

GEMINI Collective Foundation

CONNECT FOR EMPLOYERS INSTRUCTIONS AUTHORISATION

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Contents

1	Purpose	3
2	Homepage and navigation.....	3
3	User profile.....	4
3.1	Edit: user name and language setting	4
3.2	Change password.....	5
3.3	Change e-mail address	5
4	Client management	6
5	User management.....	7
5.1	Grant permissions	7
5.2	Enter new users.....	8
5.3	Edit user	10
5.4	Block user.....	11

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.

The screenshot shows the 'User profile [Peter Lüthy]' page. At the top, there are three buttons: 'Process', 'Change password', and 'Change e-mail address', all highlighted with a red box. Below this is a profile card for Peter Lüthy with fields for Forename, Surname, E-mail address, and Language. Underneath, there are two sections: 'Multi-factor authentication' with a 'Process' button (highlighted in red) and 'Benutzereinstellungen' (User settings) with a 'Process' button (also highlighted in red). The 'Benutzereinstellungen' section includes a dropdown for 'Type of presentation of content pages' and a checked checkbox for 'Notification mails'.

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.

The screenshot shows the 'User profile' edit form. It features input fields for 'Display name', 'Forename', and 'Surname'. The 'E-mail address' is pre-filled with 'rahel.luescher@avadis.ch'. The 'Language' dropdown menu is highlighted with a red box and currently shows 'E'. At the bottom, there are 'Cancel' and 'Save' buttons.

3.2 Change password

Click "Change password" to create a new password.

The screenshot shows the GEMINI user interface. At the top left is a hamburger menu icon, followed by the GEMINI logo and a blurred profile picture. Below the logo is a search bar with a magnifying glass icon. A blue sidebar on the left contains navigation links: 'Homepage', 'Member&insured persons', 'Change of salary / plan', 'Contact', and 'Accounting'. The main content area is titled 'Change password'. It contains the following text: 'You can use this form to change your password. Upper/lower case letters are relevant. The password must: - at least 10 characters long. - contain at least 4 different character categories. Possible character categories are: Upper case letters, lower case letters, numerals, special characters.' Below this text are three input fields: 'Old password *' (filled with dots), 'New password *', and 'Repeat new password *'. At the bottom are 'Cancel' and 'Save' buttons.

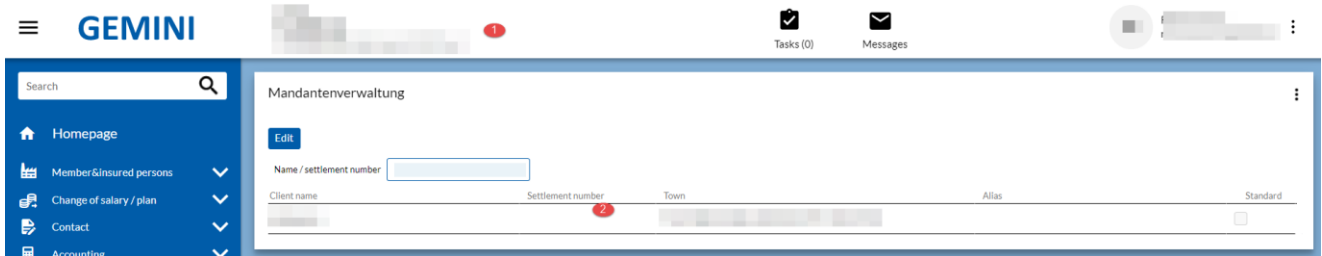
3.3 Change e-mail address

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

The screenshot shows the GEMINI user interface. At the top left is a hamburger menu icon, followed by the GEMINI logo and a blurred profile picture. Below the logo is a search bar with a magnifying glass icon. A blue sidebar on the left contains navigation links: 'Homepage', 'Member&insured persons', 'Change of salary / plan', 'Contact', and 'Accounting'. The main content area is titled 'E-Mail-Adresse ändern'. It contains the following text: 'Mit diesem Formular können Sie Ihre E-Mail-Adresse ändern. Geben Sie die neue E-Mail-Adresse ein und klicken Sie "OK".' Below this text is an input field labeled 'Neue E-Mail-Adresse *'. At the bottom are 'Back' and 'OK' buttons.

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.



The screenshot shows the GEMINI web application interface. At the top left is the GEMINI logo and a navigation menu icon. The top right contains a user profile icon with a notification badge (1), and icons for 'Tasks (0)' and 'Messages'. A search bar is located in the top left of the main content area. The main content area is titled 'Mandantenverwaltung' and features an 'Edit' button and a text input field for 'Name / settlement number'. Below this is a table with columns: 'Client name', 'Settlement number', 'Town', 'Alias', and 'Standard'. A red '2' badge is positioned above the 'Settlement number' column. A left-hand navigation sidebar contains the following items: 'Homepage', 'Member & insured persons', 'Change of salary / plan', 'Contact', and 'Accounting', each with a dropdown arrow.

