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.

1. Go to http://www.oldmutual.co.za and click on **Login**.

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 **Legal Terms and Conditions**

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.

28 April 2010 11:46:00 AM (GMT+2)

| Login | **Register** | Terms & Conditions | Help | Contact Us |

SECURE SERVICES | REGISTER

PERSONAL DETAILS

Please note that fields marked with a "*" are required.

Title:* None

Initial(s):*

Name(s):*

Surname:*

Date of birth:* Day Month Year

Daytime telephone number:* (code and number)

Work telephone number: (code and number)

Cellphone number: (number)

ID type:* RSA ID

ID number:*

Email address:*

Confirm email address:*

☐ I have read and accept the Legal terms and conditions

ACCESS TO MYPORTFOLIO

MyPortfolio gives you access to detailed and up-to-date information on all your Old Mutual policies and investments via the internet.

☐ I would like to register to view my Old Mutual portfolio

Cancel   Continue

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.

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9 February 2009 12:28:49 AM (GMT+2)

| Login | **Register** | Terms & Conditions | Help | Contact Us |

SECURE SERVICES | REGISTER

PASSWORD

Please enter a password:
Your password must be between 6 and 12 characters long and contain at least one UPPERCASE letter, one lowercase letter and one number (e.g. PaSSwoRd12).

Password ●●●●●●●

Confirm Password ●●●●●●●

SECURITY QUESTIONS

Please select and answer three questions from the choices below:
This information will be used in future to verify your identity, should you forget your password or wish to change your password online.

Question 1 | Answer 1
What is your mother's first name? | Pam

Question 2 | Answer 2
What are the 1st and 3rd digits of your bank PIN? | 123

Question 3 | Answer 3
What colour was your first car? | Pink

USERNAME (OPTIONAL)

Once you have registered successfully, the system will generate an 8-digit usernumber that you can use to log in with. However, you can also choose a friendly name with which to log in, your **username**. You can still log in using your usernumber. Your username is just an easier-to-remember name which you can choose. Remember the following when choosing your username:

- It must contain 6 or more characters
- Special characters (*, &, #, -, etc.) are not allowed
- It is not case-sensitive

Examples: JSmith, JohnSmith, John_S

Please select your username

Username: strawberry   Check availability

strawberry IS available

Back   Cancel   Continue

This site has been optimised for Internet Explorer 5.5 or later
Support for other browsers

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5. Usernumber confirmation
This page displays your unique usernumber and your username if you selected one.

You will need this usernumber or username every time you login to Old Mutual's Online Services.
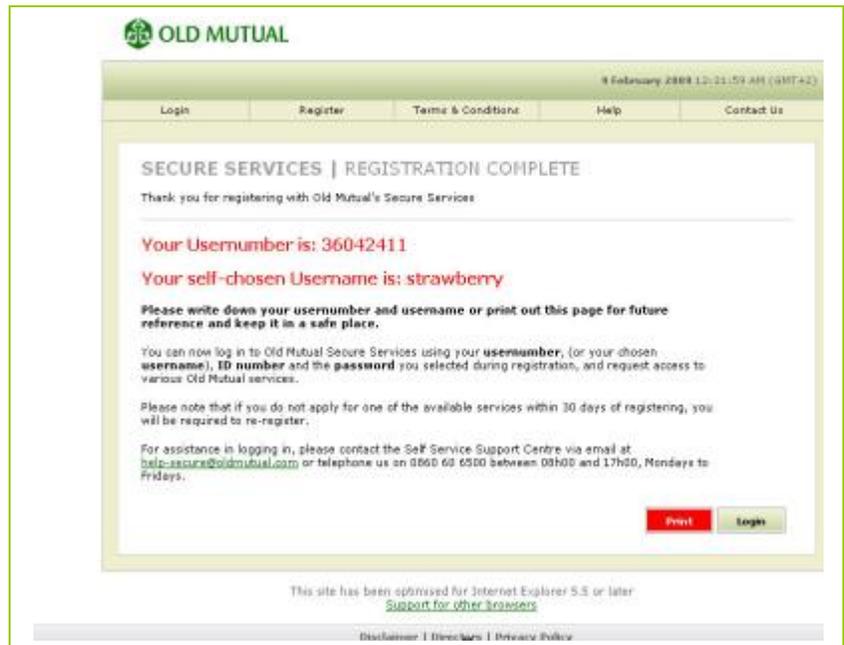
6. You have now successfully completed **step 1**. To proceed, click on Login. Alternatively, go to **https://secure.ssa.oldmutual.co.za/login/login.asp**

Step 2: Apply for access to a specific service

1. Log in
Enter your usernumber or username, ID number and the password you chose during registration. Click on **Login** to continue.

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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**

(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

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3. Delivery details

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

Select the appropriate option and supply the required information.

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.

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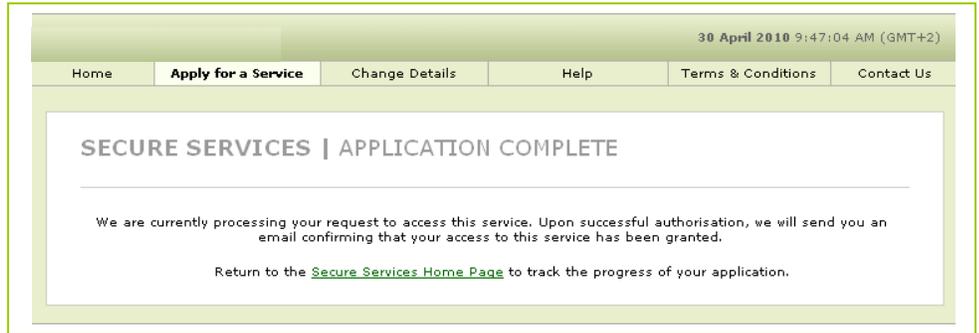
If you have applied for Retirement Scheme Administration (Transact access), we will need to verify your details as part of ensuring your online security. You will receive a visit from a courier service within 5 days. They will ask to see your Identity Document. Once you have been successfully verified,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