



Member Portal User Guide

By

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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”.

The screenshot shows a web interface for signing up. At the top, there is a dark blue navigation bar with 'Login' and 'Help' links. Below this, the text 'Join iBusiness' is displayed, followed by a privacy notice: 'Your privacy is important to us. Please take a moment to read our [Privacy Policy](#)'. The main heading is 'Enter the following information to create an account'. The form fields are as follows:

Full names:	EUNICE KARIMI
Email :*	eunice@gmail.com
MobileNo:*	2547398765
Scheme:	Kenyan Alliance
Employer:	Kenyan Alliance
IDNumber:*	12345678
Password :*
Confirm Password:*

Below the password fields, there is a checkbox labeled 'Accept Our Terms of Use and Privacy Policy' which is currently unchecked. At the bottom of the form is a green 'Submit Request' button. Two red boxes with arrows point to 'Login Button' and 'Sign Up Details' in the top right corner of the page.

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.

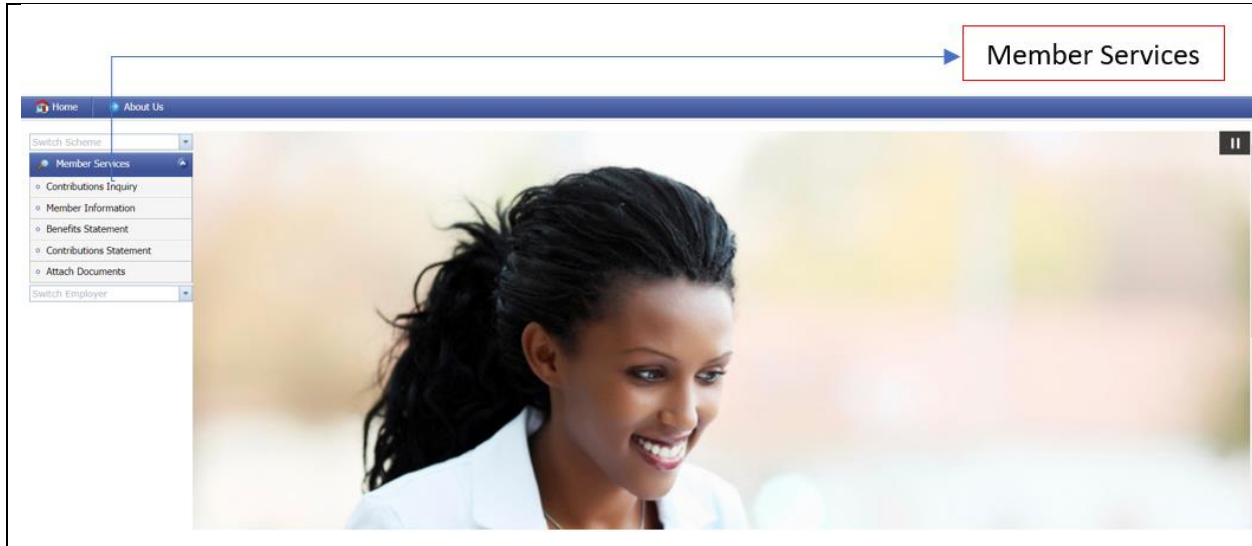
This opens up a portal recovery page. Enter your email address, confirm the code then click on the “email me login details” button.



The screenshot shows a web interface for account recovery. At the top, there is a blue navigation bar with 'Login' and 'Help' links. Below this, the page title is 'Portal Account Recovery:'. A message states: 'Your privacy is important to us. Please take a moment to read our [Privacy Policy](#) . Enter your email address below and tap the button below. We will send you the Sign In details.' The form includes an 'Email Address:*' input field, a 'Code Verification:' section with a large image of the code 'J763y', a 'Type the code shown:' input field, a 'Show another code' link, and a green '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.

