

CSPS HOW TO: EGRESS

RB – May 2026 V4

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Document Version Information

Version 4 May 2026

Introduction to Egress

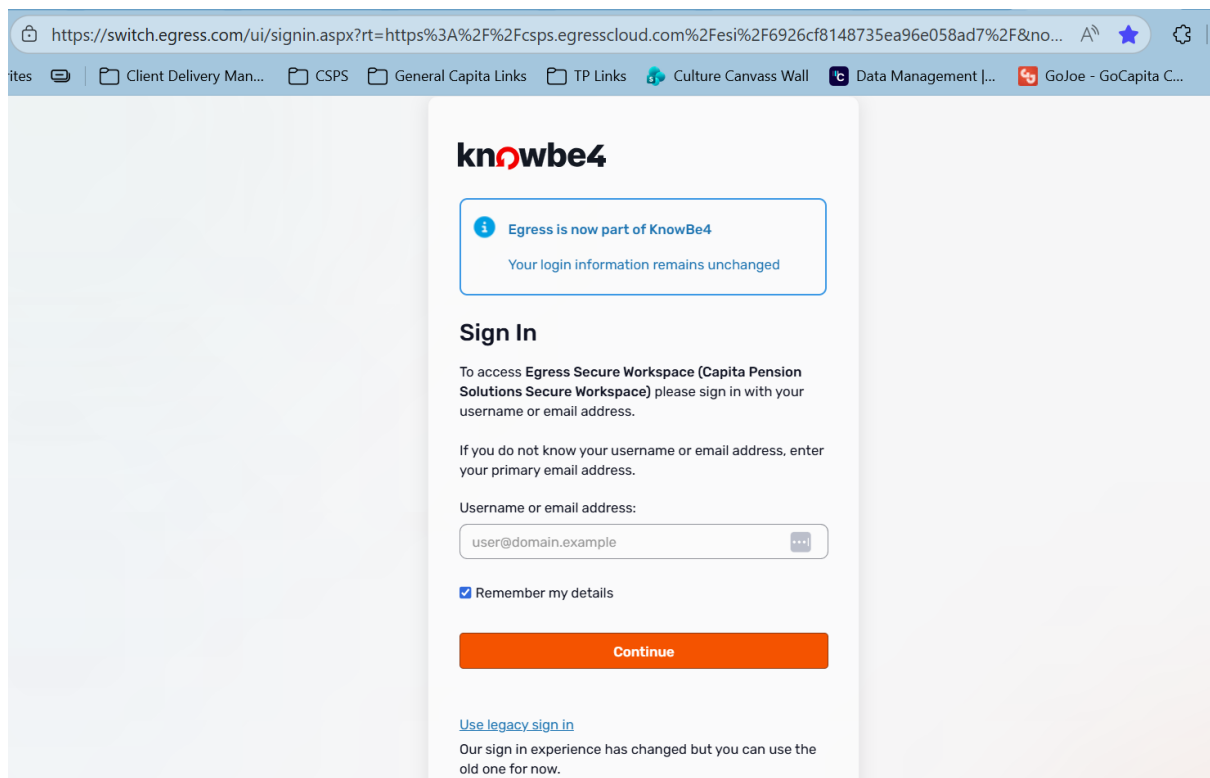
Egress Workspace (now referred to as Egress) is a secure online portal that our Employers use on a temporary basis to supply CSPA with their monthly interface submission and additional documentation for their members to allow CSPA to administer the scheme. This is a temporary way in which information is shared between CSPA and Employers and Payroll Providers.

Key Points to Note:

- Egress is a live system, and usernames and passwords are required for each named individual who requires access.
- Egress holds a variety of information that Employers & Payroll Providers share with CSPA, and this information contains member detail. Egress, therefore, should only be accessed by those who absolutely require access.

