GEMINI

GEMINI Collective Foundation

CONNECT FOR EMPLOYERS
INSTRUCTIONS AUTHORISATION

January 2023

Contents

1 Purpose

Connect is the employer portal of the GEMINI Collective Foundation (hereinafter referred to as Foundation). Access data for Connect will be given to one person per customer (administrator). The administrator can grant specific permissions for additional persons on Connect, for example brokers/trustees. This document explains the respective process.

2 Homepage and navigation

The header at the top of the screen lists various functions as well as your documents and settings.

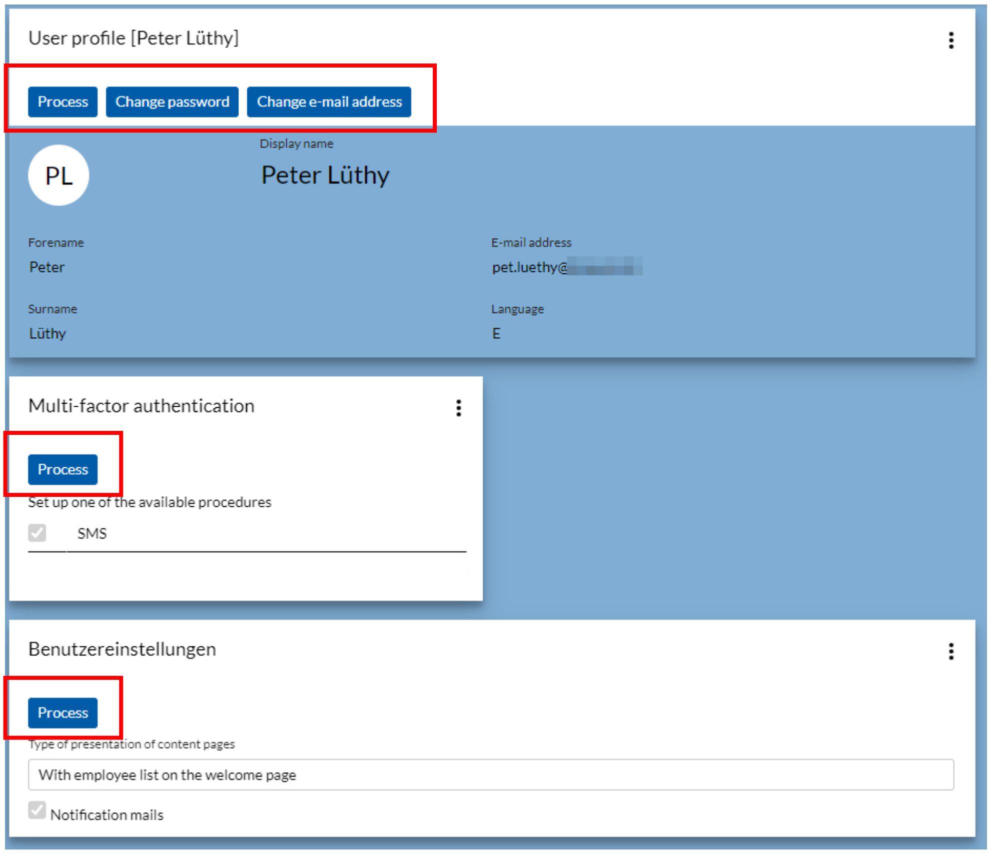
1. Navigation
Use the menu symbol to show and hide the navigation column on the left margin of the screen.

2. Logo
Click on the logo to return to the homepage.

3. Three-dot menu
Click on your user name or the three-dot menu to open the user settings or log out of Connect. De-tails regarding the user settings can be found in the "User settings" chapter.

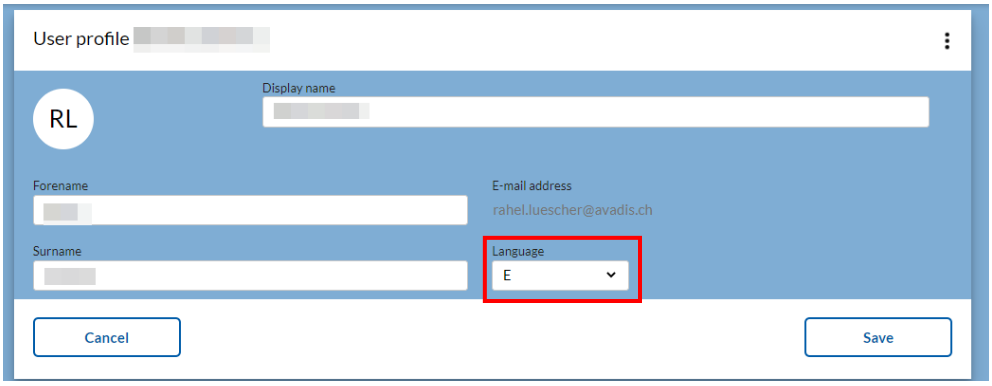
3 User profile

You can edit your user settings in the user profile.



