PENSIONS MEMBER PORTAL

User Guide.

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Introduction

What to expect

Welcome to the pension member portal area! Now our customers and trustees can get self-service via this portal, which can be accessed at any time anywhere using your computer or phone browser.

– A member now has visibility to his/her account details and can request update of any detail easily via the platform.

– You can view all Contributions right from your initial transaction (All contributions/transactions history).

– A member has access to his/her detailed statement at any moment, which you can also download as a pdf for your storage or printing.
We have also embedded an online calculator, which you can use to determine /simulate benefits projection based on the input data estimates.

For trustees, they can view and download the general members' statement from the platform.

How to access

Using any browser of your choice i.e Google chrome, Mozilla Firefox, Microsoft Edge, Safari and others, you can access the portal from
https://pensionsug.jubileeinsurance.com/
And you will land on a page similar to the one shown below in *figure 1*.

➢ Click on the "Proceed to login" button to continue.

➢ Alternatively, if you are a member, you can directly access the login/registration page using the link
https://pensionsug.jubileeinsurance.com/member/login

➢ For a trustee, you can also directly access the login/registration page using the link https://pensionsug.jubileeinsurance.com/member/login

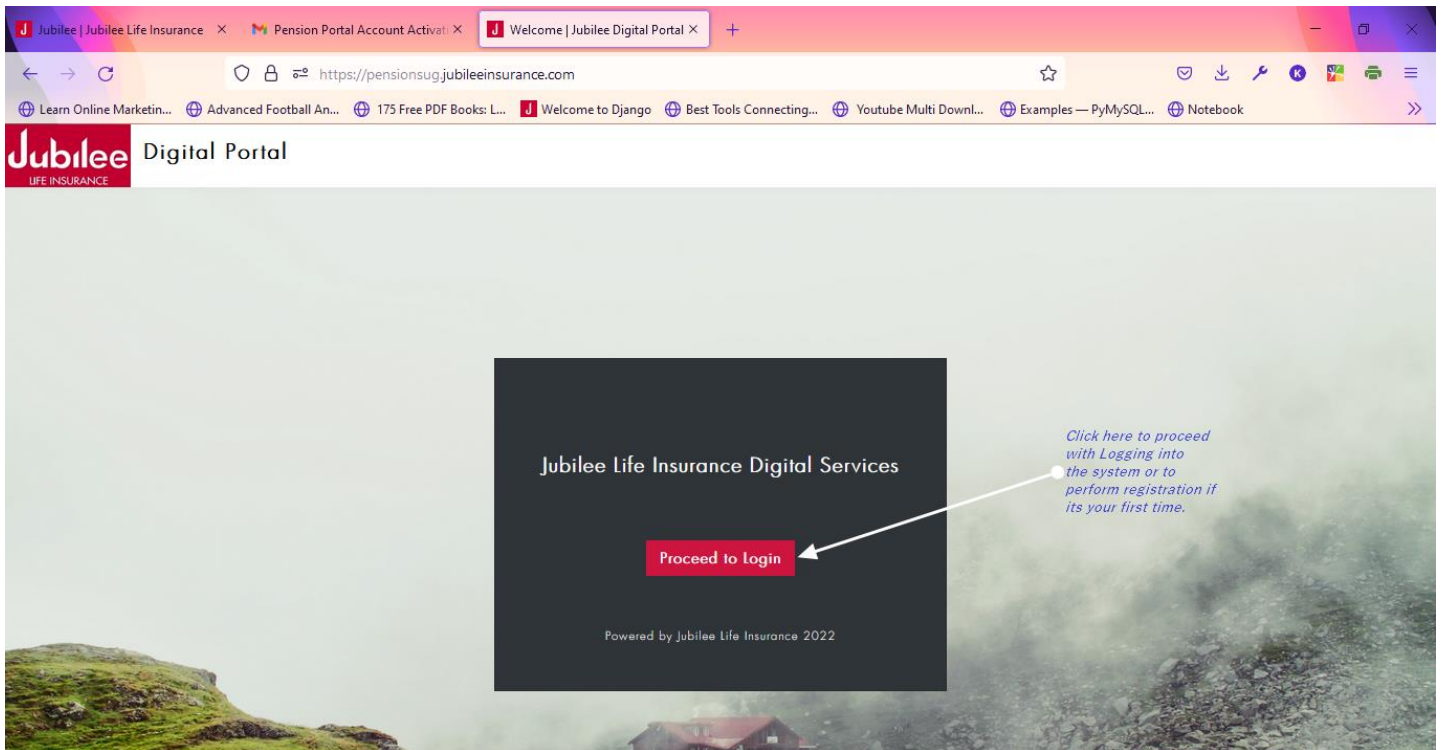*Figure 1 Landing Page*

