

Portal Registration Guide



Your guide to the Member Online Portal

We want to make managing your pension quick, easy and secure, allowing you to manage your journey to retirement online.

This is your guide to accessing the Member Online Portal. It's easy to access, safe and secure, and available for everyone.

Follow the step-by-step instructions to register and you'll have access to your pension at any time.

We're continually developing the Portal and adding new functionality too, so keep an eye out for new features being added.



Registration

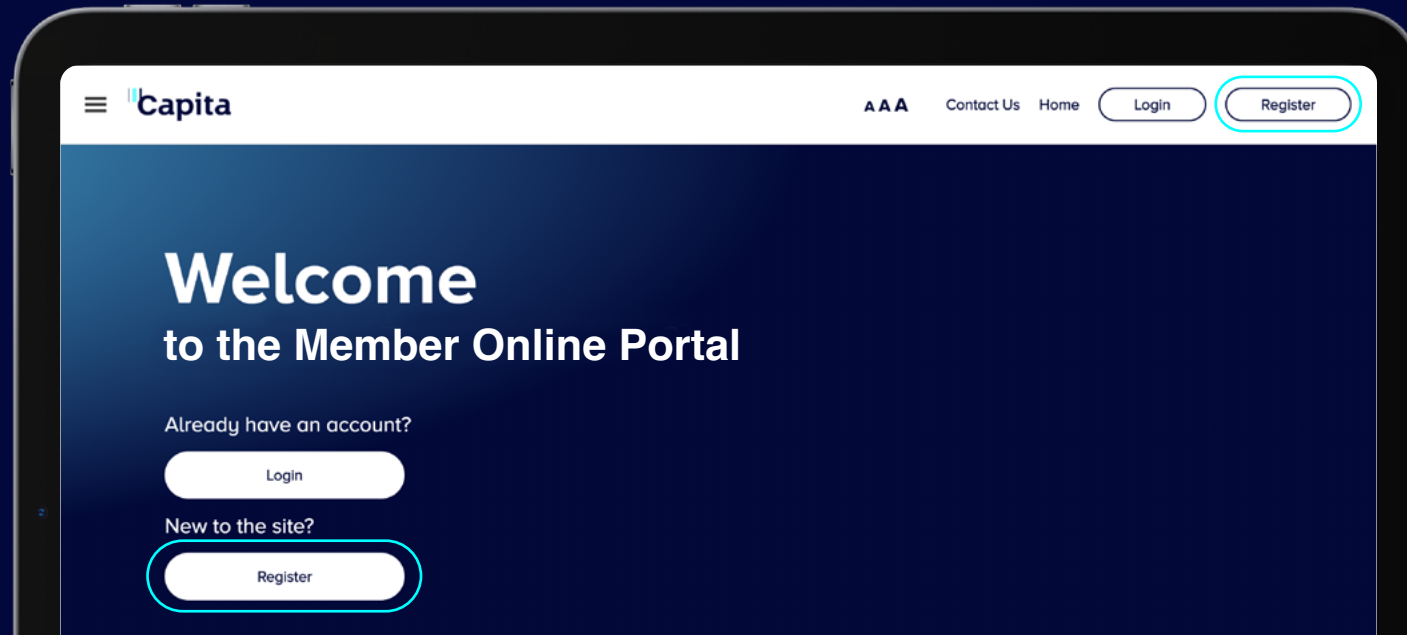
The registration process is quick and easy, you just need to fill out some key personal information which we'll validate against your pension scheme record to make sure your personal details are kept safe.

Before you get started you'll need the following information to hand:

- Email address
- Mobile phone number
- National Insurance number

1 To begin the registration process, on the home screen click on either the 'Register' button in the top right-hand corner or on the 'Register' button under the 'Welcome' text.

We've highlighted them below for you:



2 The first step is to set up your login details which you'll use every time you log in to the site going forward. **Please also have your National Insurance number to hand when registering.**

Your login name and password must adhere to the rules set out below:

Login name

- Must be a minimum of six characters (letters or numbers) with a maximum of 40
- This can't be your email address

Password

- Must be 8 or more characters long
- Must contain number(s)
- Must contain lower case letter(s)
- Must contain an upper-case letter OR punctuation character
- It's strongly advised you do not enter a password that you have previously used

We also ask that you provide a security question and answer. This can be anything you like, just make sure it's something you'll remember when you come to log in.