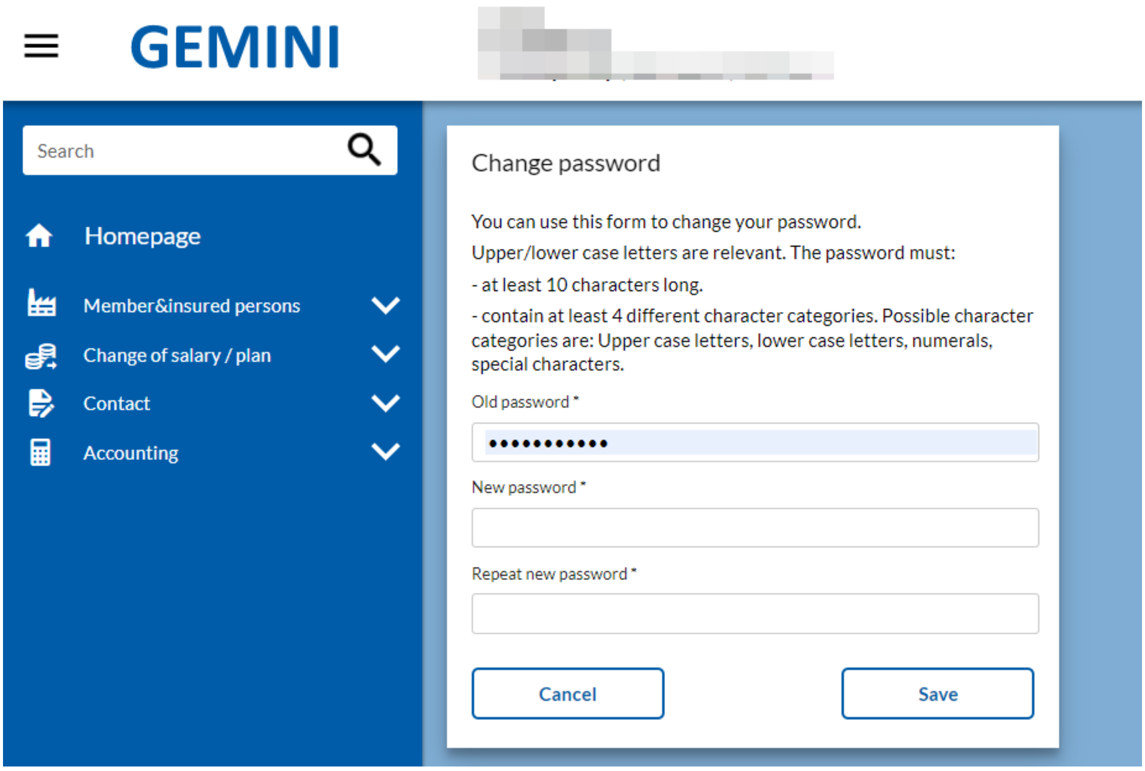
3.1 Edit: user name and language setting

You can change your user name and the language setting for your Connect account via the “Process” button. Please note that these changes will not become active until the next login.