REGISTRATION

On clicking "Proceed to login", a second screen shown below *figure 2* will be loaded.

➢ Click Member login if you are a member else click Trustee/Contact Person login if you are a trustee.

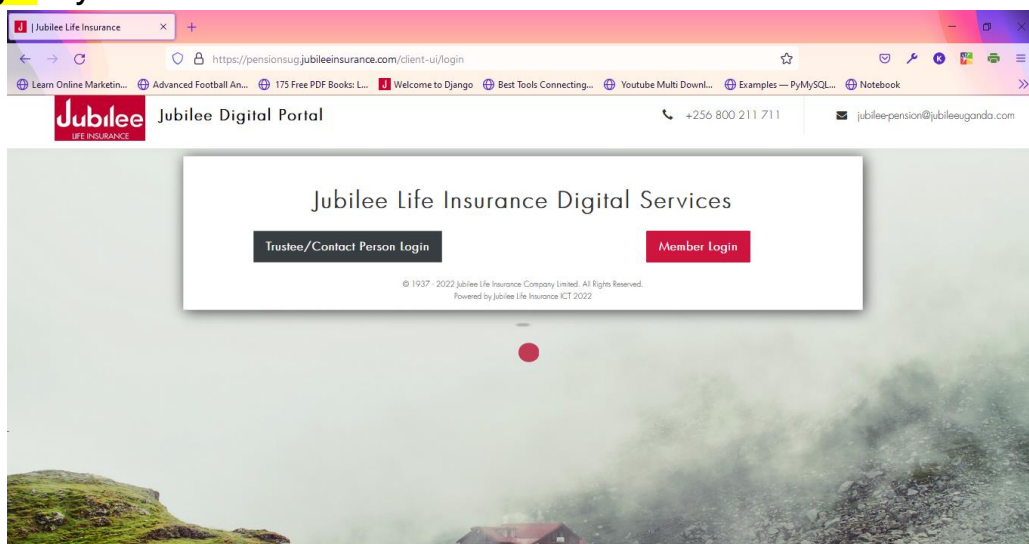*Figure 2*

Note: *Going forward, this guide is majorly considering platform access by member rather than a trustee.*

➢ When a user clicks "<mark>Member login</mark>", he/she will be taken to the main client page shown below. This page can also be directly accessed by using the link https://pensionsug.jubileeinsurance.com/member/login .
From here, the client can always log in or perform registration if it is the first time accessing the system.

Figure 3 Register-Login

➢ To register, Click on "<mark>Register Now</mark>", you will be taken to the registration page shown below *figure 4.*
➢ You are required to enter the *Company/Scheme Code*, which was shared with you and your *National ID Number (NIN)* or Passport Number, which was used when you enrolled.(*Can contact us if you don't have these details.*)

Figure 4 Registration

➢ After entering the company code and National ID number, Click "Register Now"
➢ If all records entered well, you will be redirected to a screen below and an email will be sent to the email address you used when enrolling, it's the email shown on the screen message where you will proceed for activation

Figure 5 Successful registration

- ➤ Else, if the company code and national Id number combination entered are not recognized as existing client records, you will be redirected to the screen below *figure 6.*

