Member Portal User Guide

By

Kenyan Alliance Insurance Co. Ltd

Contents

CLIENT PORTAL

This is the E-services portal we have designed to enhance the convenience at which our members are able to access different KAI services.

PORTAL SIGN UP

Provided that you are a member of any scheme, one should be able to register easily to the portal system and enjoy the ease of access and benefits that come with the portal. The URL address is; **https://kaiportal.azurewebsites.net**

The URL opens up a window as shown below with a login form, home button and signup button.

You can only login if you have an account with login credentials which consist of a username and a password.

If not click on the sign up button to create your account.

Sign Up

To sign up to the portal click on Sign up button.

A sign up form opens up with the following fields; full name, email, mobile number, scheme, employer, ID number and password.

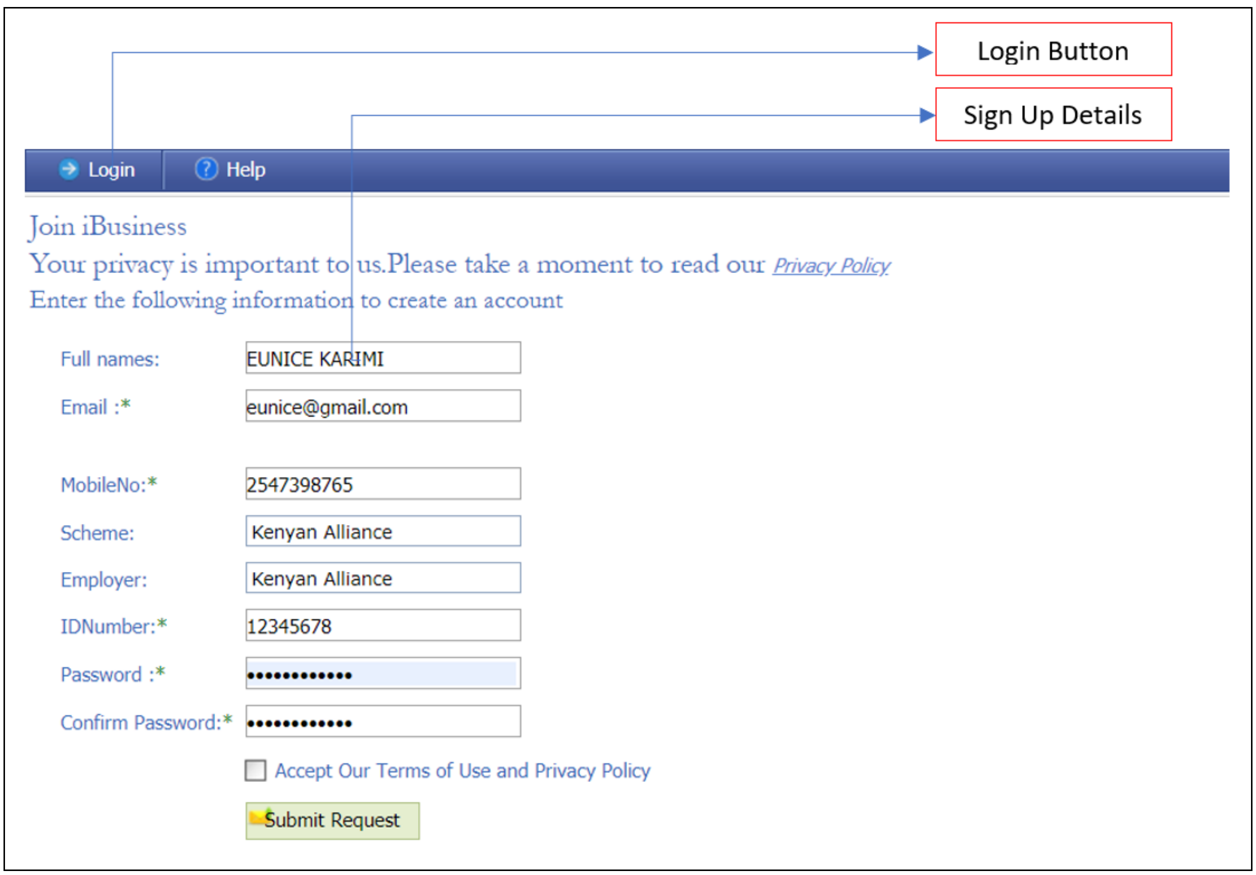
Ensure you sign up by providing the correct and appropriate details for your full name email address, scheme name, employer, ID number and mobile number fields.