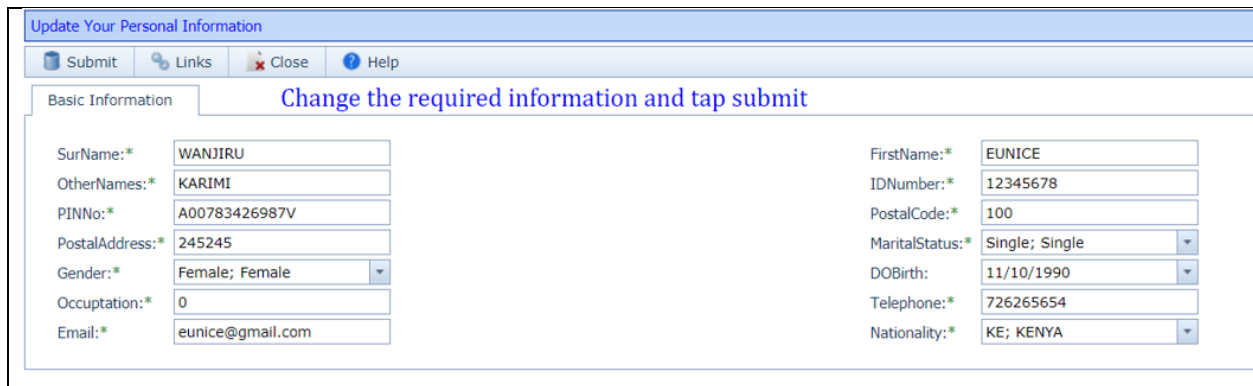
The screenshot shows the 'Simple Contribution Statement Inquiry' form. The form has fields for 'FromDate' (12/1/2016) and 'ToDate' (3/22/2019). Below the form is a table with columns: Scheme, Employer, Cont Date, EE, AVC, ER, Tier, and Total. Two rows of data are shown.

