# Your Step-By-Step Registration Guide to the Retirement Scheme Administration Web

This guide is specifically designed for Retirement Scheme Administration services. Should you wish to register for other services, please consult the other online guides that cater for those.

There are two steps to getting started. It is important for you to complete both steps.

Step 1: Register for Old Mutual's Online Services

Step 2: Apply for access to the applicable Retirement Scheme Administration service

#### You will need the following

- 1. Your Identity Number (this could be a RSA ID, a non-RSA ID, a Passport Number, a Social Security Number or a British National Insurance Number)
- 2. Your client number. This is the number assigned to you by Old Mutual either via e-mail or the post.

### **Contact us**

If you need assistance at any point during the process, simply contact the relevant Support Centre:

#### For assistance with step 1

Within South Africa: 0860 60 65 00 Outside South Africa: +27 21 503 1710 E-mail: help-secure@oldmutual.com

### For assistance with step 2

Within South Africa: 0860 466 466 Outside South Africa: +27 21 504 2970 E-mail: pss@oldmutual.com

Queries will be attended to between 08h00 and 17h00 (SAST).

### **Step 1: Registration**

# If you have already registered for one of Old Mutual's online services and have a user number, proceed to step 2.



2. You will arrive at the Old Mutual Secure Services page. Click on **Register for a service**.

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### 3. Supply your personal details

The mandatory fields must be completed, although we encourage you to complete all the fields.

Read and accept the <u>Legal</u> <u>Terms and Conditions</u>

Note: Access to MyPortfolio This provides you with access to other investments you may hold with Old Mutual. Please **do not** tick the box to register for these services at this stage.

Login	Register	Terms & Conditions	Help	Contact Us
SECURE SE	RVICES   REGI	STER		
PERSONAL DET	AILS			
Please note that fie	elds marked with a "*" are	required.		
	Title:*	lone 💌		
	Initial(s):*			
	Name(s):*			
	Surname:*			
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ACCESS TO MYP	ORTFOLIO			
MyPortfolio gives y	ou access to detailed and u	up-to-date information on a	ll your Old Mutual policie	s and investments v
the internet.				
灯 I would like to	register to view my <u>Old Mu</u>	tual portfolio		

# 4. Select a password and answer security questions

You have the option to choose your own username or make use of the system generated usernumber. Your username needs to be unique. You can verify it by clicking on the "check availability" link.

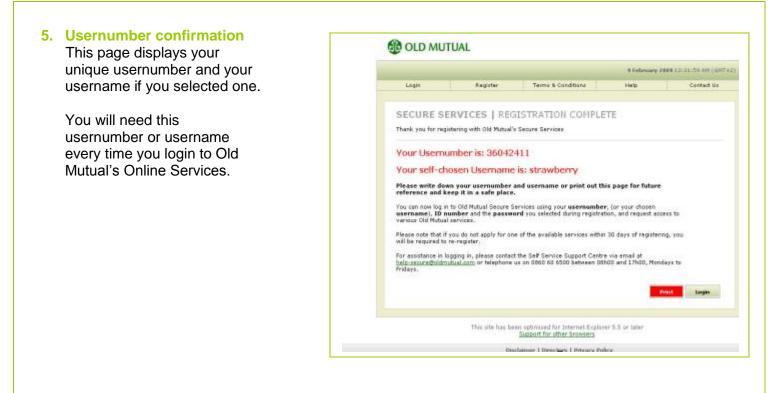
**Note** the password is case-sensitive.

			9 February 20	0912:28:49 AM (GMT+2)
Login	Register	Terms & Conditions	Help	Contact Us
SECURE SE	RVICES   REG	ISTER		
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do great things

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 You have now successfully completed step 1. To proceed, click on Login. Alternatively, go to <u>https://secure.ssa.oldmutual.co.za/login/login.asp</u>

### Step 2: Apply for access to a specific service

1. Log in Enter your	🚯 OLD MUTUAL
usernumber or username, ID number	LOGIN 9 February 2009 11:34:24 AM (GMT+2)
and the password you chose during	Usernumber or <u>username:</u> ID number: Password: Forgotten your password?
registration. Click on Login to continue.	NB: Your password is CaSe SeNsItivE.
	Or register for Old Mutual Secure Services Register
	Terms and Conditions   Privacy Policy   Disclaimer   Directors



### 2. Select a service On the home page, under the heading 'Apply for a service', (a) select Client Services (b) then select Retirement Scheme Administration APPLY FOR A SERVICE Please select your role. View all roles CLIENT SERVICES MyPortfolio MyPortfolio enables you to view your own consolidated Old Mutual portfolio online. 🕀 Evergreen / Easy Benefit Plan 🕀 Fairbairn Capital 🕘 Healthcare Member Member online enquiries. Access your personal medical scheme information, savings account balances, claims processed and claims paid. Retirement Scheme Administration → Retirement Scheme Administration Members can access retirement scheme information online. <u>Retirement Scheme Administration (Transact access)</u> Members and company administrators can access retirement scheme information and transact online. <u>EB-Data I: Payroll Servicer</u> Choose this role if you are an Employer using the DATA-/ system to update your scheme membership on a monthly basis. <u>EB-Data I: Enquiry Viewer</u> Choose this role if you only wish to view data for a specific Billing Group.

(c) from the drop-down list, select as follows:

- **Retirement Scheme Administration**: Select this service if you will be submitting claim documentation via the eClaims Web application system.
- Retirement Scheme Administration (Transact access): Select this service if you will be:
  - submitting Payroll files
  - authorising payroll data
  - viewing scheme and member data via the 3rd Party Web

Issue date: March 2012



### 3. Delivery details

Your details will need to be verified as part of the process.

Select the appropriate option and supply the required information.

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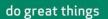
## 4. Service specific details

Enter your **client number** on this screen, as provided to you, either via post or e-mail.

Click on **continue** to complete the process.

		Help	Change Details	Apply for a Service	Home
		SERVICE	APPLY FOR A	RE SERVICES	SECUI
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Remember this is **not your 8-digit usernumber** and will **not** be accepted if you use it here.



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### 5. Activation of your service

Your application is now complete.

If you have applied for Retirement Scheme Administration and your application is successful, you will receive an email within 24 hours confirming that

	Apply for a Service	Change Details	Help	Terms & Conditions	Contact
CECU					
SECU	RE SERVICES	APPLICATION	COMPLETE		
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we are	email coi				
we are		ecure Services Home Pa			

access to the service has been granted.

If you have applied for Retirement Scheme Administration (Transact access), we will need to verify your details as part of ensuring your online security. You will receive a visit from a courier service within 5 days. They will ask to see your Identity Document. Once you have been successfully verified, you will be sent an e-mail confirming that access to the service has been granted.

#### 6. Applying for more than one service

If you need to apply for another service, go back to the Secure Services Home Page and follow the registration process from point 2 under step 2 (Select a service).