Note: Your mobile number should start with your country code e.g. 254701234567.

Enter your password and reenter to confirm.

Once you have filled all the details, check on the checkbox against "Accept Our Terms of Use and Privacy Policy".

Finally click on "Submit Request".



Log In (Access)

Once you have submitted your sign-up request, it is approved by the administrator and a notification is sent to your email address that you provided while signing up. You can now go ahead and login using the same credentials you had filled during sign up. Click on Log in button to access your member portal.

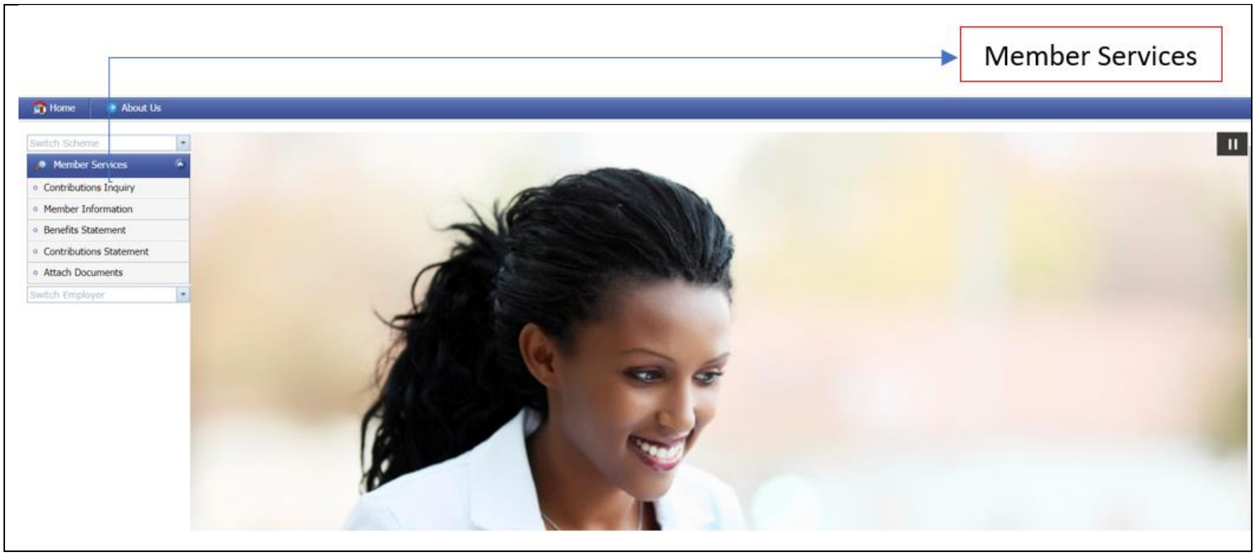
Forgot Password

In the case where you forget your password, you can always recover your password by clicking the “Forgot Password” button that is usually on the “log in” form.

This opens up a portal recovery page. Enter your email address, confirm the code then click on the “email me login details” button.

Your login credentials will be sent to your email address.

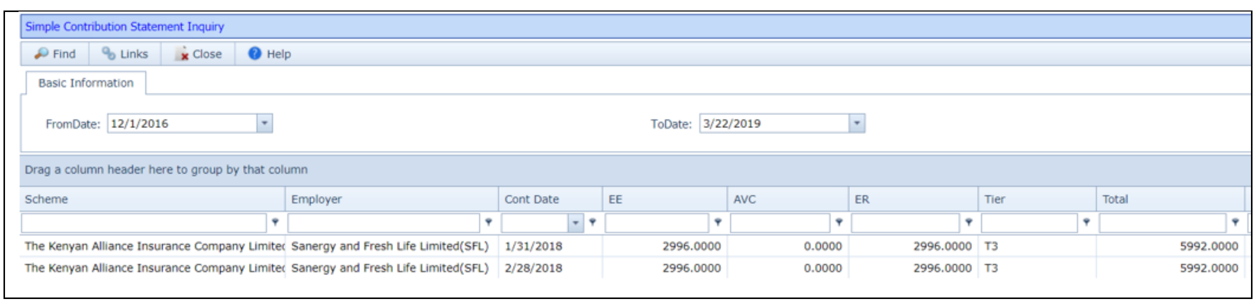
MEMBER SERVICES



Once you are logged in, you can access the following services

Contributions Inquiry

A person can check on all the monthly contributions they have made over a period of time. One only requires to have the period of time they want and a statement of all the contributions made is generated. To inquire on your contributions, set the FromDate and the ToDate then click Find and a report will be generated at the grid view.