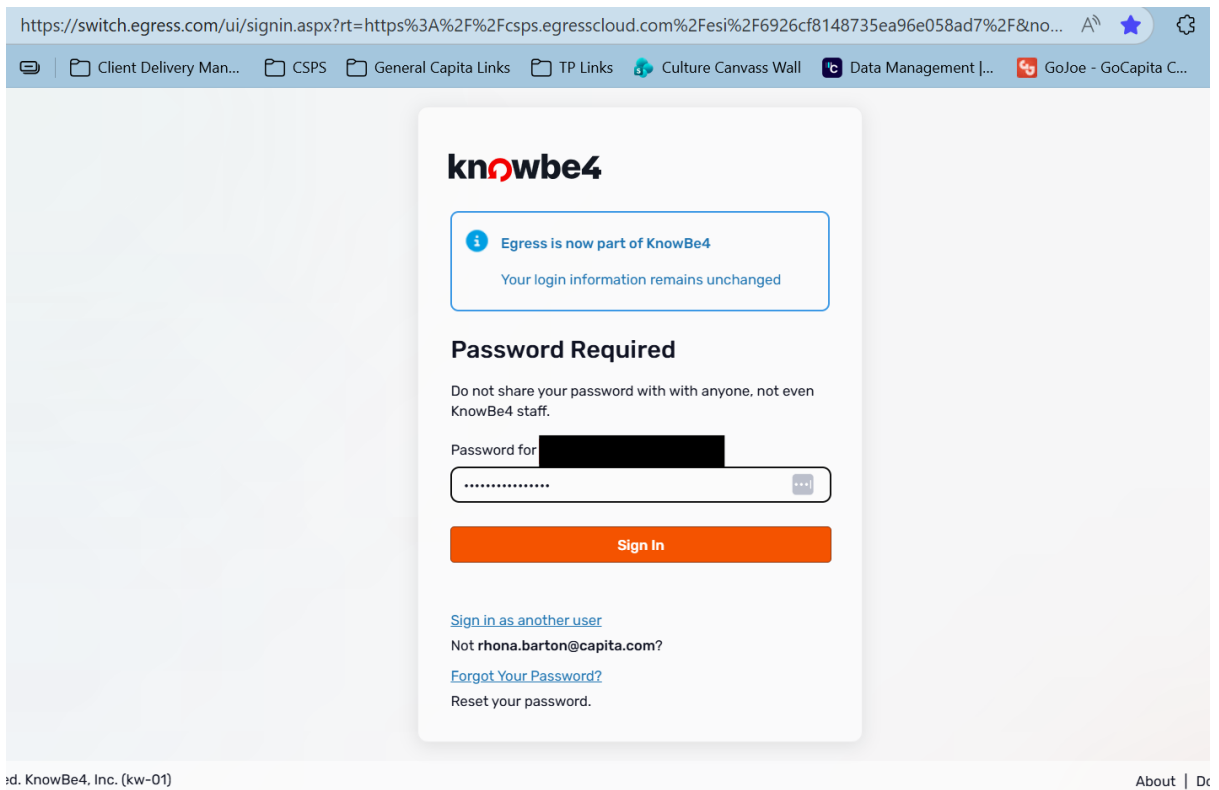
How to log in to Egress

1. CSPA issued Egress registration links to Employer, Payroll Provider/Shared Services in December 2025. These went to the Pension Lead that CSPA was given at that time. An email from “KnowBe4” was sent out with their registration link. This link should not be shared. The link does not expire.
2. To register for the CSPA Secure Egress workspace, click on the link in the email and follow the steps on screen to create a password.
3. Once registered, navigate to: <https://cspa.egresscloud.com>

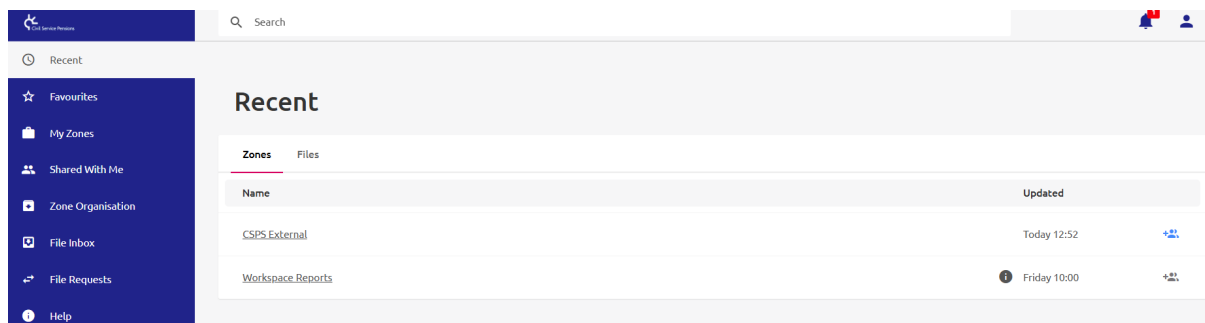


The screenshot shows a web browser window with the URL <https://switch.egress.com/ui/signin.aspx?rt=https%3A%2F%2Fcspa.egresscloud.com%2Fesi%2F6926cf8148735ea96e058ad7%2F&no...>. The browser's address bar and tabs are visible at the top. The main content area displays the KnowBe4 logo and a message: "Egress is now part of KnowBe4" with a sub-message "Your login information remains unchanged". Below this is a "Sign In" section. It instructs users to sign in with their username or email address to access the Egress Secure Workspace (Capita Pension Solutions Secure Workspace). It also provides a link for users who do not know their username or email address. A text input field contains "user@domain.example". There is a checked checkbox for "Remember my details" and a prominent orange "Continue" button. At the bottom, there is a link for "Use legacy sign in" and a note that the sign-in experience has changed but the old one can still be used.

