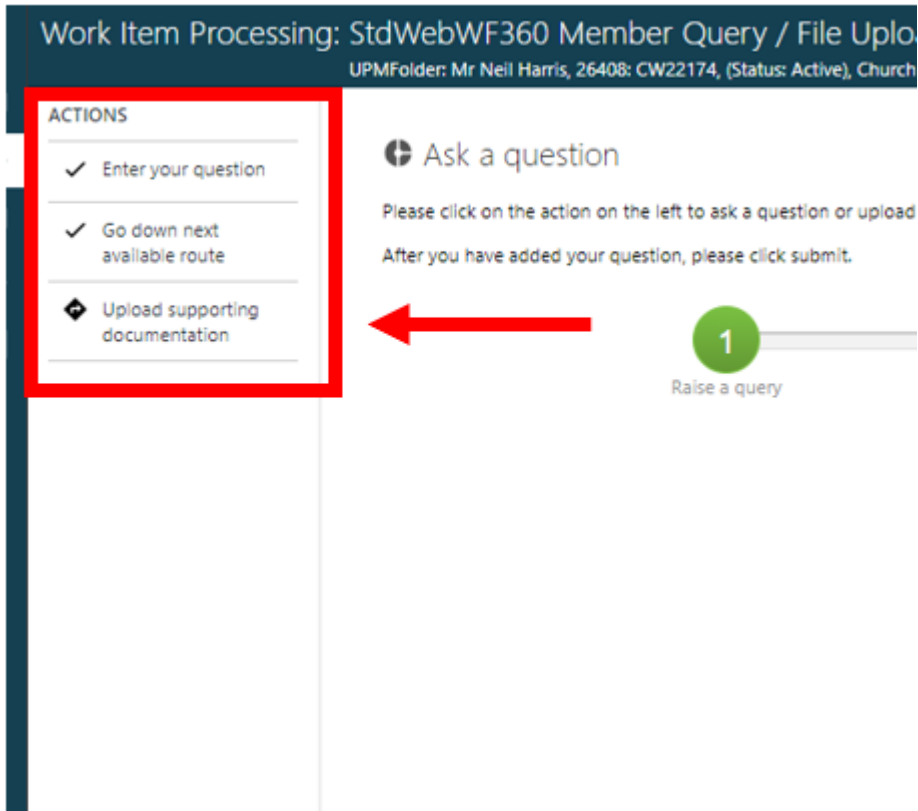
Ask a question

Please click on the action on the left to ask a question or upload a document.
After you have added your question, please click submit.