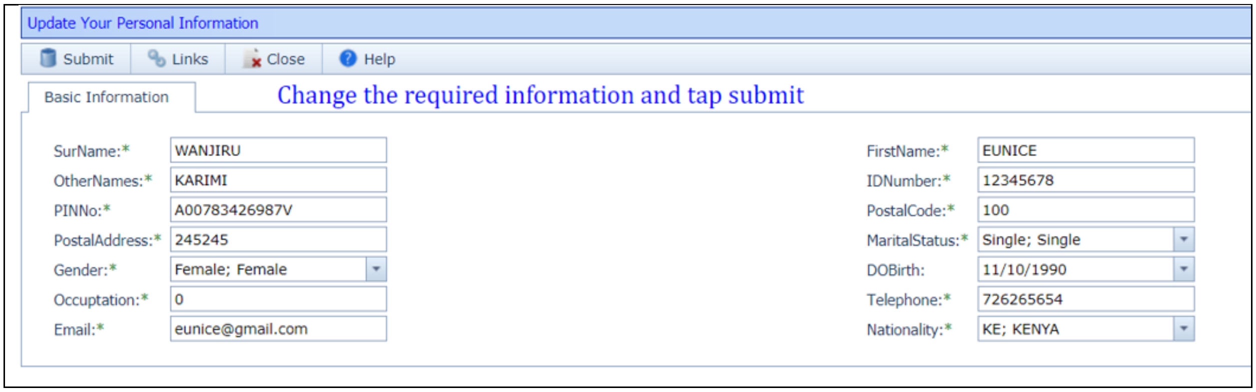


Scheme	Employer	Cont Date	EE	AVC	ER	Tier	Total
The Kenyan Alliance Insurance Company Limitec	Sanergy and Fresh Life Limited(SFL)	1/31/2018	2996.0000	0.0000	2996.0000	T3	5992.0000
The Kenyan Alliance Insurance Company Limitec	Sanergy and Fresh Life Limited(SFL)	2/28/2018	2996.0000	0.0000	2996.0000	T3	5992.0000