4. Enter your email address and click on “continue” (you may wish to tick the “remember my details” box to save this email log in for future use).
5. On the next screen, enter the password that was created during registration and click “sign in”.



6. You will then be taken to the main page in Egress where you will see the full “CSPS External” folder.



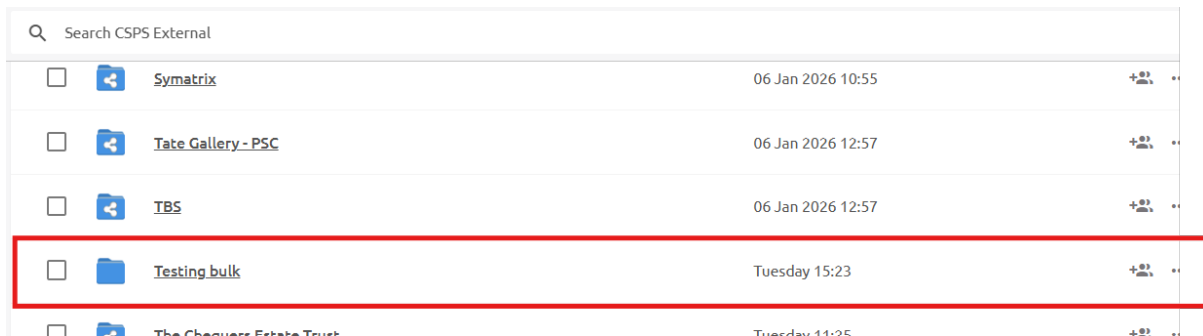
7. Click on “CSPS External” folder. You will be taken to your organisation’s specific folder(s).

Adding a User to Egress

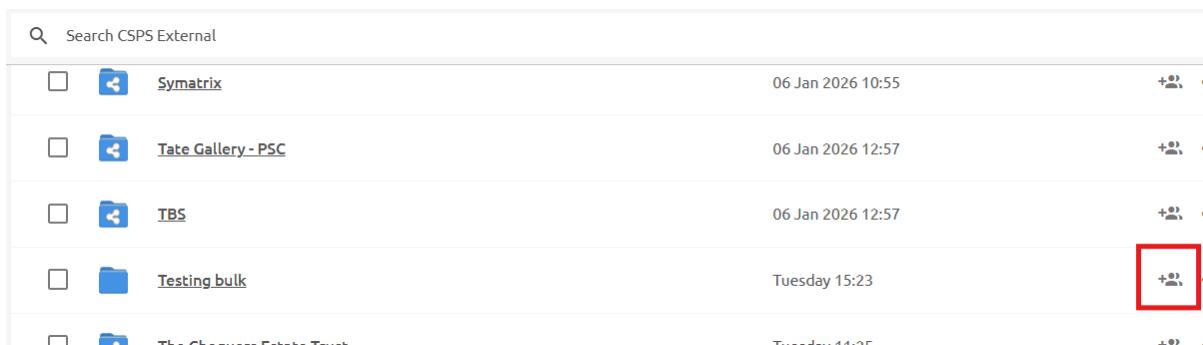
Your organisation's Administrator can add individuals within the organisation to Egress.

To add a user to a specific folder, for example "Testing Bulk" folder, the Administrator will:

1. Log in to Egress
2. Click into "CSPS External" to be taken to your folder(s) (Testing Bulk outlined in red below)



3. As you can see, the Testing Bulk folder currently has no "share" icon in it, unlike the 3 folders above, that have the white sharing icon included.
4. To share the Testing Bulk folder, click on the people icon at the right-hand side, as highlighted below:



5. This will open a pop-up window for the folder:

Testing bulk
User/Group Management

Who would you like to share this folder with?

Enter email address...

What permissions would you like them to have?

Guest User

Send invitation by e-mail?

Enter Message (optional)

Enter Message...

Existing Users

Search

↓

↓

↓

↓

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6. Enter the email address for the individual you are sharing the folder with – *you will need to click the address when it appears blue, in order for it to save to the address box.*
7. For the permissions/role, select “Administration” or “Guest User”. The small circle to the right of the role/permissions box will advise what each role can do.
8. Leave the tick box selected and move to the message box. Type a message to the individual you are sharing the folder with. The typical message may be:

“Hi

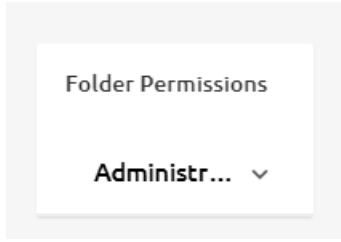
You have been added to our organisation's folder on the CSPA Egress Workspace.

Please note, CSPA does NOT have Egress Email. The Workspace is used for the upload/download of files only.