9:41 AM Tue Sep 15 100%

Login Details

The login name you choose must

- > Be a minimum of six characters (letters or numbers) with a maximum of 40

Login Name *

The password you choose must meet all of the following:

- > Be 8 or more characters long
- > Must contain number(s)
- > Must contain lower case letter(s)
- > Must contain an upper case letter OR punctuation character
- > It is strongly advised you do not enter a password that you have previously used

Password *

Confirm Password *

Security Question *

Security Answer *

3 Once you've entered login details, you'll need to add your contact information, so we can send you important information about your pension as well as any password or PIN resets you may need.

We'll need to send you a PIN number as part of your registration, and you can choose from the dropdown how you want to receive this.

You can also choose how you want the Scheme to send communications to you, as well as how you get notified of any notifications in your mailbox.

The screenshot shows a mobile application interface for entering contact details. The screen is titled "Contact Details" and has a status bar at the top showing "9:41 AM Tue Sep 15" and "100%" battery. The form contains the following fields:

- Your Email Address ***: A text input field containing the placeholder "e.g. john@capita.com".
- Confirm Email Address ***: A text input field containing the placeholder "Repeat the email".
- Mobile Telephone Number ?**: A field with a country code dropdown menu set to "(UK) +44" and a numeric input field containing "00000000000".
- I wish to receive my PIN via ***: A dropdown menu with "Email" selected. This label and dropdown are circled in red in the original image.
- Contact Preference ?**: A dropdown menu with "Digital" selected.
- Digital Notification Preference ?**: A dropdown menu with "Email" selected.

- 4** To help keep your account safe and secure, and to make it easier for you to log in, you can set up multi-factor authentication on your account. This means generating a unique code that is sent as a text message to your phone or comes from an app each time you log in. To set up multi-factor authentication, select from the dropdown how you want to receive your code. Details of how each of these work are detailed below.

Code sent by SMS

If you choose to receive your code via SMS, you don't need to do anything else as part of the registration.

Once you've completed registration and are ready to log in to your account, make sure your phone is nearby as after you've entered your login name and password you'll need to confirm the last 3 digits of your phone number so we can send you a text message with your unique code.

You will then need to enter this code to access your account.

Code sent using an app

If you choose to receive your code via an app, you will need to complete the following steps:

1. If you don't already have an Authenticator App, then download one from the app store on your device (such as Google Authenticator).
2. Open the Authenticator App.
3. You'll need to follow the set up instructions for the Authenticator App you download.
4. If you're prompted for a refresh period on the app you're using, set this for 30 seconds. If you're prompted to set a code length, then make this 6 digits.
5. Once the app is set up, next time you log in to your account you'll be able to use it to generate a code as part of the login process.

OR

If you don't want to use multi-factor authentication leave the dropdown as 'None'. This means each time you log in you will require your username, password and PIN.

- 5** We also need you to fill out some personal details before we can register you for the Portal. By giving us your National Insurance number, surname, gender and date of birth, we can validate your pension account and make sure you are set up to access all the right information.

To fill out your date of birth, you can either type straight into the box or click on the icon highlighted below to select your date from the drop-down calendar.


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Personal Details

National Insurance Number * QQ123456A

Surname * Smith

Gender * Male

Date of Birth * DD/MM/YYYY 

Please enter a valid date of birth

Jan 2023

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1	2	3	4	5	6	7

6 To complete your registration, you'll be asked to enter a security code by confirming the letters shown on screen. You can use the buttons highlighted below if you would like to hear the letters read out before you enter your text in the box.

Finally, make sure you read the Terms and Conditions linked at the bottom of the page and tick the box to say you have done so.

Once you've registered, you're all set to log in to your online pension account. You can view our booklet which will guide you through the log in process, as well as explaining what you need to do to update personal details, Expression of Wish information and guiding you around your member mailbox.