Member Information

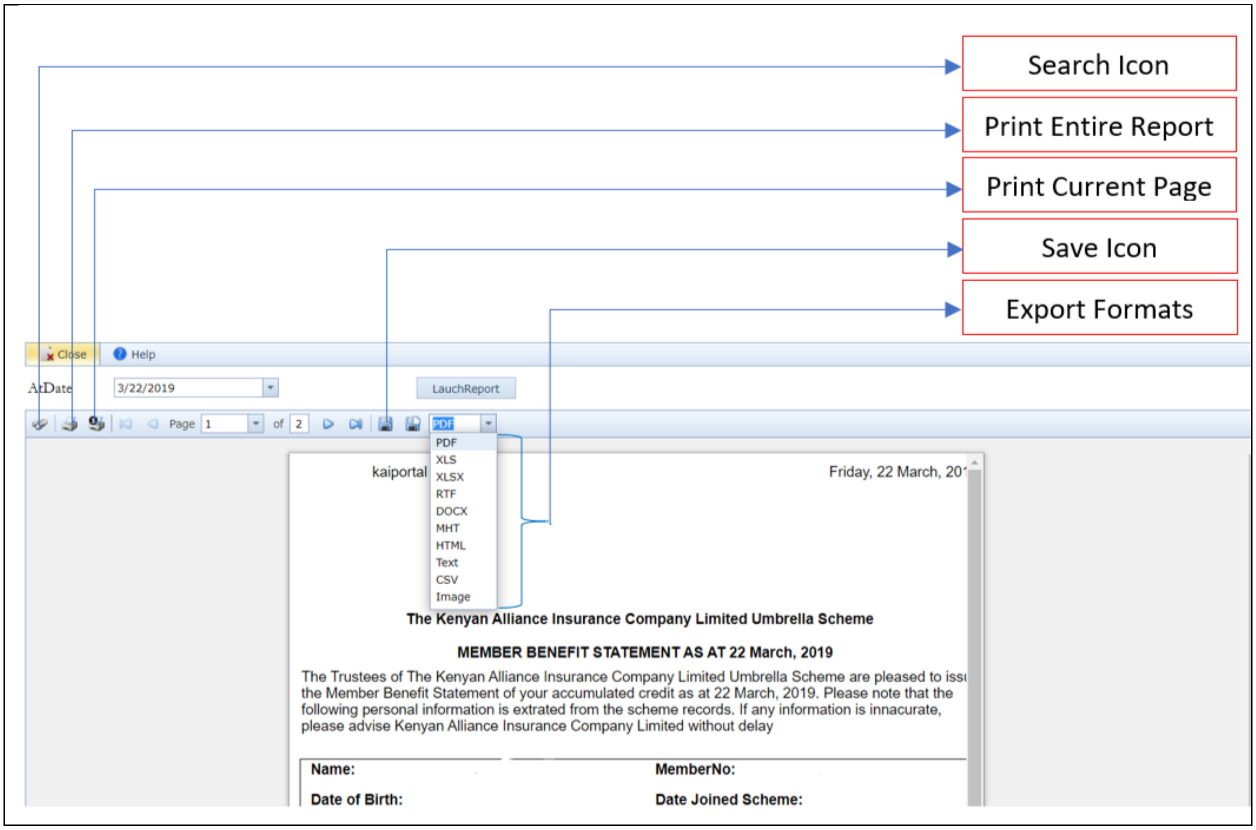
A person can update their personal information using this page.

To update your information, capture all the fields that one requires to update such as your surnames, telephone number,postal address and then click Submit.Your registration details are received by the administrator,reviewed and then approved.



Benefits Statement

A member can generate their Benefits statement as per a certain date that they want. To generate a report enter the date as to which you want to view the report then click the LaunchReport button and a report shall be generated as indicated below