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

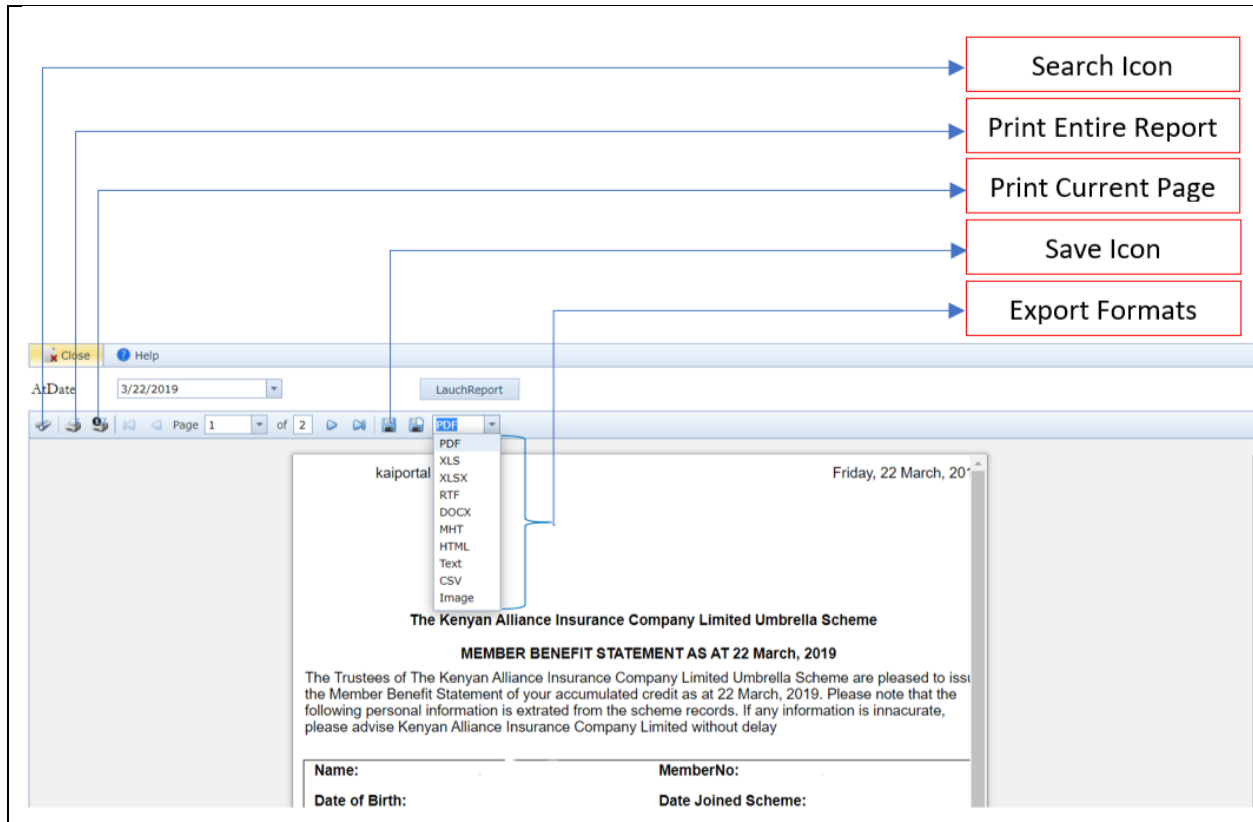


The screenshot shows a web form titled "Update Your Personal Information". At the top, there is a navigation bar with buttons for "Submit", "Links", "Close", and "Help". Below this is a tabbed interface with a "Basic Information" tab selected. A blue instruction text reads "Change the required information and tap submit". The form contains two columns of input fields:

SurName:*	WANJIRU	FirstName:*	EUNICE
OtherNames:*	KARIMI	IDNumber:*	12345678
PINNo:*	A00783426987V	PostalCode:*	100
PostalAddress:*	245245	MaritalStatus:*	Single; Single
Gender:*	Female; Female	DOBirth:	11/10/1990
Occupation:*	0	Telephone:*	726265654
Email:*	eunice@gmail.com	Nationality:*	KE; KENYA

