

## Online Services - Product Outlines

### **SIPP~Web**

SIPP~Web was developed in response to the increasing demand for member and adviser access to SIPP data on the Internet. The module enables system users to publish member data held in the SIPP~Pro database via their own website, which in turn links to a unique URL supplied by Delta.

The process involves uploading data from SIPP~Pro to a secure remote SQL database and using ASP web pages to publish the data. Access to the web site is secured using SSL.

Member and adviser access to the site is controlled by the user by granting unique user names and passwords, which are recorded on SIPP~Pro. Advisers are able to view the records of all of their clients whereas the member would only be able to view details of his own SIPP.

The following pages are available on SIPP~Web although any can be suppressed if required:

- Member Data - Name, Address and Personal Details
- Employment Information
- Earnings and Contribution Limits
- Contribution and Transfer In History
- Adviser Details
- Asset Valuation
- Bank Transaction History
- Drawdown information

The data displayed is static based on the previous night's data held in SIPP~Pro. Advisers and members are able to view and print details only.

Pension Input Certificates are available for printing from the Contribution History screen and the Asset Valuation and Bank Transaction data can be sorted and filtered by the user to create printable reports.

The design elements of the SIPP~Web pages have been kept to a minimum but users are able to specify their own design requirements as customisation at additional cost. Furthermore system users are not restricted to using SIPP~Web and can arrange separately with their own IT department or external contractor to upload and publish the data on the Internet.

### **Online Application Form Module**

There is an increasing demand from advisers and members to be able to complete SIPP application forms via the internet.

The Online Application Form (OLAF) Module enables SIPP operators to offer the completion of a PDF of their application form on their website. Different application forms can be created under different brandings, with each branding used by many different advisers or a brand may be exclusively used by just one adviser.

There are two types of users on the web pages, one for an adviser and another for a member. Advisers are created and administered by the Scheme Administrator using the DMM. They are then linked to a scheme or, if the product is being “white labelled” or “branded”, to a brand. Advisers’ access to application forms on OLAF is restricted by reference to the brand and adviser company, which means that they can only see applications created under a specific brand associated with their company. They will not see other adviser company created application forms for that brand and they will not see any member generated application forms.

Members can complete their own application form by logging in using a self serving mechanism.

Data is entered into each field and the form is validated to ensure that all required fields have been completed. The form can be amended and saved any number of times prior to submission. The form is then printed, signed by the member and returned to the SIPP operator for processing.

Upon receipt the operator is then able to download a text file of the membership data directly from the OLAF database into SIPP~Pro at the click of a button, thus reducing processing time and the possibility of inputting errors.

**Demonstrations of the SIPP~Web and OLAF Modules are available on the Delta ([www.deltafs.co.uk](http://www.deltafs.co.uk)) under SIPP~Pro -Online Services, where it is possible to view both the adviser and member log on facilities.**