My Scheme Intelligence (MySI)

Frequently asked questions

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Dashboard technical

What is the recommended web browser for using MySI?

We recommend using the most up to date version of Google Chrome.
Other compatible web browsers are the most recent versions of Safari, Edge or Mozilla Firefox.

How do I request more login details for my colleagues?

Please speak to your client director for any new user requirements.

How do I fit the pages to my screen?

1. Press F11 to activate the full screen mode
2. Adjust the zoom level by using one of the following methods:
- Press the CTRL button on the keyboard and move the mouse wheel up or down to increase or decrease the zoom
- Click on the three-dot menu at the top right-hand corner of your browser and use the + & - icons under the zoom setting

The dashboard loads slowly – how can I improve performance?

Please try the following steps:
1. Where possible ensure you're using the Google Chrome browser
2. Don't have multiple tabs of the dashboard open at the same time
3. Close the dashboard, relaunch and log back in
4. Clear your browser cache

Is the system available at all times?

As the dashboard is a cloud-based solution, system updates normally take place in the background with no interruption to availability.

The 'data as of' date is not as recent as expected, why is this?

Data in MySI is normally refreshed in the middle of each week to present a 'data as of' date from the previous Sunday.

Dashboard navigation

Are there any user guides available?

You can access video guides on how to use each area of the dashboard from the MySi home page.

What do the navigation bar icons do?

Confirms dashboard service outages

MySI overview & FAQs link

Home button to take you back to the landing screen

Burger menu, click for more options & filters

How can the date range be changed?

Access the 'Burger' menu then use the slider bar to vary the start and end dates of information being presented (only relevant in certain data sections).

How do I print ?

On any page, you can use the keyboard short-cut command 'ctrl' + 'p' and this will open a print menu.
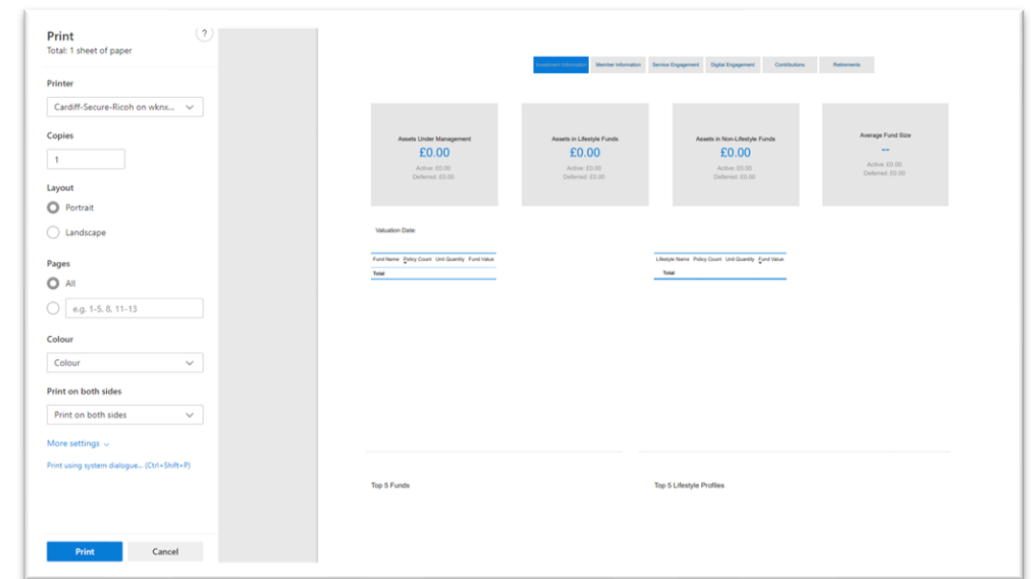
Dashboard functionality

How do I apply filters to the member information overview data?

Use the filter icon at the top right of the screen to open all the options for adding data filters.

How many decimal places does MySI use when displaying financial data?

We use two decimal places for all figures within MySI. Sometimes figures will not add up due to rounding.

Is it possible to filter information based on investment choice?

This data is not currently stored in the dashboard but may be added in the future.

How does MySI calculate the SLA data?

Data presented for the SLA dashboard is provided by the Legal & General DC Pension Operational team and aligns to existing governance reports. The default presentation of data is the most recent three months combined. Data is only updated monthly once the most recent full month's information is provided. Data periods can be changed via the date range filter.

Why may some graphs present gender as "unknown"?

The gender data has not been provided to Legal & General. This most frequently happens where people choose to opt out early in the onboarding process.

Why doesn't MySI provide detailed member-level information?

MySI is intended to provide useful information at pension scheme level and therefore utilises data to create aggregated views. If you require specific member data, you should liaise with your Legal & General client director.

Why is some information on MySI different to other reports provided by Legal & General?

Although MySI and other reports produced by Legal & General all use historical pension scheme data, some circumstances mean they may not always fully correlate. Many static reports often relate to a specific period whereas MySI is frequently refreshed and therefore more up to date.

How frequently is MySI data updated?

MySI receives weekly data refreshes normally completed by the middle of each week. Data presented is therefore up to the end of the previous full week. (Note – the one exception to this is SLA data which is updated monthly).

How do date range filters apply between dashboards?