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

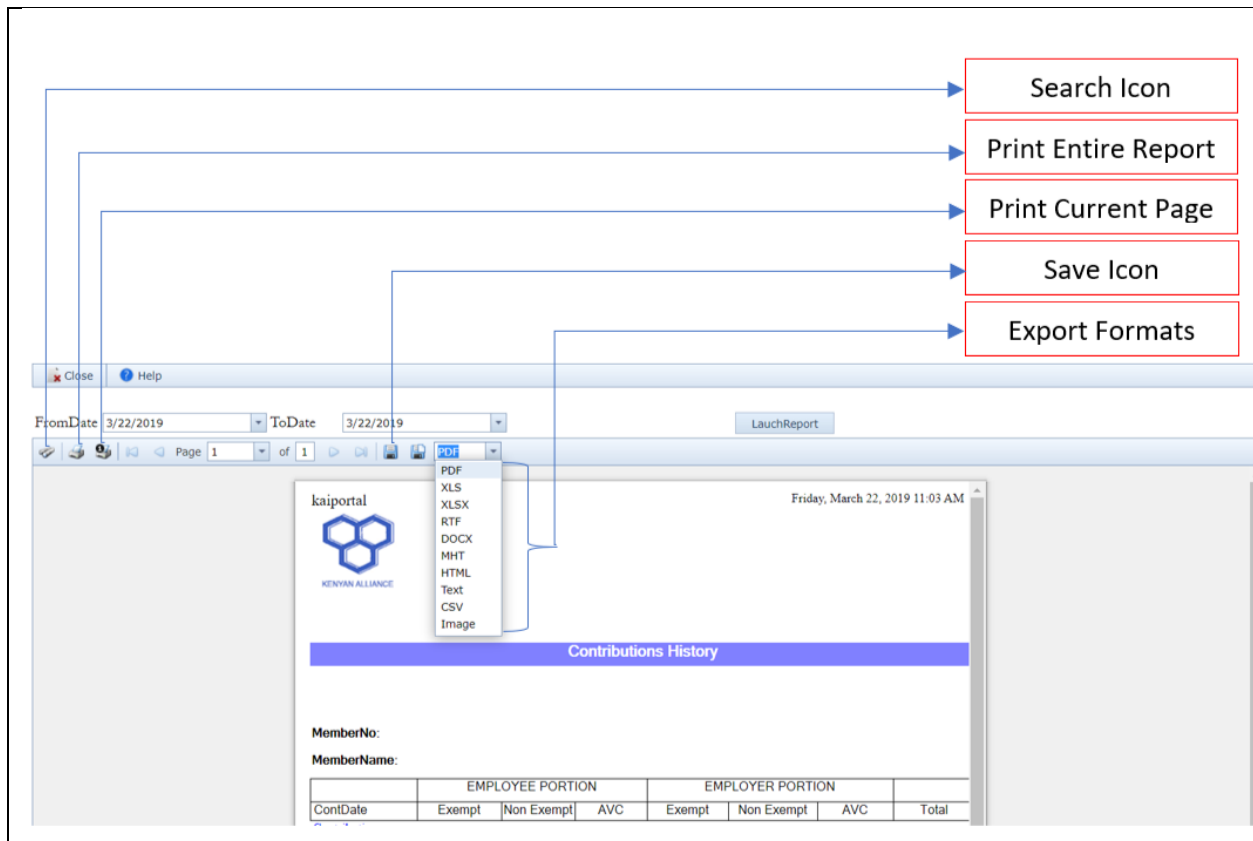


Contributions Statement

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](#) button.

The screenshot shows a web interface titled "Portal Scheme Documents". At the top, there are navigation buttons: "Submit", "Links", "Close", and "Help". Below this, the page title "Portal Scheme Documents" is displayed. The form contains the following fields and controls:

- MemberNo:** A dropdown menu with the selected value "SLF44; WAMBUI ANN KAF".
- DocCategory:** An empty dropdown menu.
- Browse:** A text input field followed by a "Browse..." button.
- Upload:** A section containing a "Narration:" label and a text area with the text "New Document".

At the bottom of the form, there is a footer instruction: "Drag a column header here to group by that column".

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.

The screenshot displays the "Scheme Documents Inquiry" page. A red box highlights the "Quarterly Report" entry in the table, with an arrow pointing to it from a label "Quarterly Report". The table has the following structure:

Doc ID	Doc Category	Doc Date	Doc Name	Doc Ref	Ref2	Ref3	Narration
Download	Quarterly Reports	9/25/2018 12:00:00 AM	Newsletter-August 2018	0	0	0	New Document

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

The screenshot shows the 'Scheme Documents Inquiry' page. A red box labeled 'Audited Accounts Report' points to the 'Audited Accounts' entry in the table below. The table has columns for Doc ID, Doc Category, Doc Date, Doc Name, Doc Ref, Ref2, Ref3, and Narration. The entry for 'Audited Accounts' has a Doc Date of 9/25/2018 12:00:00 AM and a Narration of 'New Document'.

Doc ID	Doc Category	Doc Date	Doc Name	Doc Ref	Ref2	Ref3	Narration
	Audited Accounts	9/25/2018 12:00:00 AM	Audited Accounts as At Dec 0	0	0	0	New Document