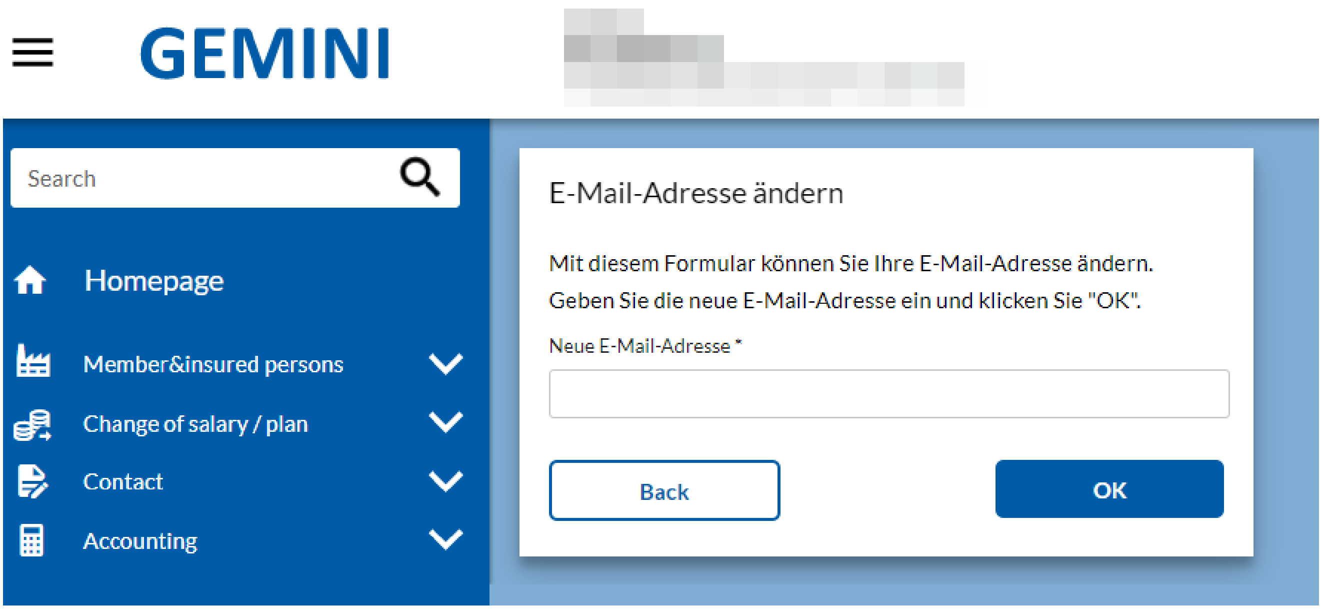
3.2 Change password

Click “Change password” to create a new password.



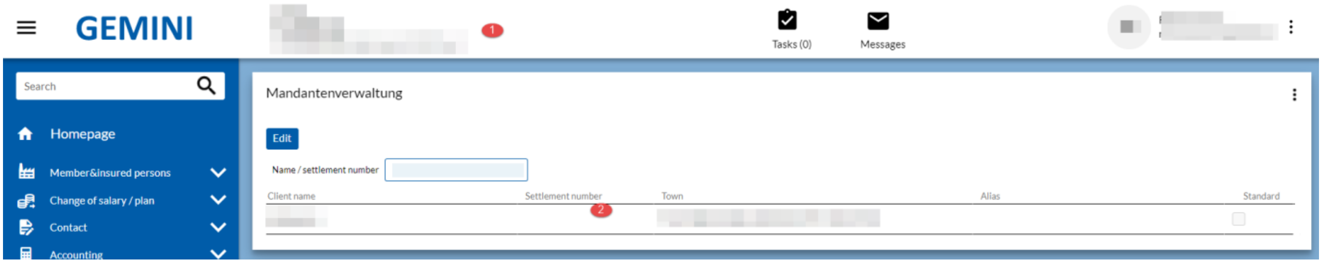
3.3 Change e-mail address

Click on “Change e-mail address” to enter a new e-mail address.



4 Client management

The client management section lists the user accounts to which you have access. The list is the same as the quick selection in the drop-down menu shown in the title bar. You can give the individual clients an alias, which will be displayed in the quick selection.



5 User management

Manage the Connect users under “User management”. To do this, you need to hold the Connect administrator rights.

