

# 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 these.

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, the post or from the call centre.

## 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 455 455

Outside South Africa: +27 21 503 1727

E-mail: RFAMembers@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. On the Login screen, click on **Register for a service**.

### 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. If you wish to, you can apply for this at another time. You will then need to have one of your contract numbers handy to complete the application process for MyPortfolio.

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

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### 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.

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

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### 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. Pa55w0rd12).

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 What is your mother's first name?	Answer 1 Pam
Question 2 What are the 1st and 3rd digits of your bank PIN?	Answer 2 123
Question 3 What colour was your first car?	Answer 3 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 usernames:

- 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:  [Check availability](#)

**strawberry IS available**

Back Cancel Continue

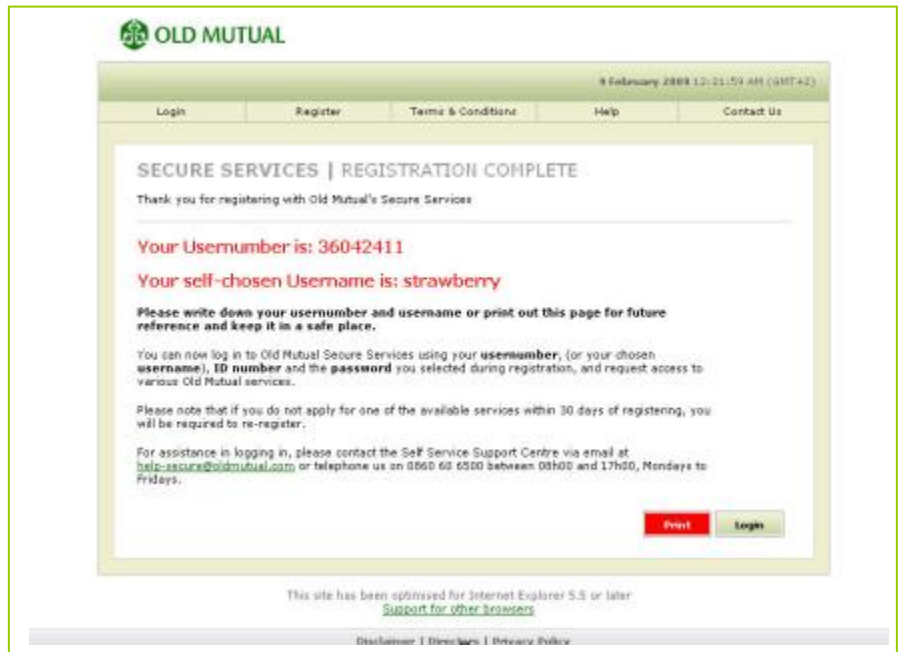
This site has been optimised for Internet Explorer 5.5 or later  
[Support for other browsers](#)

[Disclaimer](#) | [Directors](#) | [Privacy Policy](#)

## 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.



## 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**

The screenshot shows a web interface titled "APPLY FOR A SERVICE". Below the title, it says "Please select your role." and has a "View all roles" button. A dropdown menu is open, showing "CLIENT SERVICES" as the selected category. Under this category, several roles are listed with radio buttons. The "Retirement Scheme Administration" role is selected and highlighted with a green box. Below this, there are four sub-roles under "Retirement Scheme Administration": "Retirement Scheme Administration (View access)", "Retirement Scheme Administration (Transact access)", "EB-Data I: Payroll Servicer", and "EB-Data I: Enquiry Viewer".

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

- **Retirement Scheme Administration (View access):** Select this service if you want to view your account balance and membership information.
- **Retirement Scheme Administration (Transact access):** Select this service if you want to:
  - view your account balance and membership information and
  - switch on-line between investment portfolios as allowed by the Scheme Rules.

### 3. Delivery details (only displayed if Retirement Scheme Administration Transact access is requested)

As part of ensuring your online security, your details will need to be verified.

Select the appropriate option and supply the required information.

Mrs Dyssel (58134748) 22 June 2010 12:42:06 AM (GMT+2)

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### SECURE SERVICES | DELIVERY DETAILS

#### SUPPLY DETAILS

To successfully complete your application to this service, we need to verify your identity. Please select your location and fill in the relevant information where applicable.

**I live in South Africa.**

Customers living in South Africa will be visited by a Courier agent. Only the person whose name is registered for Secure Services will be verified and the courier agent will require proof of identity in the form of a valid identity book. **A copy of your ID document also needs to be handed to the courier for delivery to Old Mutual.** Driver's licenses will not be accepted.

From the time that you submit your delivery details, a waiting period of up to 3 days can be expected before you will be visited by the courier agent. Visits by the courier take place between 08h00 and 17h00, Mondays to Fridays.

**Please note:** A P.O. Box number cannot be accepted as a valid delivery address.

Delivery address:

Suburb:

City:

Postal code:

Telephone number and area code (working hours):  -

**I live outside South Africa.**

You will receive email instructions for verification from Old Mutual within 48 hours of submitting this form.

**I am an Old Mutual employee.**

You will receive an email instruction once your submission has been processed.

Cancel Continue

### 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.

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### SECURE SERVICES | APPLY FOR A SERVICE

#### SUPPLY DETAILS - RETIREMENT SCHEME ADMINISTRATION | TRANSACT

Please enter your client number:

Please note that only a unique client number communicated to you personally in writing will be accepted here. Should you not have received a letter advising you of your client number you will not be granted access to this on-line administration facility. Where you have not received such a letter, then please continue to use your existing method of communication with regard to matters relating to your retirement vehicle.

Back Cancel Continue

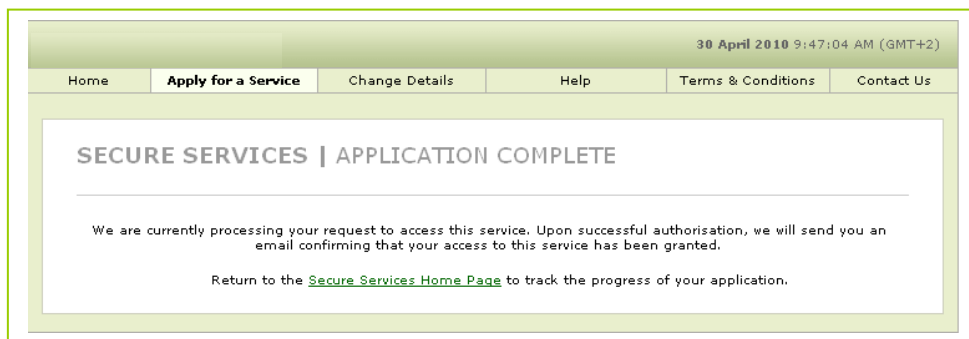
Remember this is **not your 8-digit usernumber** and will **not** be accepted if you use it here.

**\* Should you not have this number at hand or are uncertain of which to use, kindly contact the Old Mutual Retirement Fund Administration Service Centre on 0860 455 455.**

## 5. Activation of your service

Your application is now complete.

If you have applied for Retirement Scheme Administration (View access) 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. 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.