Other Reports

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

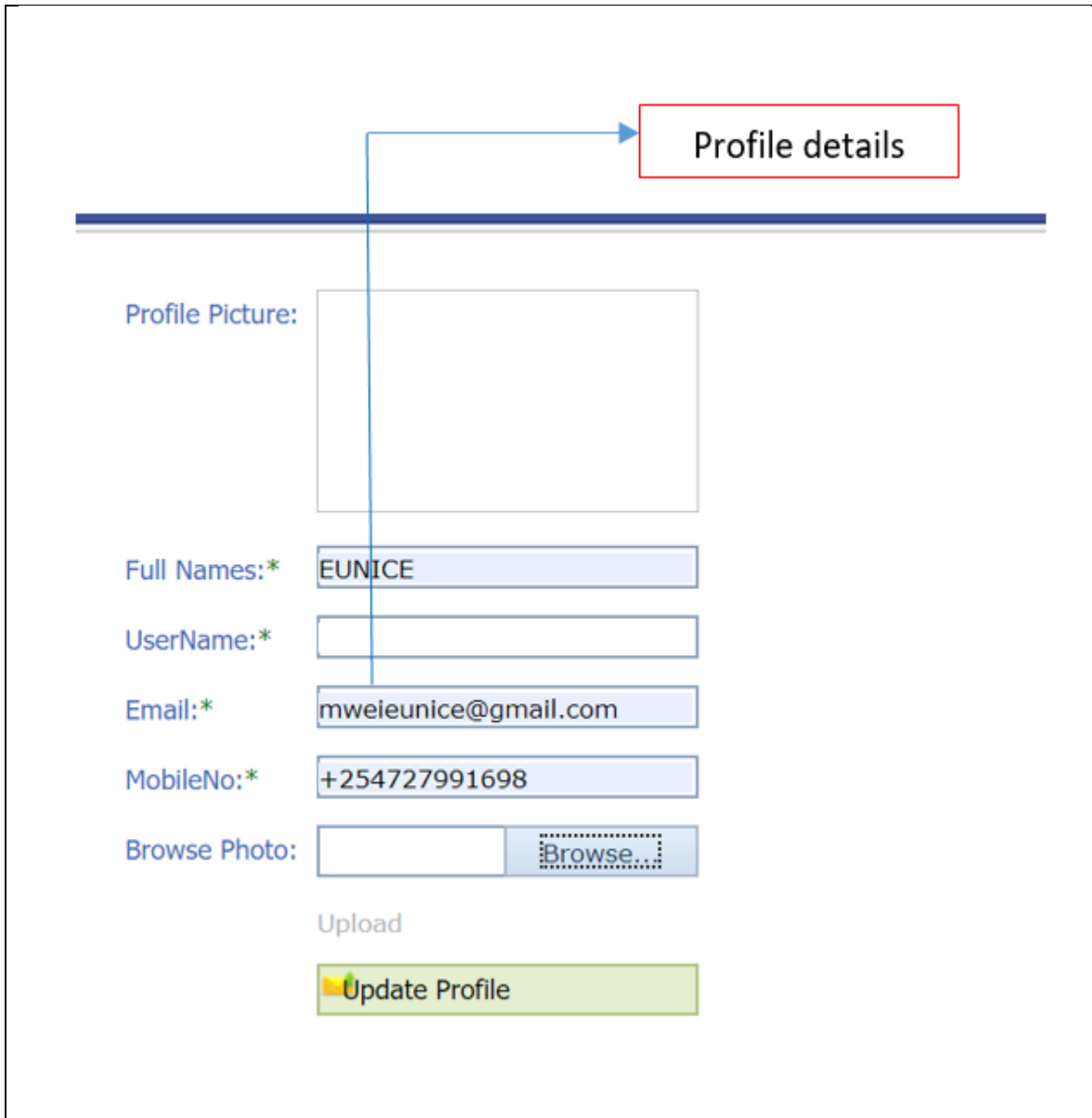
The screenshot shows the 'Scheme Documents Inquiry' page. A red box labeled 'Other Reports' points to the 'Other Reports' entry in the table below. The table has columns for Doc ID, Doc Category, Doc Date, Doc Name, Doc Ref, Ref2, Ref3, and Narration. The entry for 'Other Reports' has a Doc Date of 9/25/2018 12:00:00 AM and a Narration of 'New Document'.