Figure 6 Failed Self-Registration

- ➤ Please Contact us if such a case happens to avail you with the correct registration details before you can proceed.
- ➤ However, if a successful registration message is shown with message that an activation mail has been sent to your email as it was shown in *figure 5*, proceed and check your email inbox for an email with subject "Pension Portal Account Activation" from noreply@jubileeinsurance.com as shown below figure 7. Open it and Click "Click here to activate" button, which will redirect you, back to the platform to complete with your account activation.
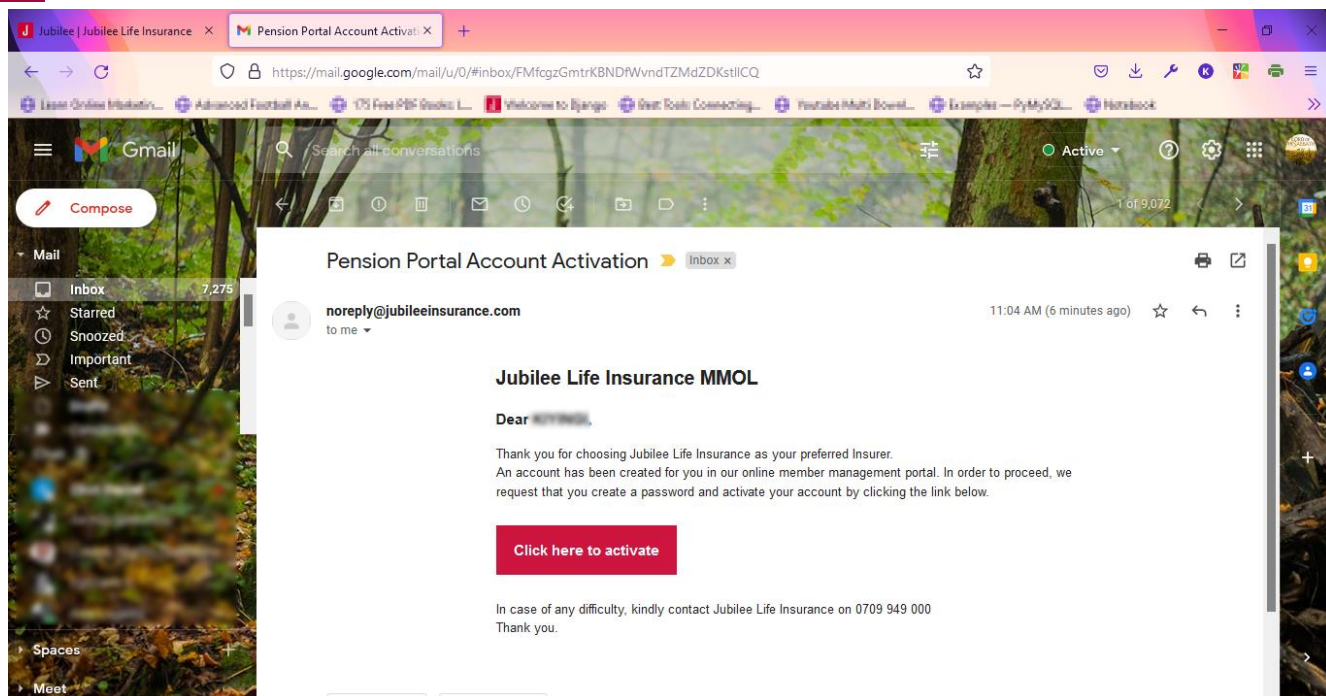
Figure 7 Activation Email