Best wishes

(Insert your name)”

9. Add your name to the bottom of the message.
10. Review what you’ve done and then click on “Share”.
11. When the page refreshes, the share icon will appear in the folder icon and, when you click into the folder, you will see that the “Folder Permissions” box (at right-hand side of window) now shows that there is an administrator and/or guest user added to the folder:



Uploading Files

Employers and Payroll Providers will upload files to Egress including but not limited to:

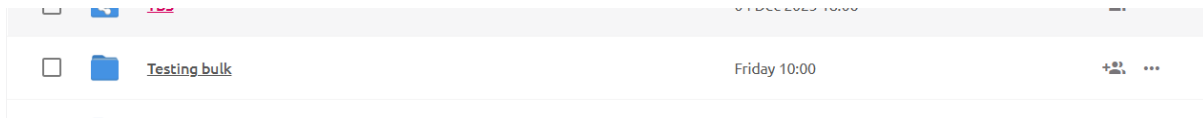
- Monthly Interface Files
- DVR/DVF
- RFS (Request for Services) including but not limited to:
 - i. Death in Service
 - ii. Dismissal
 - iii. Ill-Health Retirement
 - iv. Partial Retirement
 - v. Full Retirement
- DR1s
- CSP13
- EPPA
- Pension Change Forms
- Exits
- etc

Employers/Payroll Provider may add additional folders to their secure folder to help triage the work they are doing.

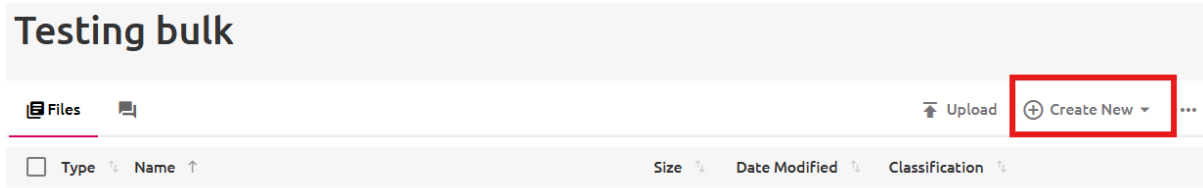
CSPS will also be uploading files to Egress so that Employers/Payroll Providers can take further action or provide additional information to us to allow us to process applications/information.

- These files will be uploaded to a folder entitled “From Capita to Employer” within the Employer’s secure folder although some employers/payroll provider will have created a folder with a name such as “Capita” or “Files loaded by Capita” etc.

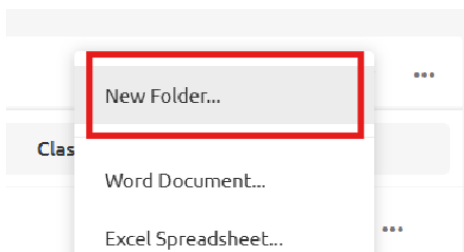
1. To upload a file once logged in to Egress, navigate to the relevant folder. (Testing Bulk in below example)



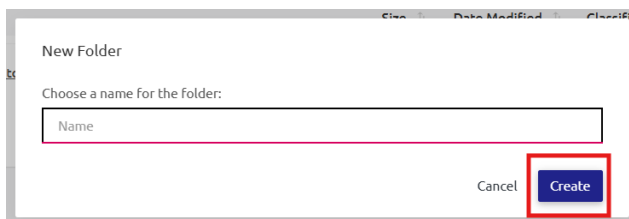
2. Click on “Create new”



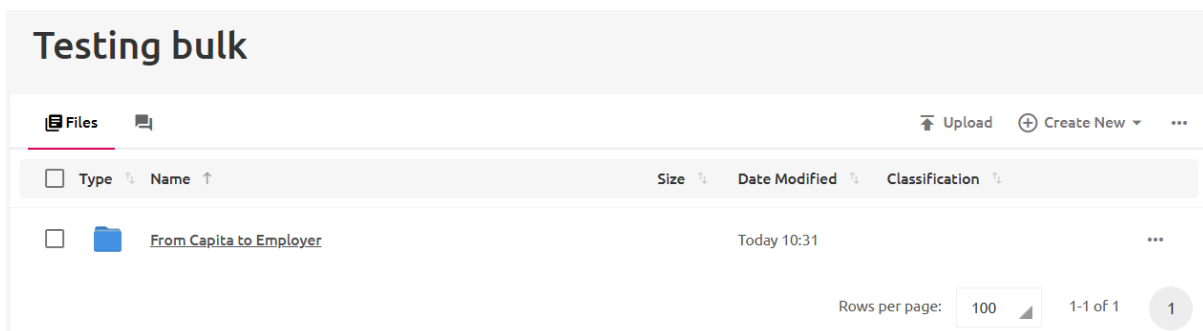
3. Select “New Folder”.