Doc ID	Doc Category	Doc Date	Doc Name	Doc Ref	Ref2	Ref3	Narration
	Other Reports	9/25/2018 12:00:00 AM	Other Scheme Report	0	0	0	New Document

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

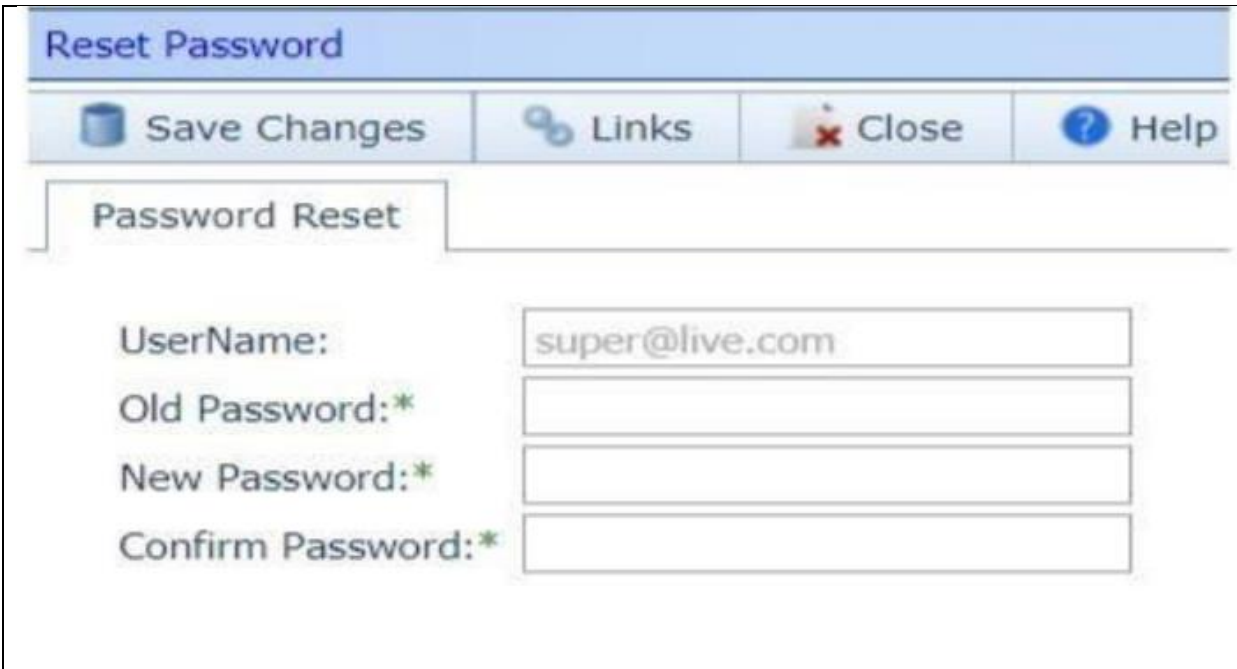


The image shows a screenshot of a web form for editing a profile. A red-bordered box labeled "Profile details" is positioned at the top right, with a blue arrow pointing to the "Full Names" field. The form includes the following fields and elements:

- Profile Picture:** A large empty rectangular box.
- Full Names:*** A text input field containing "EUNICE".
- UserName:*** An empty text input field.
- Email:*** A text input field containing "mweieunice@gmail.com".
- MobileNo:*** A text input field containing "+254727991698".
- Browse Photo:** A text input field followed by a "Browse..." button with a dotted border.
- Upload:** A label positioned below the "Browse Photo" field.
- Update Profile:** A green button with a yellow play icon and the text "Update Profile".

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.



The screenshot shows a web interface for resetting a password. At the top, there is a blue header bar with the text "Reset Password". Below the header is a navigation bar with four buttons: "Save Changes" (with a floppy disk icon), "Links" (with a chain link icon), "Close" (with a red 'x' icon), and "Help" (with a question mark icon). Below the navigation bar is a section titled "Password Reset" in a light blue box. Underneath this section are four input fields with labels: "UserName:" (containing "super@live.com"), "Old Password:*", "New Password:*", and "Confirm Password:*".

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