➢ On clicking on Activate account from your email, you will be redirected to a page to set your login password. Create a strong password, which you will always use to login and confirm it by entering it again and Click "<mark>Set Password</mark>" as shown below.
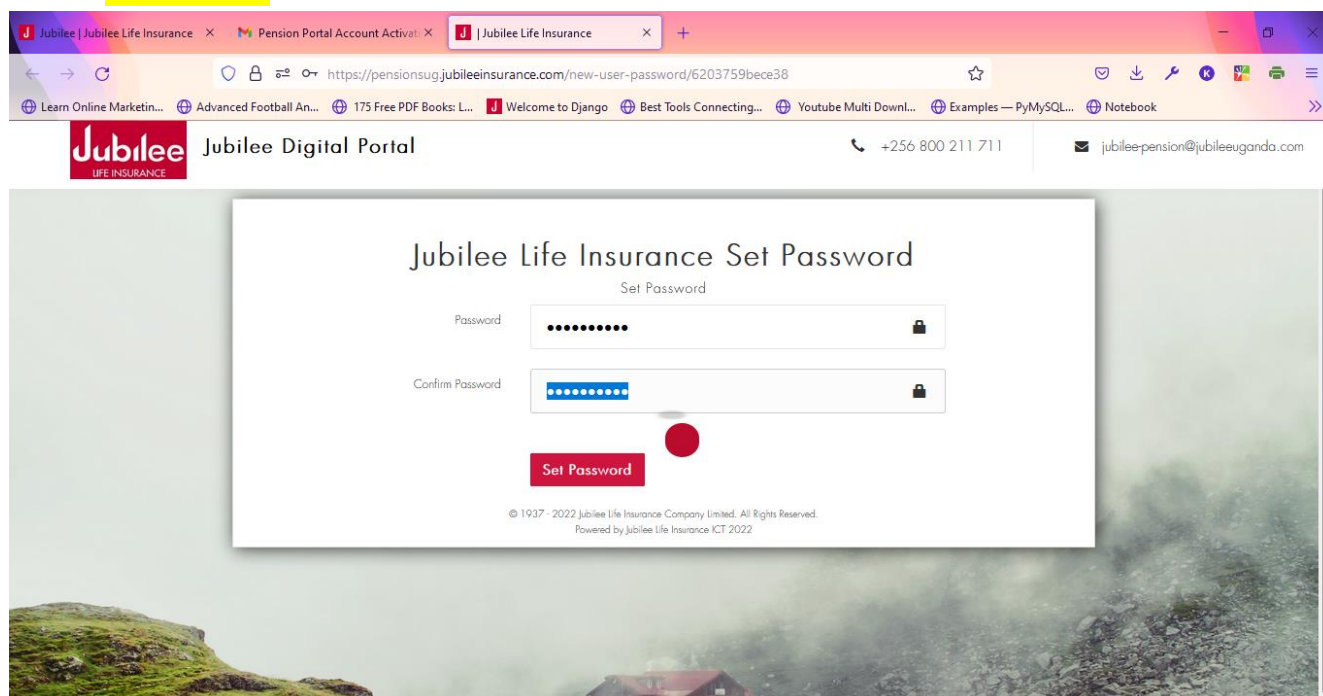

Figure 8 Setting Login Password

➢ **Bingo**! You have now successfully registered and you can now login.

LOGIN

➢ After setting your login Password. You will be redirected to the login page shown below *figure 9.*

➢ From here, you enter the **Company Code**, **National Id Number** and **Password** that you used at your registration the previous steps and click "Sign In".