4. Name the folder e.g. “From Capita to Employer” and click on “create”.

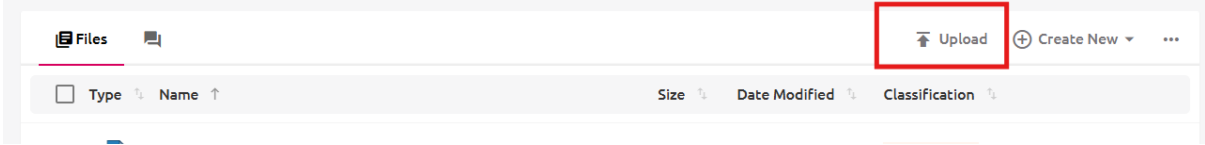


5. The new folder will appear.

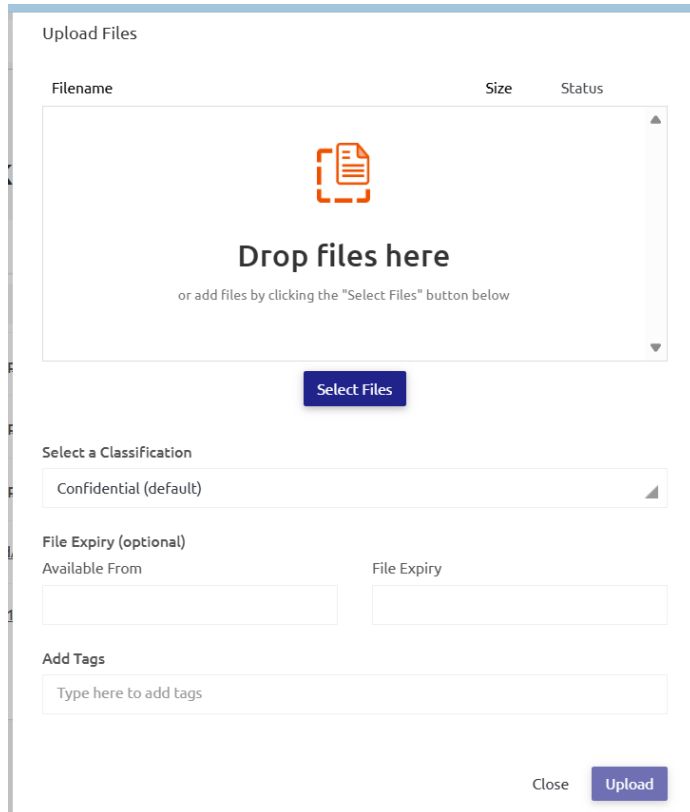


6. Click into the folder and select the “Upload” option at the right-hand side.

Testing bulk






7. A pop-up window will appear, and you can then select the file(s) to upload.

A screenshot of a "Upload Files" pop-up window. The window has a title bar "Upload Files" and a table header with columns "Filename", "Size", and "Status". The main area contains a large orange document icon with the text "Drop files here" and "or add files by clicking the 'Select Files' button below". Below this is a blue "Select Files" button. Underneath is a "Select a Classification" dropdown menu with "Confidential (default)" selected. Below that is a "File Expiry (optional)" section with two input fields: "Available From" and "File Expiry". At the bottom is an "Add Tags" section with a text input field containing "Type here to add tags". At the bottom right are "Close" and "Upload" buttons.

8. Click the "select files" button and search for the relevant file on your system and click "open".

Today

 Egress Secure Workspace Datasheet (2)	15/12/2025 12:15	Adobe Acrobat Document
 Egress Secure Workspace - Data Security ...	15/12/2025 12:15	Adobe Acrobat Document
 Egress - SSO and Open ID for Entra ID	15/12/2025 12:14	Adobe Acrobat Document

File name: Egress Secure Workspace - Data Security and Encryption

All files

Upload from mobile **Open** Cancel

9. The file will now show in the original upload window.

Upload Files

Filename	Size	Status
↕ Egress Secure Workspace - Data Security and E...	426 KB	0% ✕ ▲

Select Files

426 KB 0%

Select a Classification

Confidential (default)

File Expiry (optional)

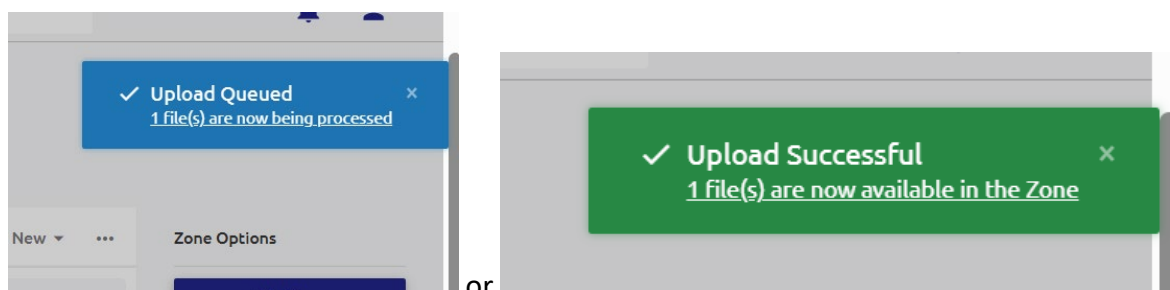
Available From File Expiry

Add Tags

Type here to add tags

Close

10. Click "Upload". Egress will then show either a blue banner saying the file is queued for upload or a green banner saying the file has been uploaded successfully.



