



Restoring Access and Accuracy: A NEST Pension Account Case Study

Highlights

- 1 Regained access to locked **NEST pension** account
- 2 Corrected **nine months of pension** contribution errors
- 3 Overcame **third-party access barriers** with strategic coordination
- 4 Ensured **long-term compliance** and control for the client

Introduction

Handling **payroll transitions** in sensitive situations demands a balance of precision and empathy. When access to a **NEST pension account** was lost following the account holder's passing, the client turned to **Corient** for support in regaining control and correcting **previously misfiled contributions**.



The Initial Problem: What Went Wrong?

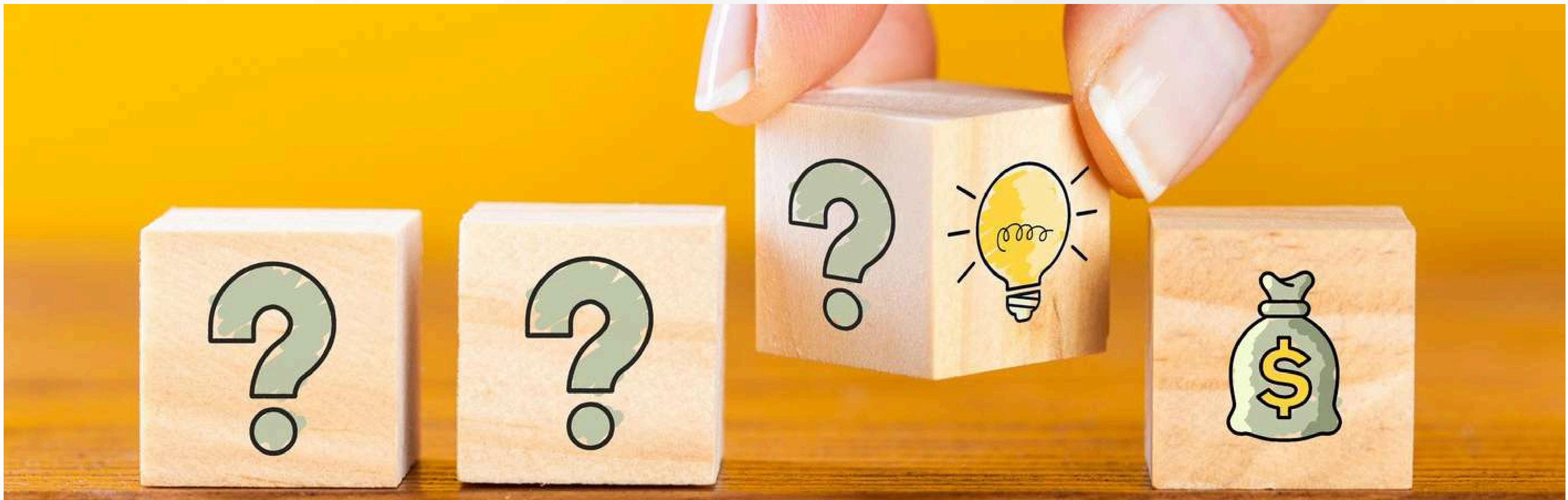
The pension account was initially registered under a family member who had passed away. As a result, the client was locked out of the account and **could not manage or correct contributions** made between **July 2023 and March 2024**. Despite eventually regaining access, the contributions submitted during this period were **inaccurate**, requiring immediate intervention.

Corient's First Solution: The Fix

Corient, experienced in payroll outsourcing, took the first steps by:

- **Contact NEST** support to outline the situation and request next steps.
- I advised the client to **contact NEST directly**, providing her relative's personal information and proof of relationship, to verify access rights.

While this initiated progress, new challenges emerged that halted full resolution.



The New Problem: A Surprise Roadblock

Corient could not make account changes due to a **lack of delegate access**, and NEST support would not release information without direct client verification. This **verification barrier** slowed the correction process, creating another layer of complexity.

Corient's Second Solution: Fixing the New Problem

To navigate these barriers, Corient implemented a **structured plan**:

Step 1 – Acknowledgement as Third-Party Support

Corient requested that NEST **log the issue on the client's account**, officially recognising our involvement.

Step 2 – Guided Verification

We coached the client on exactly what NEST needed: **personal details**, identification, and **proof of relationship**.

Step 3 – Client Follow-Through

The client contacted NEST, **completed verification**, and successfully regained account access.

Step 4 – Credential Sharing for Action

With access restored, the client provided Corient with **secure credentials** for account management.

Step 5 – Pension Record Correction

Corient updated and corrected the **erroneous contributions** from July 2023 to March 2024, restoring full compliance.

Dedicated **payroll services** and constant client coordination made this multi-step resolution possible.

OUTCOME



The Final Outcome: A Success Story

The outcome was both professional and personal:

- **Full access restored** to the NEST pension account
- **All historical errors corrected** with up-to-date records
- **Confidence restored** in the accuracy and control of future contributions

What the Client Said



"Thanks to Corient, a difficult situation became manageable. Their clarity, structure, and patience helped me confidently resolve a complex pension issue."

Key Takeaways: Why This Matters for Businesses

- Account access issues require both **technical and human support**
- Proper **documentation processes** are vital in sensitive transitions
- **Outsourced payroll services** can ensure continuity even in personal crises

Even the most complex payroll problems can be resolved when trust meets expertise.