Figure 9 Login

FORGOT PASSWORD

➢ If you ever forget your password but had done successful registration. You are able to reset it from the same login screen shown above by clicking "Forgot your password?", you will be taken to a page (*figure 10*) where you will enter company code and NIN you used at registration and a link sent to your email to reset your password again.
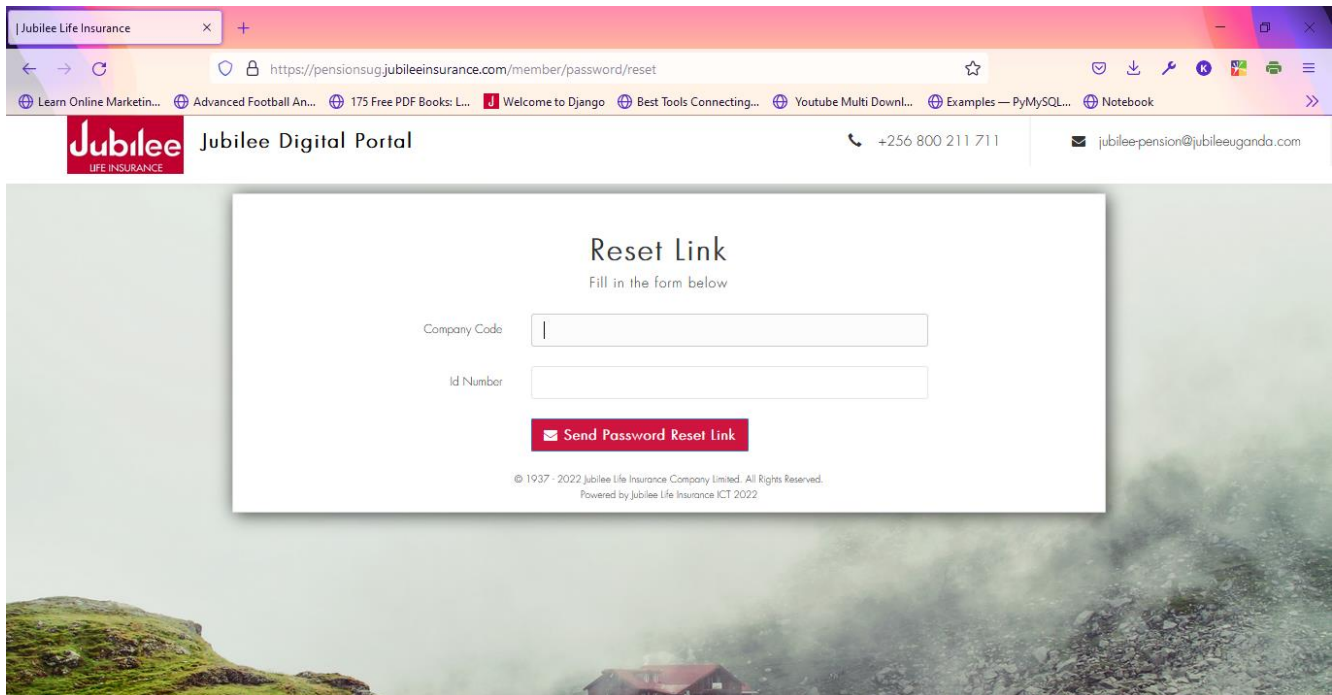
Figure 10 Reset Password

MENU NAVIGATION

Upon successful log in, you will be able to access the navigation Menu.
You can click on any menu item to access different futures currently on the platform i.e. My Profile, Contribution Listing, My Statements, and Benefit Projections.

MY PROFILE

- ➢ When user clicks on "My Profile", here you can view your account details as shown below figure 11.
- ➢ You can also request for update of details by clicking on the button at the end of this page figure 12.
- ➢ When you click "Request Update Details", you will proceed to a page where to update details figure 13.

Figure 11 My Profile

Figure 12 Request Profile Update

Figure 13 Update Details

CONTRIBUTION LISTING

➢ When user clicks on Contribution Listing from the Menu, here he/she is able to view all his/her contribution since time and can filter them using from and to date fields as shown below.

Figure 14 Contribution Listings

MY STATEMENTS

- ➢ For a member to view their published statements, from the menu, click on "My Statements".
- ➢ From the screen shown, click on the drop down and choose the valuation date (by default the latest valuation date is already selected) *figure 15*,
- ➢ Click "Download Member Statement". A statement is generated and downloaded as a pdf file for client to view or print figure 16.

Figure 15

Figure 16 Statement Download

BENEFIT PROJECTIONS

This is an online calculator, which can draw projections based on the investment parameters specified. It helps determine/simulate benefits' projections if one ought to choose that plan.

➤ From the Menu, choose "Benefit Projections", on that shown page *figure 17* enter the investment parameters.

➤ After entering parameters, click "Calculate Benefits" and your projection results will be displayed as shown in *figure 18*.

Figure 17 Benefits Projection Calculator

Figure 18 Projection Results

SIGN OUT

If you are done with interacting with the platform, it is always advised to sign-out of the system for security reasons.
You can sign-out from our platform right of any page you are accessing at a moment.

➢ Click on the green light icon from the upper right corner as shown below *figure 19* to Log out of the system.

CONTACT US

If you ever want to contact us in case of any issues/challenges or inquiries. From the login screen are our contact line and email you can reach us.

CLOSE REMARKS

This portal is still under development, regular updates may be expected, and new features are being added to better serve our clients. We still welcome any suggestions and feedback as we improve the customer experience on the platform and self-services.
If you ever face any technical challenge with this platform, kindly reach us on our contact lines for assistance.
We wish you the all the best, "we're glad you're part of our company!"

Note: Depending on the scheme e.g personal or corporate, some options may not apply e.g. benefits calculator.