11. Now click “close” on the file upload window to return to the folder you have been working in.

PLEASE NOTE:

- Although a notification should be sent to the employer/payroll provider each time a document is uploaded to their folder to prompt them to access Egress/the document, it is also worth regularly checking Egress for added files.

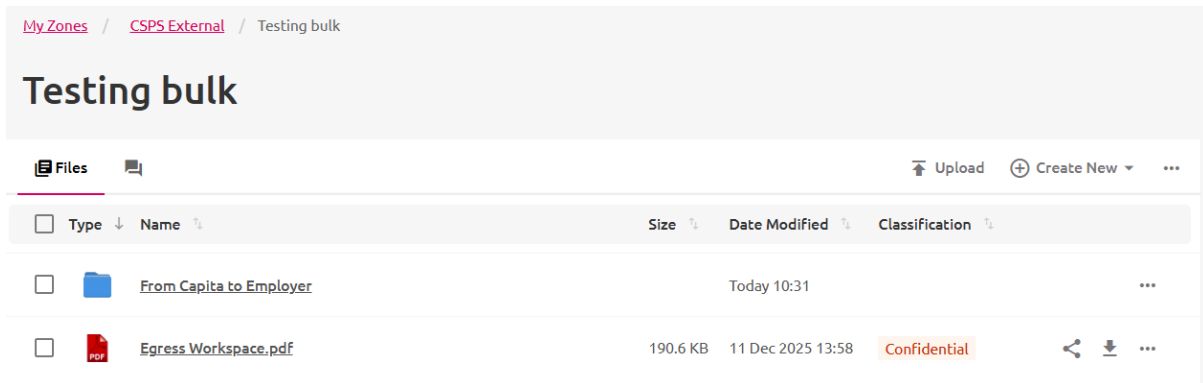
Downloading Files

Employers/Payroll Provider and CSPS will be required to download files from Egress including but not limited to:

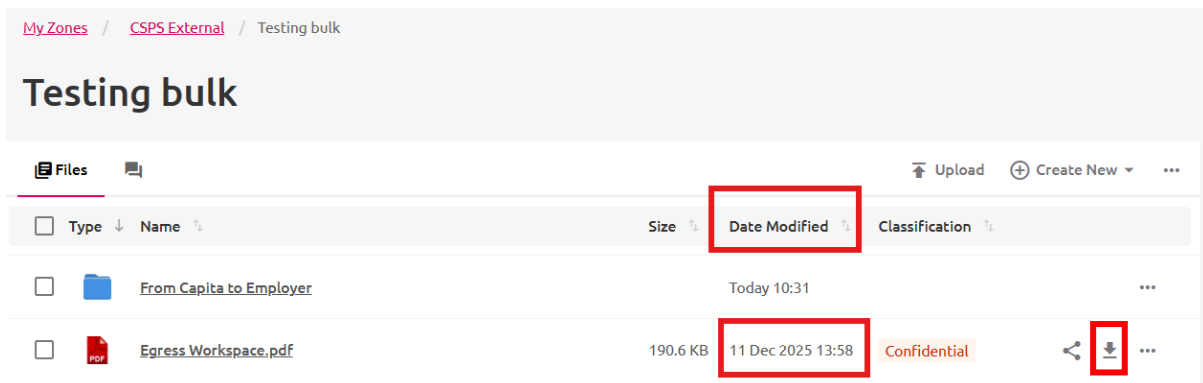
- DVF/DVR
- Monthly Interface Files
- RFS (Request for Services) including but not limited to:
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- EPPA
- Pension Change Forms
- Exits
- etc

CSPS will also be downloading files from Egress to process these within their systems which, in turn, will allow them to process applications/information. Files are automatically removed from Egress after 14 days and anything that has not been downloaded will need to be re-uploaded.