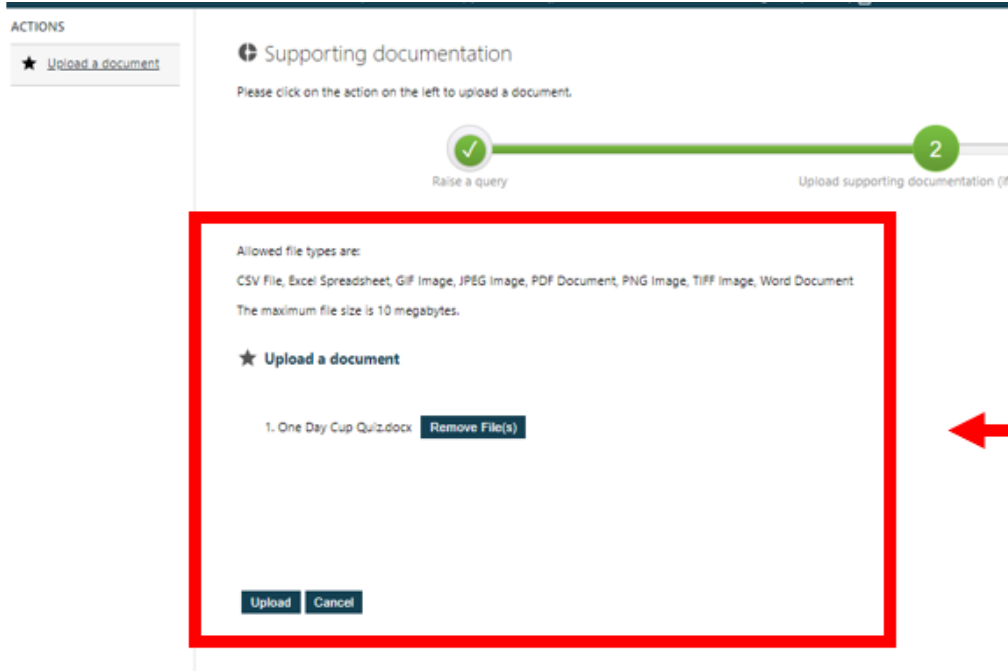
1 Raise a query

2 Upload supporting documentation (applicable)

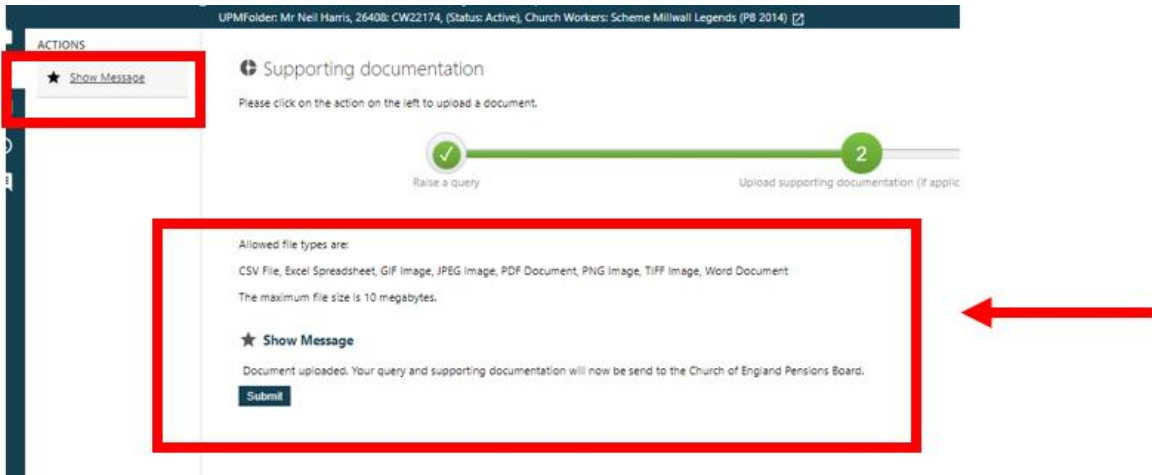
If you select yes for uploading supporting documents, you will need to **click** on the action **'upload supporting documentation'** which is in the **Actions pane** on the left.



Click on **add file(s)** and **select the file you are uploading from your computer**. You will then see the document listed on the page. If you are happy with this document, then **click upload**.



In the **Actions pane**, you will need to **click on 'Show message'** which will display your document and query, and whether you are happy to send the query. **Click on submit** if you are happy to send your query.

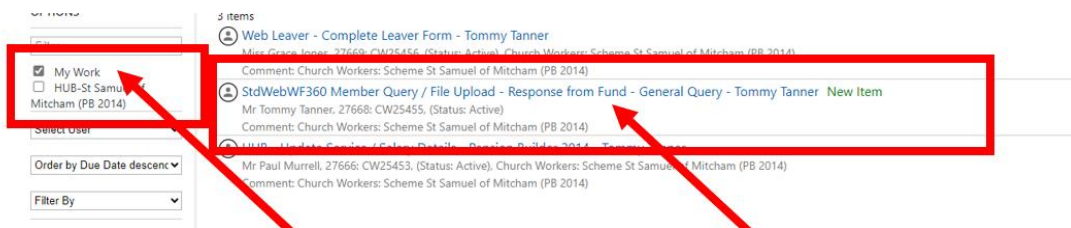


Your last action in the **Actions** pane is to **click on send to cofe pensions board**, and your message will be sent.