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.

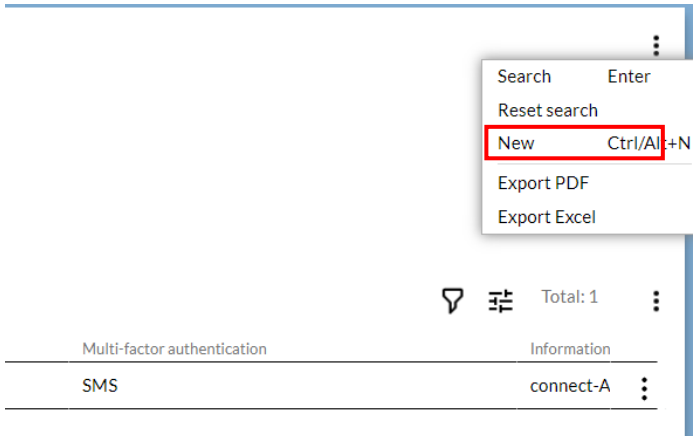
The "Pension scheme" and "Accounting" authorisations can be assigned in combination.

The screenshot shows the 'User detail' page for a user named Peter Lüthy. The user's email address is pet.luethy@... and their login is pet.luethy@... The user is not blocked until any date and is not disabled. The language is set to 'E'. Below the user information is a table of authorisations, which is highlighted with a red border. The table has three columns: 'X', 'Name', and 'Description'. The authorisations listed are 'connect-Administrators', 'Berufliche Vorsorge', and 'Accounting', all of which are checked in the 'X' column.

X	Name	Description
<input checked="" type="checkbox"/>	connect-Administrators	Admin by the customer: can add other connect Users
<input checked="" type="checkbox"/>	Berufliche Vorsorge	PW 2.0 Berechtigung für Thema "Berufliche Vorsorge"
<input checked="" type="checkbox"/>	Accounting	connect-SE authorisation for the area Accounting

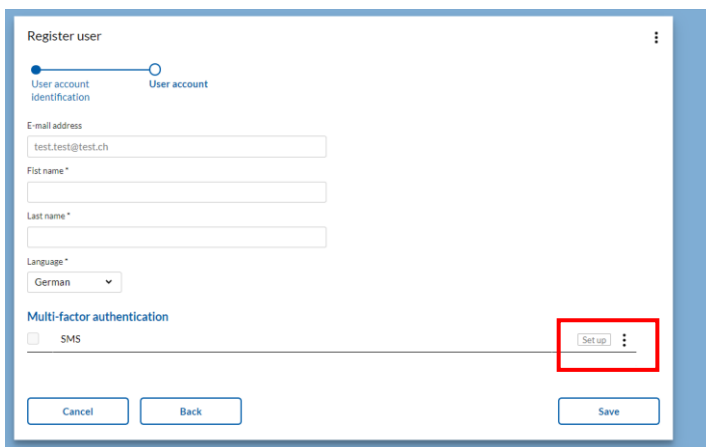
5.2 Enter new users

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.



The screenshot shows the 'Register user' form. It has a progress indicator at the top with two steps: 'User account identification' (completed) and 'User account'. The form contains several input fields: 'E-mail address' (test.test@test.ch), 'First name *', 'Last name *', and 'Language *' (German). Below these fields is the 'Multi-factor authentication' section, which includes a checkbox for 'SMS' and a 'Set up' button (highlighted with a red box). At the bottom of the form are 'Cancel', 'Back', and 'Save' buttons.

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.

Search

☰ GEMINI

Search

Homepage

Member&insured persons

Change of salary / plan

Contact

Accounting

Set up SMS code

Please enter your phone number and then click "OK". You will receive a 6-digit code by SMS, which you must enter in the "SMS-Code" field. You will not be charged any fees for receiving SMS messages. Please select the following number format: +41(79) 111 22 33. Select "Re-send SMS code" if you don't receive a code or have changed your number.

Phone number *

Text message code

Cancel Ok

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.

user name

E-mail address or User name *

Password *

Forgot your password?