Date range filters are only available in five of the nine dashboards, and some operate differently in certain dashboards to help maintain meaningful information presentation. Where a date range filter has been selected this will be maintained when navigating between the following dashboards:
• Member opt-outs
• Member activity
• Contributions

The Service Level Agreement dashboard always maintains an applied filter. The Retirements dashboard presents data against future dates and also acts independently of other date range filters.

What is the valuation date within the Assets Under Management dashboard?

The most recent valuation date available in MySI is used to present AUM information. Other valuation dates can be shown by first selecting a year, then a month and finally a specific valuation date.

In the Opt-out dashboard what do the two KPIs show?

These differentiate between new joiners to the scheme and new joiners who still have active opt out rights (within a set date range):

'Total enrolments in this date range' – the total number of new joiners to the scheme

'Total enrolments with opt out rights in this date range' – the total number of new joiners to the scheme plus previous new joiners from 30 days prior to the date range who still have active opt out rights.

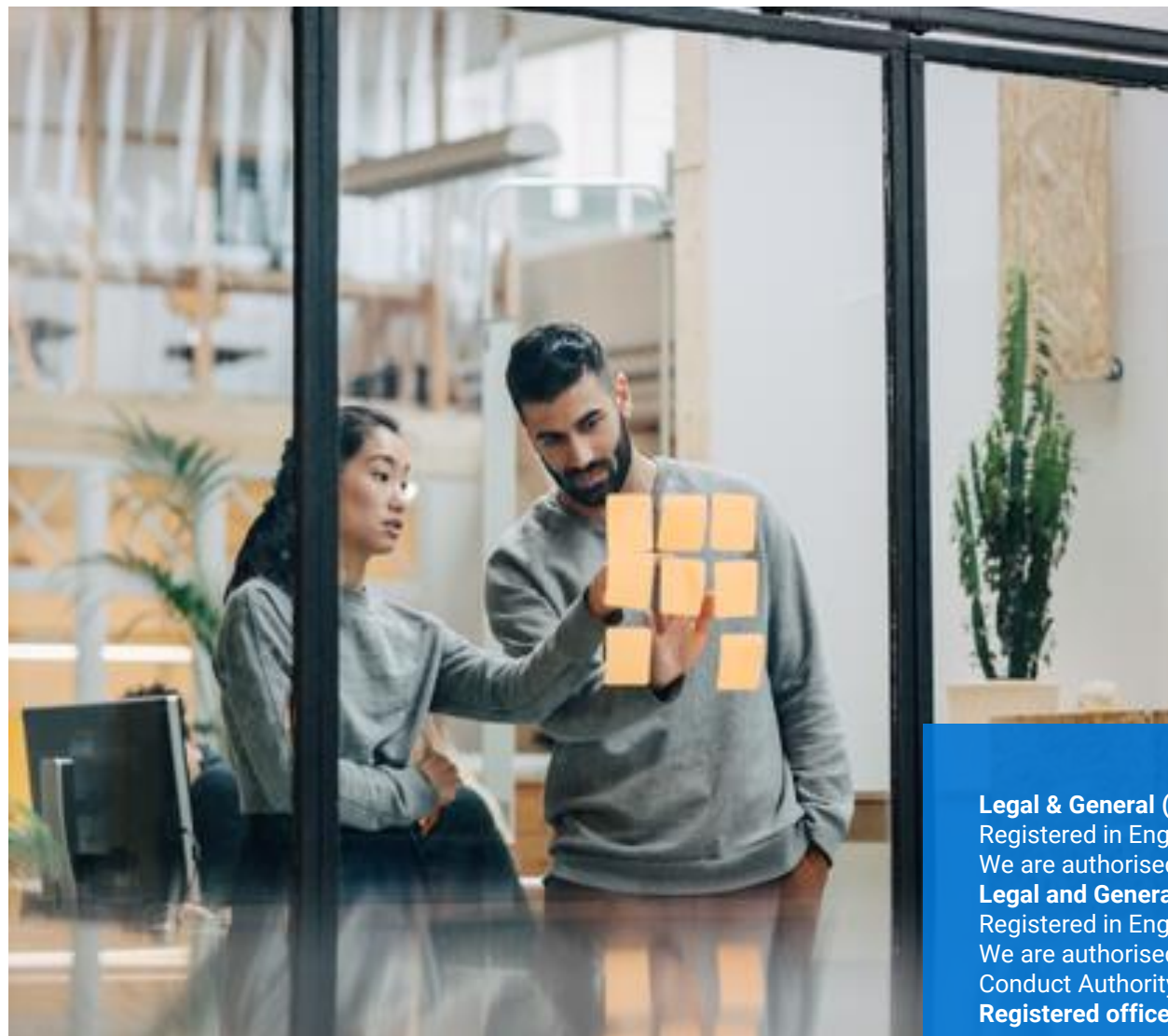## What are the three different categories of data types?

Within the 'opt out by channel' and 'gender graph', the following data categories are possible:
- Electronic file – member opt-out confirmed via an employer via regular file uploads to Legal & General
- Paper - member has confirmed opt-out election via a paper form
- Choice – member has confirmed opt out election via an online confirmation

Within the scheme category filter, can multiple categories be selected for combined data?

The scheme category filter currently only supports viewing categories individually. In the future Legal & General plans to produce a new feature which will allow filtering of multiple schemes.