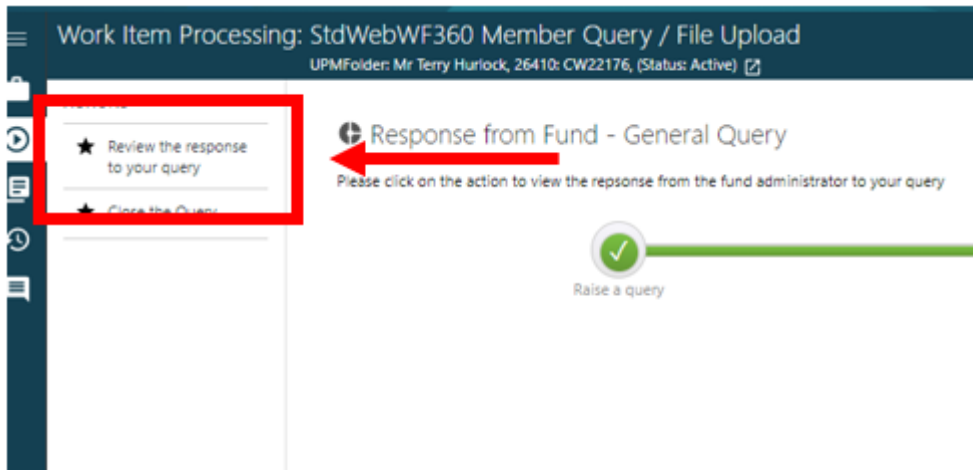
Receiving a response

If you need a response from us about your query, we will usually send a response **within 10 working days**. The response will appear in Hub, in your work tray, called 'My Work'.

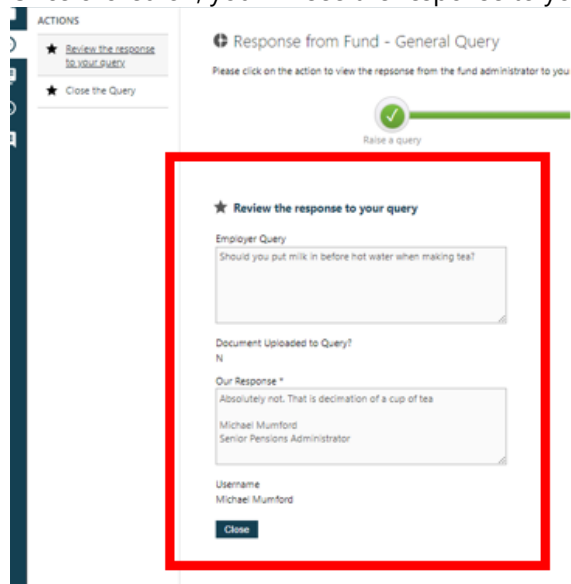
Go into your Work Tray and click on the work item/process. You will notice that the response will say on the work item 'response from fund'.



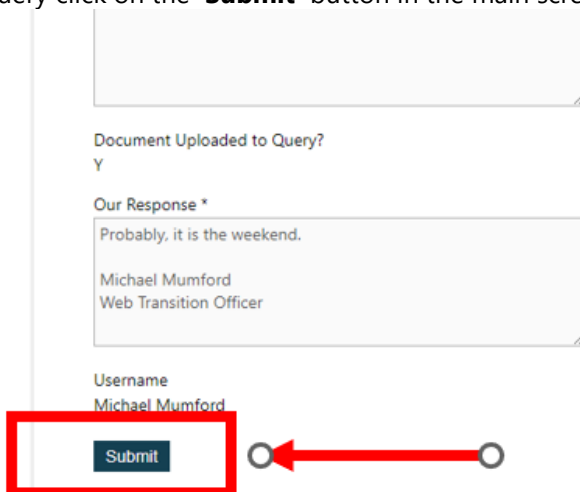
You will then need to **click on the 'Review the response to your query'** action in the **Actions** pane on the left.



Once clicked on, you will see the response to your query.



To close the query click on the **'Submit'** button in the main screen.



Then click on the **'Close the query'** action in the **Actions Pane**, and then the **submit button**.

The process will be completed and be removed from your Work Tray.

The query and its response will be saved on the **member's folder**. To see how to access a member's folder, see the **Additional Functions** guides.