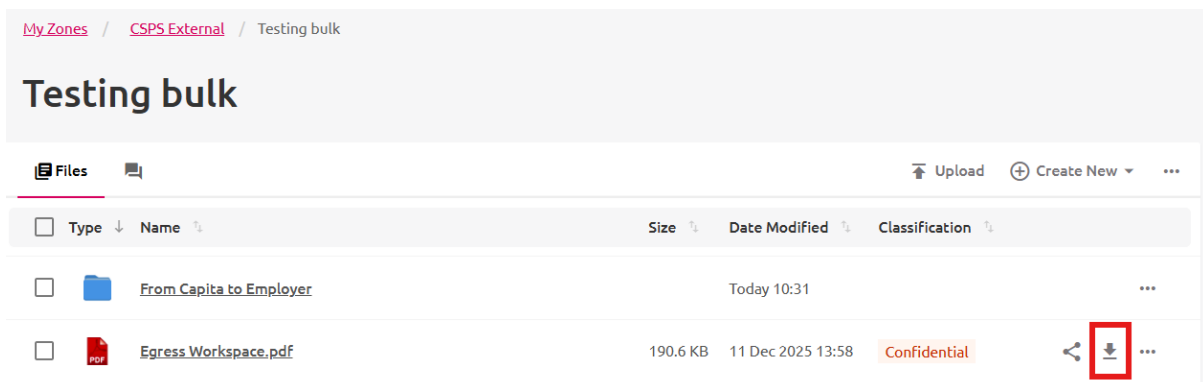
1. To download a file once logged in to Egress, navigate to the relevant folder and click on it to open. (In this example, the Testing Bulk folder has been opened, and 1 file can be viewed along with 1 folder)

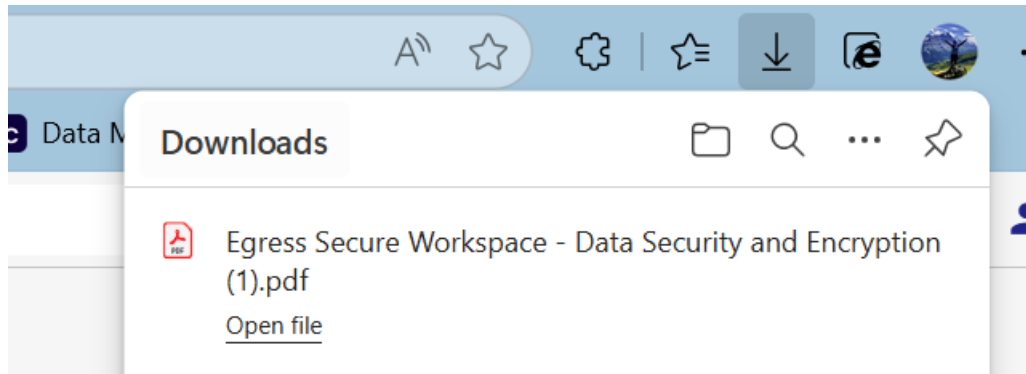


2. Find the file that is required to be downloaded. (Egress Workspace.pdf) and look for the downward facing arrow at the right-hand side (outlined in red below).
 - a. You can check the date and time the file was last modified by reviewing the “Date Modified” column. This will let you know if the file needs actioned immediately (i.e. the 14-day retention period is approaching) – 11 Dec 2025 at 13:58 in this example.



3. Click on the downward facing arrow to start the download. This will pull the download into your downloads folder, and you can now move the file to the relevant folder or storage area on your system.





4. Egress has a retention policy of 14 days from the date the document was uploaded to the folder, however, once a file is downloaded from Egress, the file should be deleted from Egress.

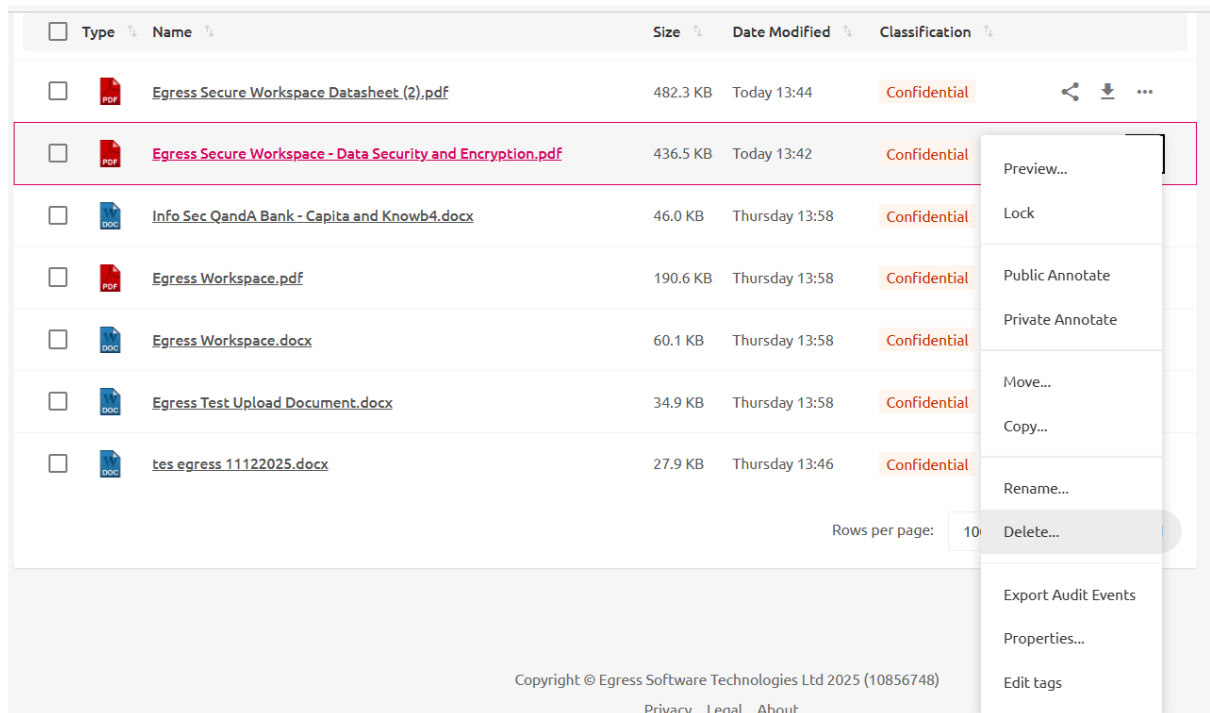
PLEASE NOTE:

- Although a notification should be sent to the employer/payroll provider each time a document is uploaded to their folder to prompt them to access Egress/the document, it is also worth regularly checking Egress for added files.

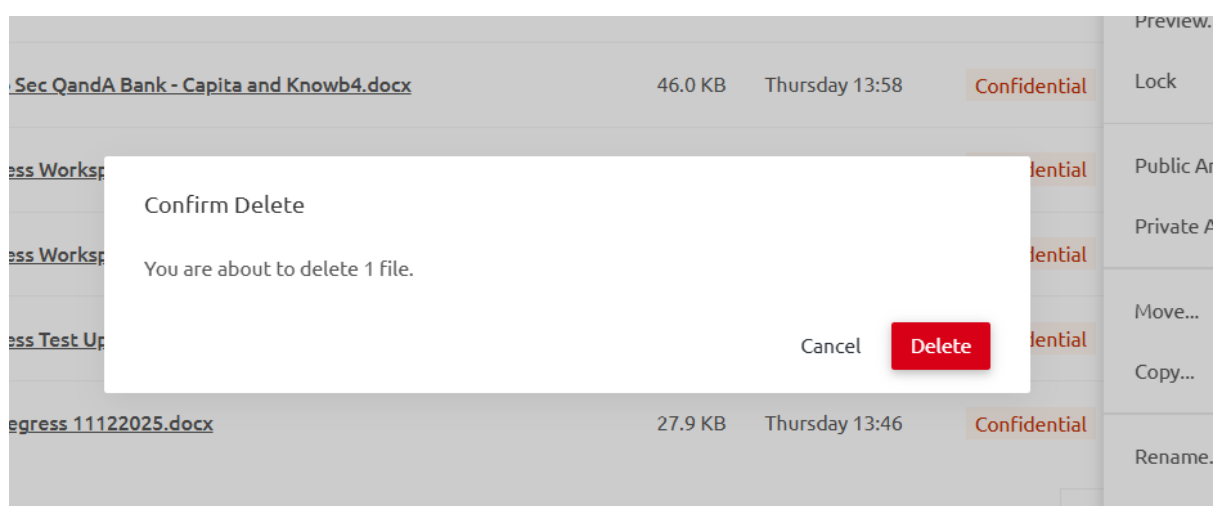
Deleting Files

Egress has a retention policy of 14 days from the date the document was uploaded to the folder, however, once a file is downloaded from Egress, the file should be deleted.

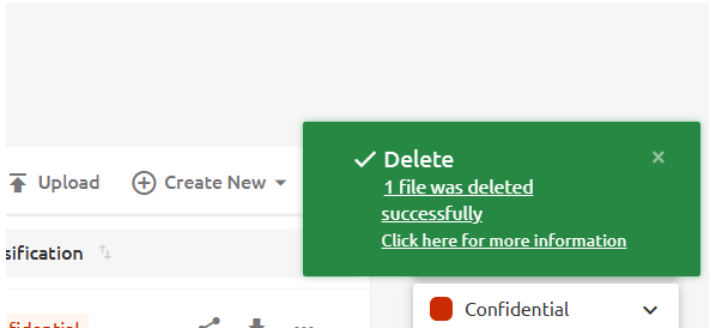
1. Once a file has been downloaded for action, the file should be deleted from Egress by clicking on the 3 dots to the right of the file and selecting “delete” from the menu options.



2. A pop-up window will appear asking you to confirm deletion.



3. Select “delete”. The file will now be deleted from within the folder.
4. You will receive a green banner telling you that the file has been deleted successfully.



This is the end of the Egress work instructions