5.1 Grant permissions

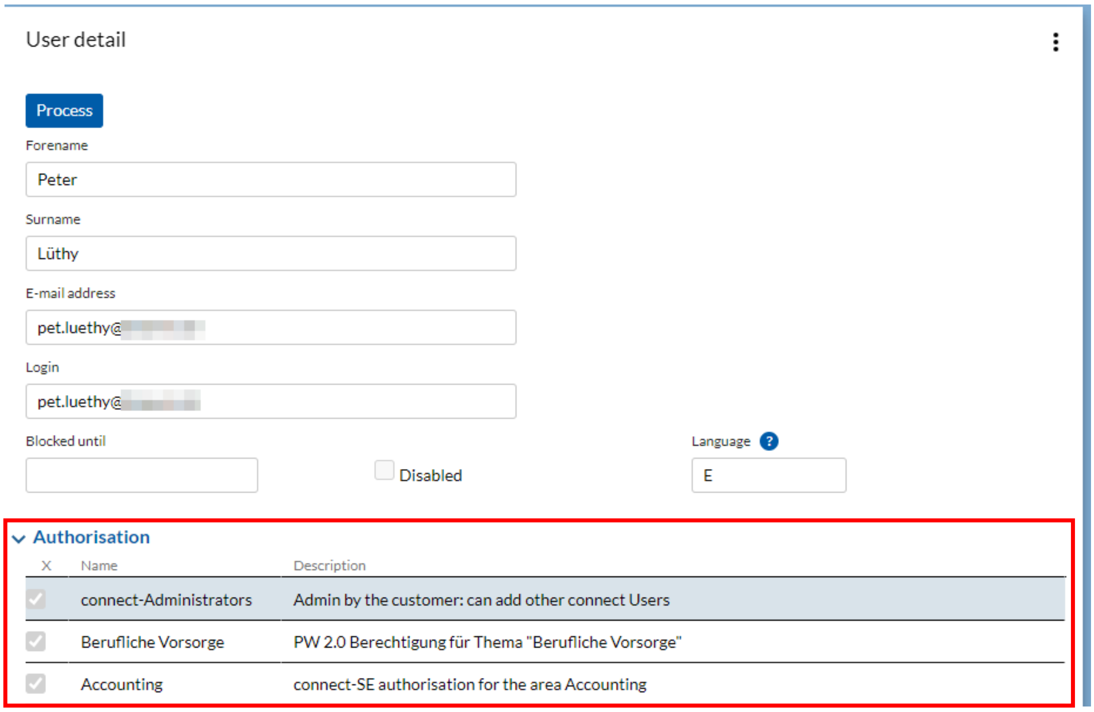
There is no read permission on Connect. Connect administrators have the right to grant the following authorisations to other users:

Connect administrators:
“Connect administrators” authorisation allows administrators to register, block and edit users. This user group has access to all menu items on the portal.

Pension scheme:
Users with “Pension scheme” authorisation don’t have access to the “Accounting” menu. All other menu items are visible.

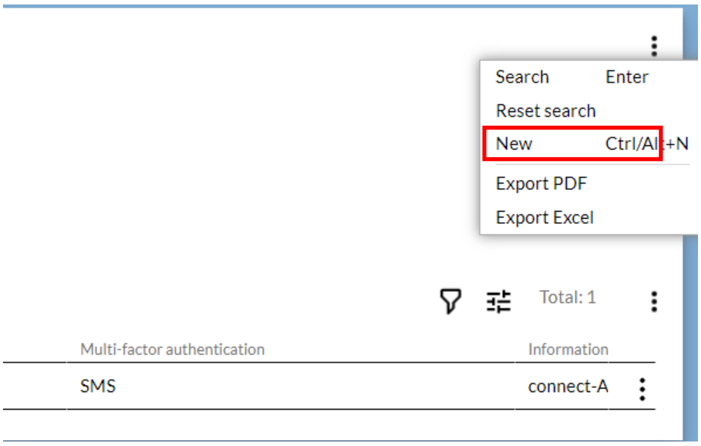
Accounting:
Users with “Accounting” authorisation only see the “Accounting” menu.

The “Pension scheme” and “Accounting” authorisations can be assigned in combination.



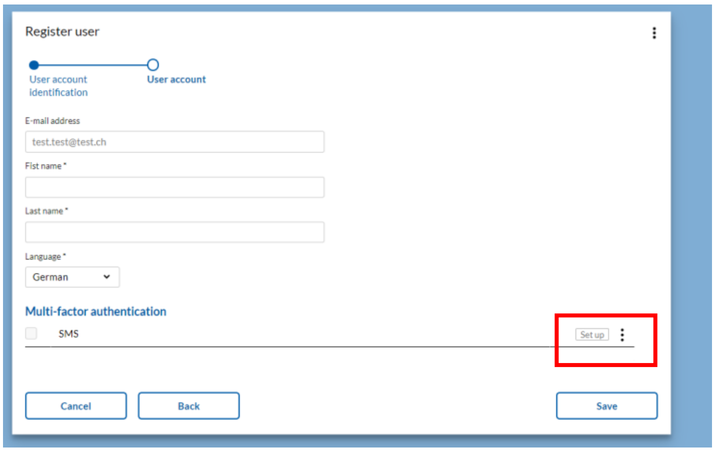
5.2 Enter new users

Click on “New” in the three-dot menu and enter the e-mail address of the new user. Click on “Continue” and complete the mandatory fields (forename, surname, language). The checkbox for the “Welcome e-mail” must be activated to ensure that newly registered users immediately receive an e-mail to guide them through the user name process.