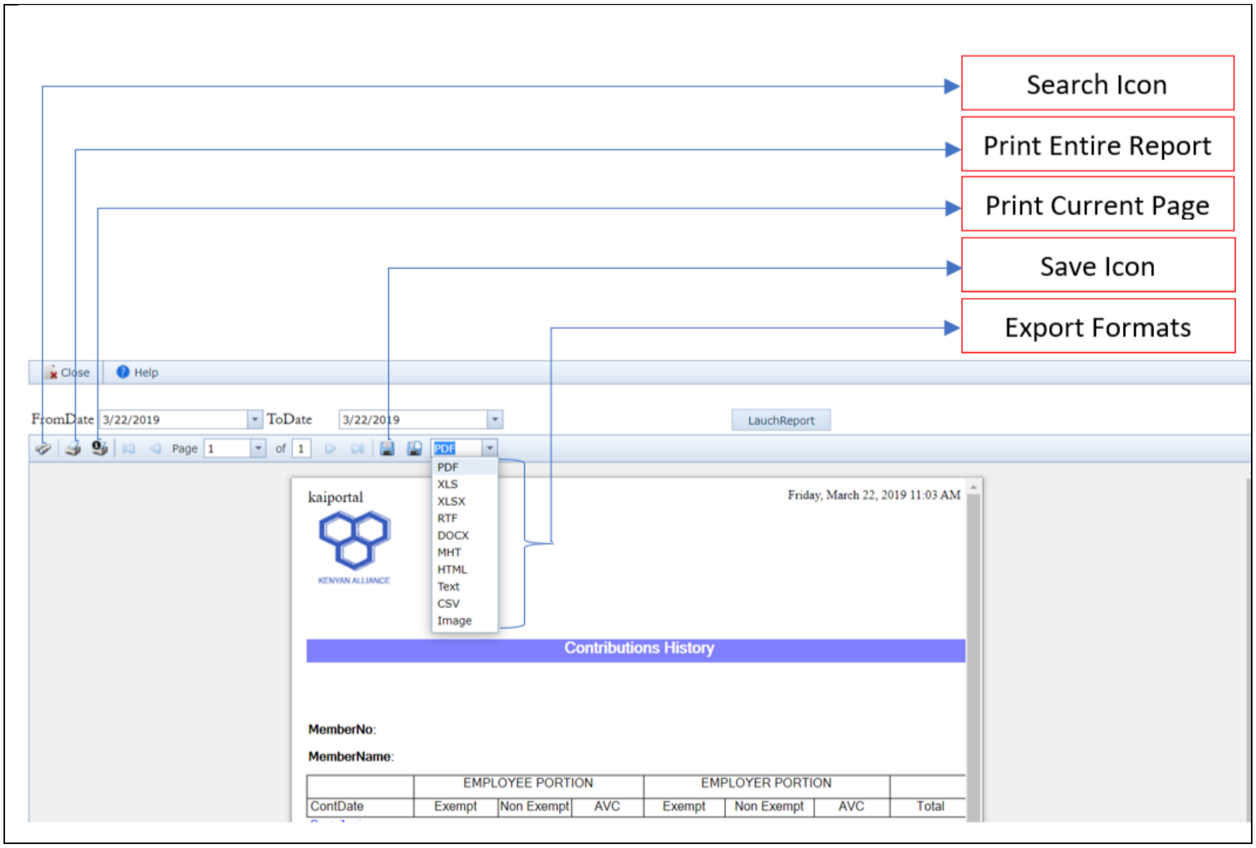


Contributions Statement

Contributions statements page gives a report about a member's contributions in the scheme.

To launch Contributions Statement, select FromDate and ToDate and then click the launch button.

A sample report of the launched report is shown below.



To Search. You can search for any name or item within the report through clicking on the search icon, typing the item to search for and then clicking on the Find Next button until the item you are searching for is high lightened.

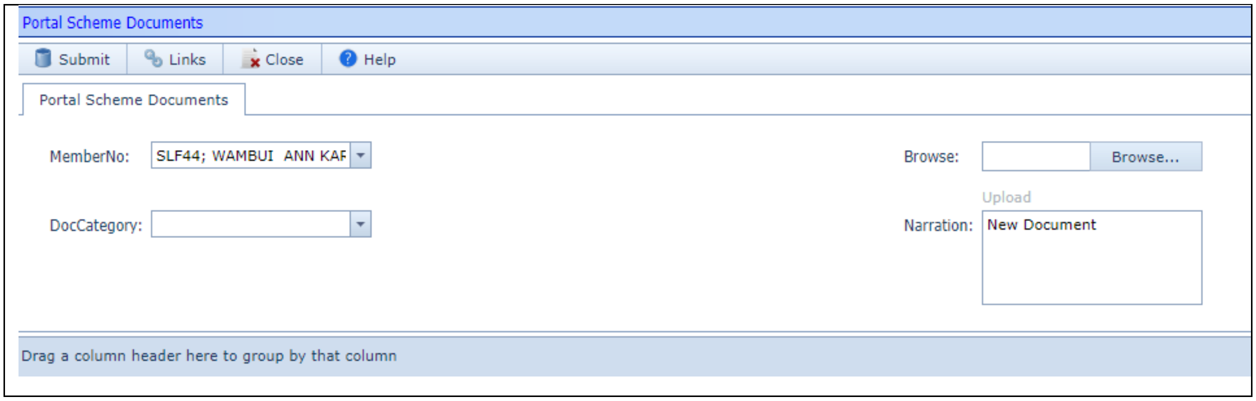
To Export. One can export this report to another format for cross verification purposes. Select the output from the various export options available then click on the Export icon.

To Print. The report can be printed by a click on the print icon.

Attach Documents

The integrated Electronic Document Storage and Retrieval feature dispenses with the need for filing key documents such as Membership documents, Trust deeds and rules, Beneficiary nomination form, ID number or any other document belonging to a member. These are scanned as a batch to server files, using a standard digital photocopier. The Document Image files are automatically processed by a PC-based "scanning engine" which reads the document type and reference and stores the file in a manner so that it can be retrieve very quickly when needed, making the process easy and quick, with little user involvement.

To upload a document, Click Browse button to locate the document then click Upload below browse field, select DocCategory and enter any remarks or comments you have on Narration box and then click Submit botton.