[I have an registration code](#)

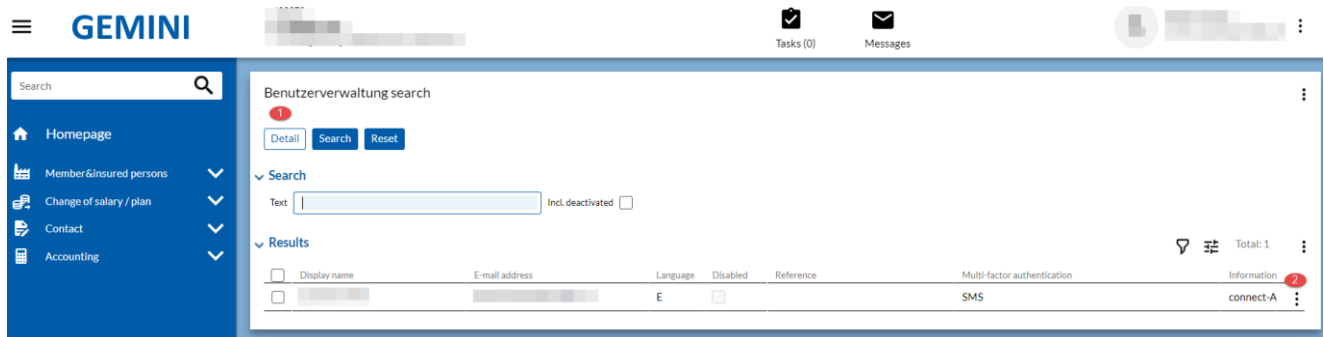
Continue

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

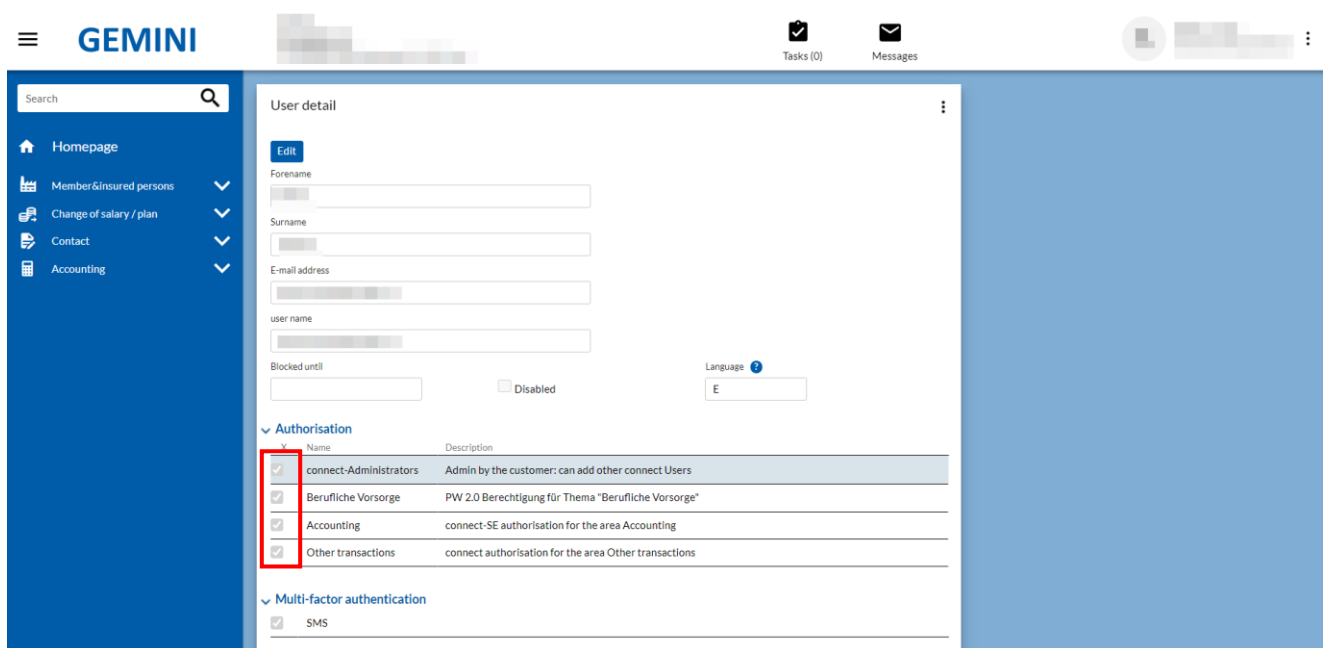
Select the relevant user with a double click or via the "Detail" button.



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".

User detail

Edit

Forename

Surname

E-mail address

user name

Blocked until Disabled Language

Authorisation

X	Name	Description
<input checked="" type="checkbox"/>	connect-Administrators	Admin by the customer: can add other connect Users
<input checked="" type="checkbox"/>	Berufliche Vorsorge	PW 2.0 Berechtigung für Thema "Berufliche Vorsorge"
<input checked="" type="checkbox"/>	Accounting	connect-SE authorisation for the area Accounting
<input checked="" type="checkbox"/>	Other transactions	connect authorisation for the area Other transactions