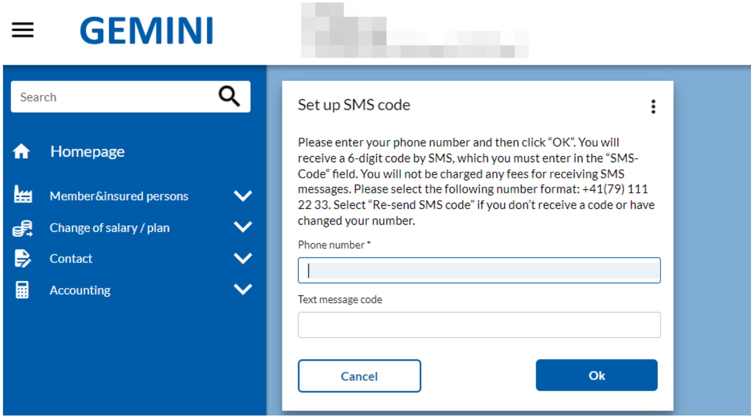


Multi-factor authentication

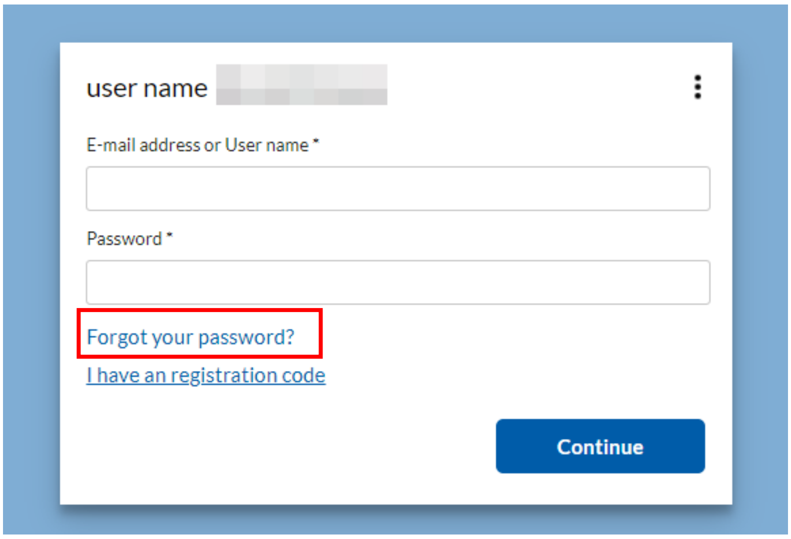
To complete the process, you will have to identify yourself via your mobile number. Click on “Set up” in the “Multi-factor authentication” section and enter your mobile number.



An SMS code will be sent to your mobile phone promptly. Enter the code in the "SMS code" field. Click on "Save" on the "Enter user" screen. The process is completed once you have entered your password.



The registered user will receive an e-mail informing them that they can now log in to Connect. Using the "Forgot password" function, new users can set their own password and log in to Connect.