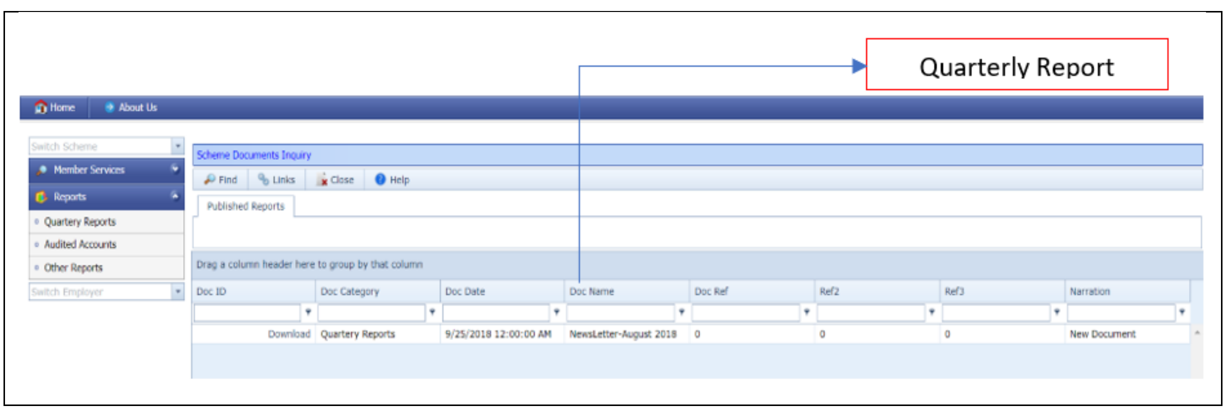


REPORTS

There are several reports published periodically that the clients have access to in the portal. These are;

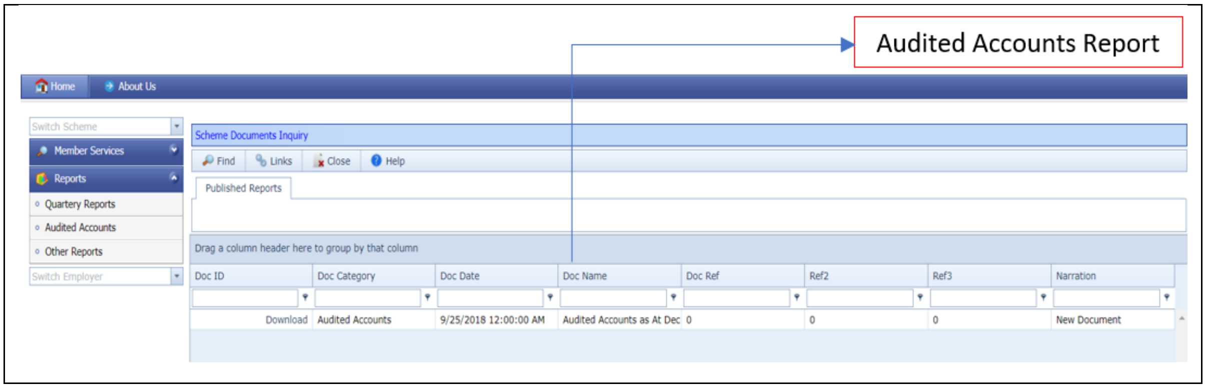
Quarterly Reports

Quarterly Reports are the reports scheme administrators publish. These reports may include; Newsletters. Upon clicking the download button, the selected report downloads into your computer.