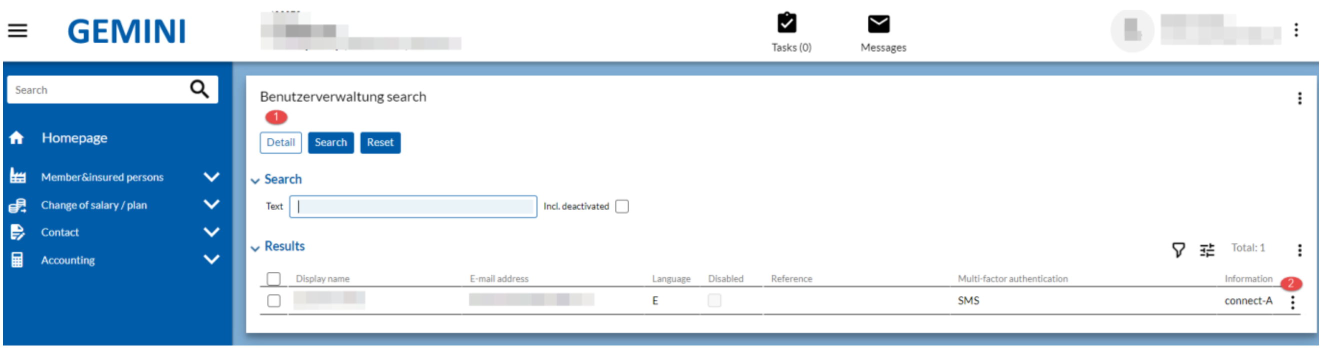


Access for brokers/trustees

If the employee benefits scheme is managed by an insurance broker, you can grant the broker access to your employer portal by following the procedure described above (see 5.1 Enter new users). You will need the forename, surname and e-mail address of your broker.

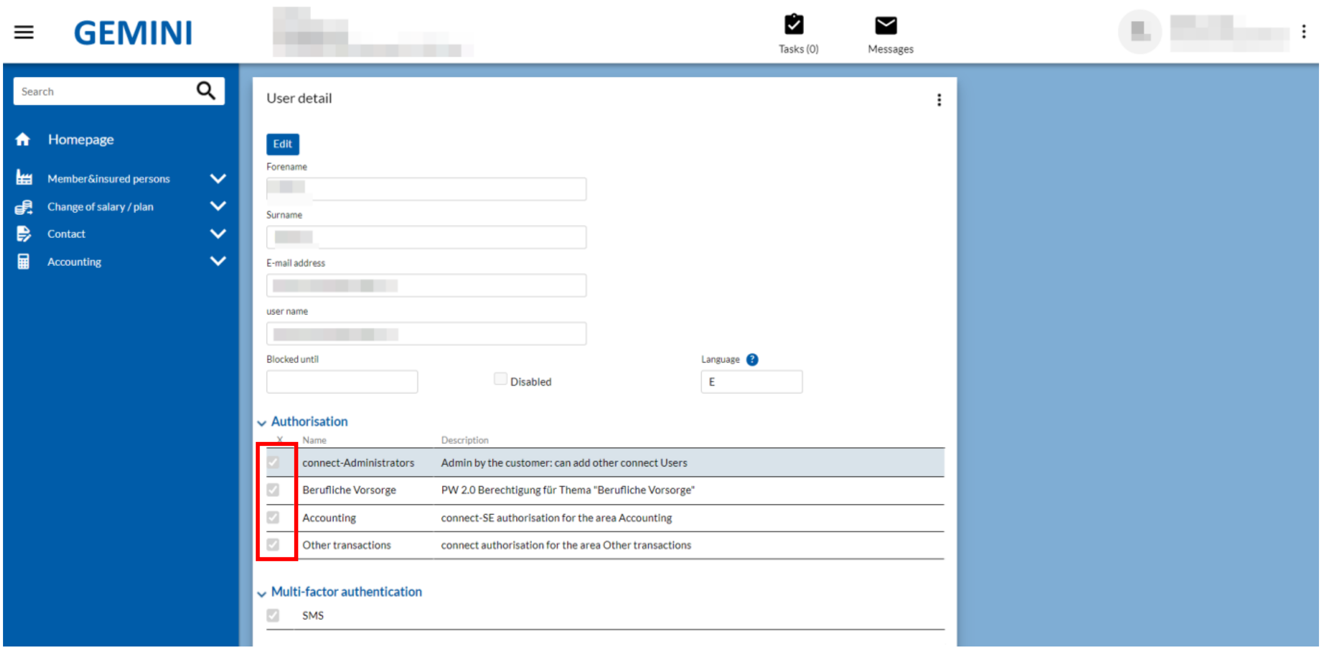
5.3 Edit user

Select the relevant user with a double click or via the "Detail" button.



Edit the forename, last name, e-mail address, user name, language or authorisations by clicking on "Edit".

Authorisations
The administrator can assign or revoke respective rights under "Authorisations" on the "User details" screen. Holders of the "Connect administrators" authorisation can register, block and edit users.



5.4 Block user

Select a specific user via a double click or via the “Detail” button and click on “Process”.