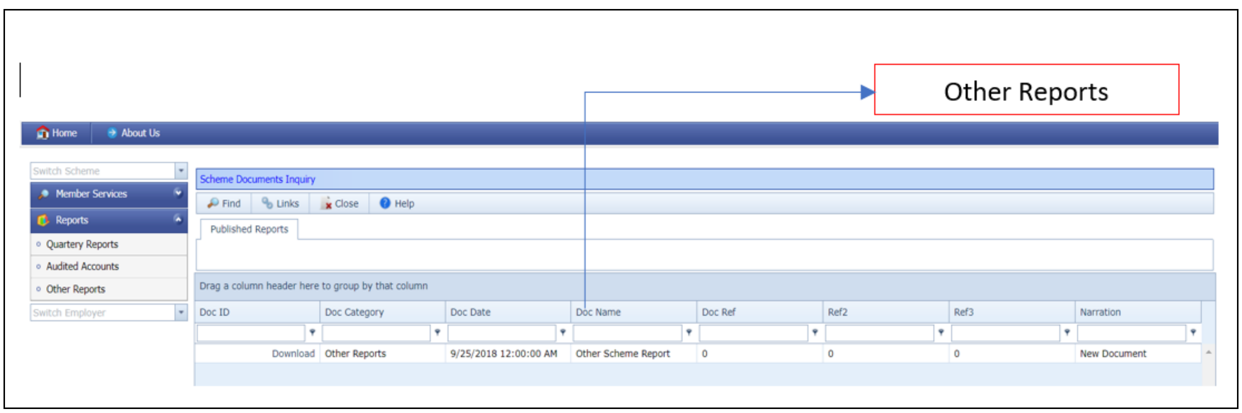
Audited Accounts

The audited accounts report is a report that details the opinion of an auditor regarding the scheme's financial statements. Such reports are published by the scheme administrators and the scheme members can download them from the client portal



Other Reports

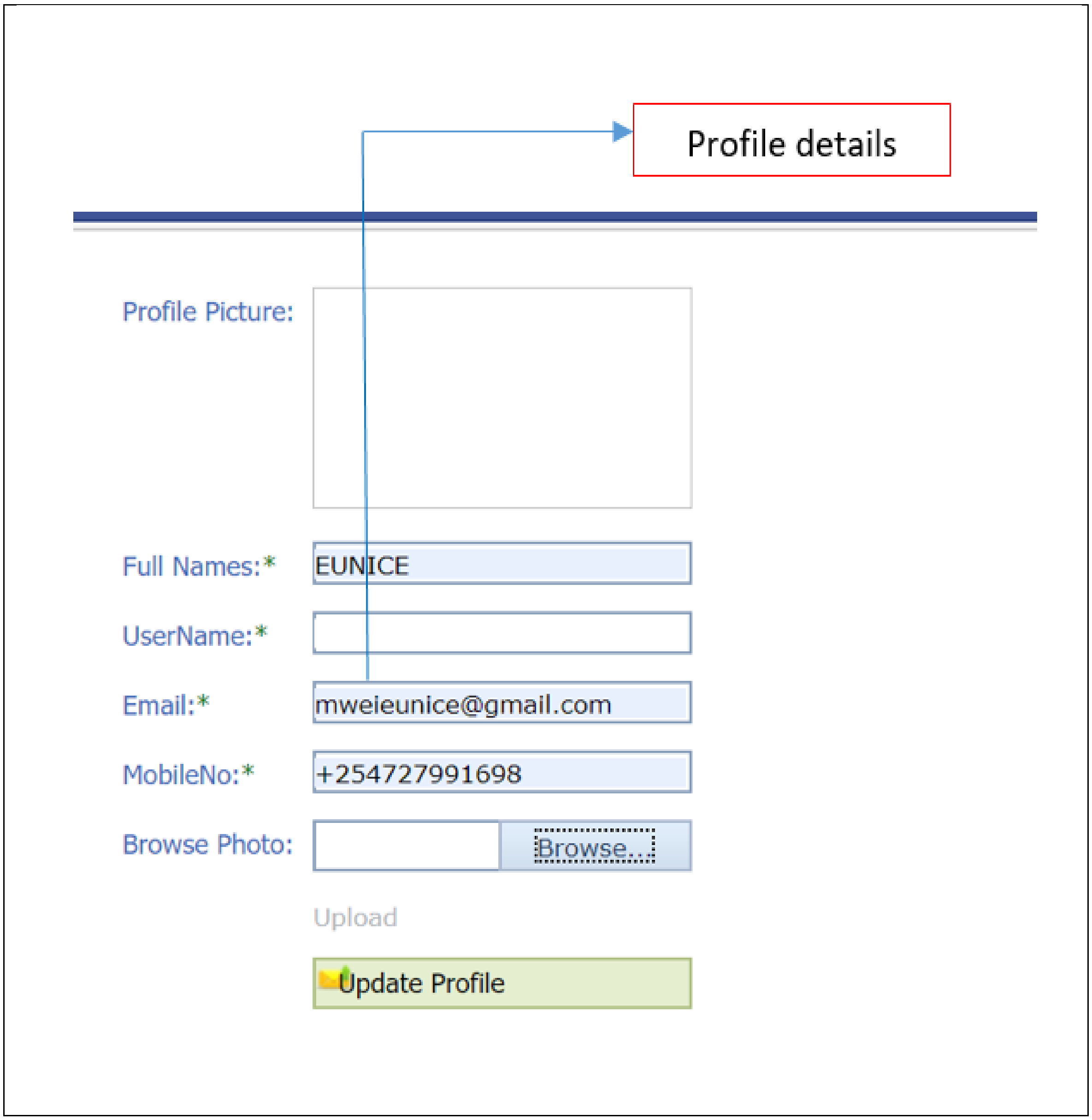
This page contains any other reports the scheme administrators have published for access by the members.



UPDATING PROFILE

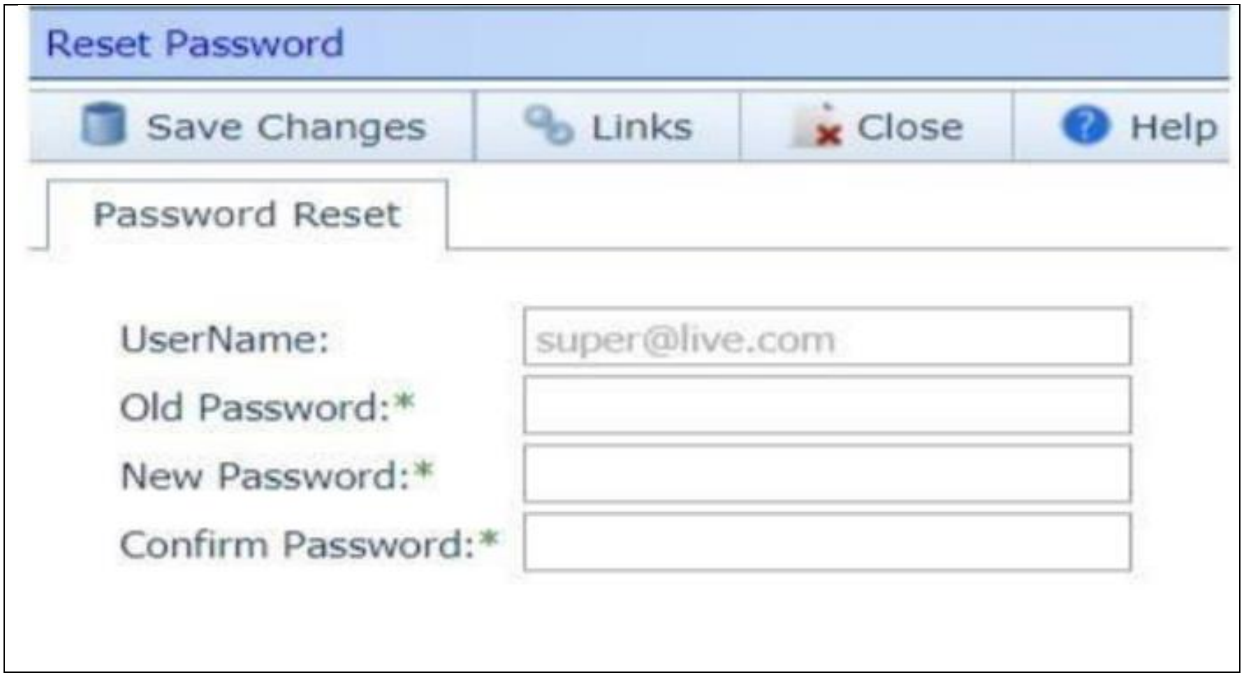
Edit Profile

You can edit your profile details in the edit profile menu that appears in the drop down menu under "My Profile". After filling in the new profile details click on "Update Profile" for your changes to be saved



Reset Password

One can also edit their password in the Reset Password field that appears in the drop-down menu. Enter the old password, then the new password, confirm the new password then save the changes by clicking Save Changes.



Sign Out

To sign out of the member services portal, click "Sign Out" button that is on the top-right corner of the home page