



HANSARD

User Guide



Online Accounts User Guide

A client guide to Hansard's Online Portal

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Registering for your online client portal

ACTIVATION

We recently sent an invitation to re-register for our new online portal to the email address we have on file for you. If you have changed your email address, please contact our office on +44 1624 688 000, or email us at clientservicesupport@hansard.com. This will allow us to update our records and send you a new invitation.

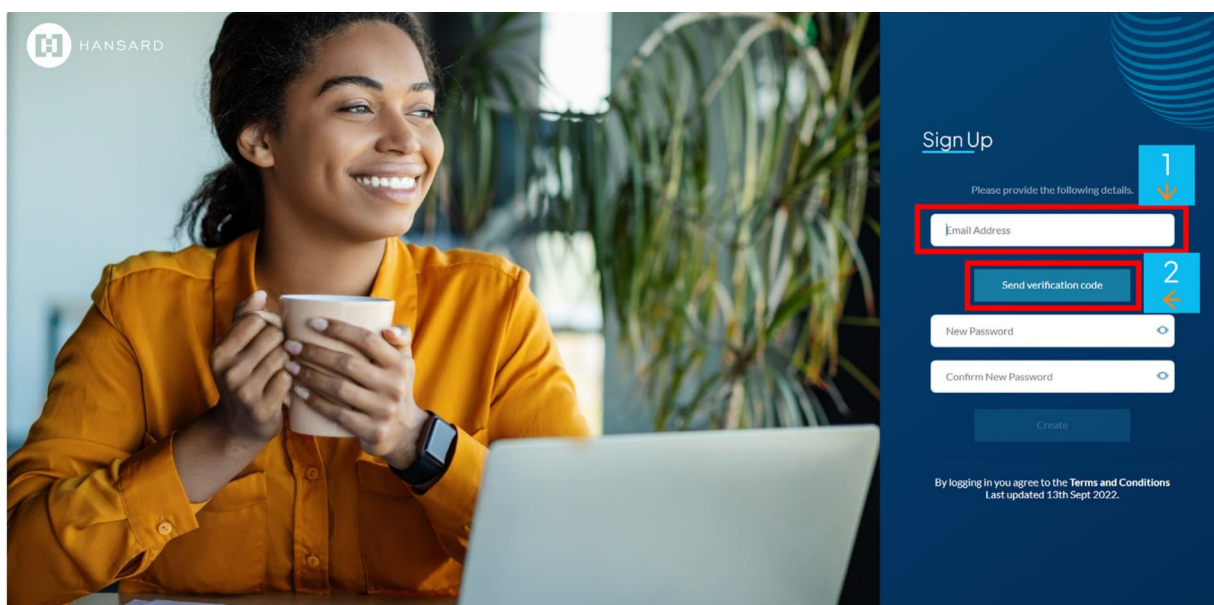
If your email address remains the same and you haven't seen the invitation, please search your mailbox, including all folders, for an email from notifications@hansard.com. It may have been filtered to your Junk/Spam folder.

Once you locate the email, click the link to re-register. If the link does not work, mark the email as 'Not Junk' and try clicking the link again to activate it.

HOW TO REGISTER

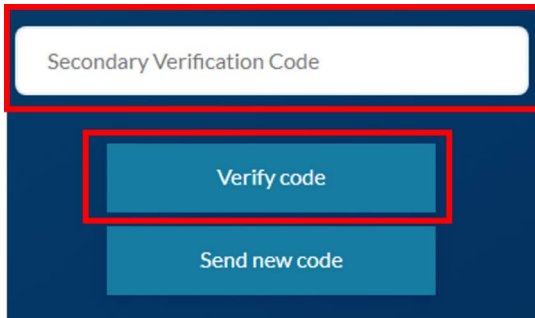
The link within your email will automatically direct you to the Hansard Client Portal registration page, as shown below. To ensure the registration process is fully complete, please follow the steps below:

1 Within the 'email address' field on the sign up screen, enter the email address that the invitation was sent to. If you wish to use a different email address, you will need to contact our Client Services Support Team who will issue a new invite with a new link for you to use. ↓



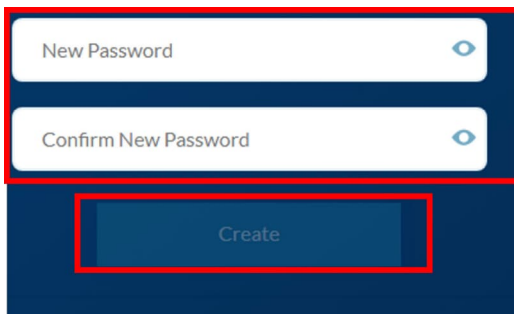
↑ **2** Select the 'Send Verification Code' button. This will generate a further email to your email address which contains a 6-digit code.

Locate this email from notifications@hansard.com and enter the code into the 'Secondary Verification Code' field shown below, and click 'Verify Code'. ↓



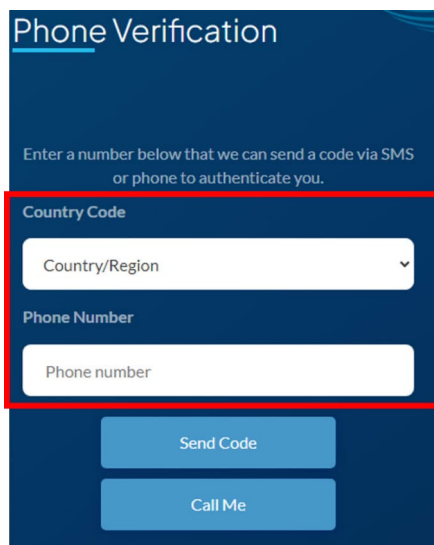
A screenshot of a dark blue form. At the top is a white input field labeled "Secondary Verification Code". Below it is a blue button labeled "Verify code". At the bottom is another blue button labeled "Send new code". Red boxes highlight the input field and the "Verify code" button.

↓ Once verified, you will be able to enter a password of your choice. Ensure this password is kept safe as you will need it to log in to the portal in future. Once you have chosen your password and confirmed it, press 'Create'.



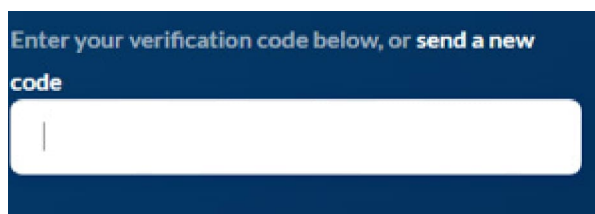
A screenshot of a dark blue form. It has two white input fields: "New Password" and "Confirm New Password", each with an eye icon on the right. Below the fields is a blue button labeled "Create". Red boxes highlight the two input fields and the "Create" button.

Hansard takes takes the security of your data seriously. In line with latest security protocols we use two factor authentication. You will be asked to enter your country code and mobile telephone number to support this, and we will issue a One Time Passcode to this number when requested. ↓



A screenshot of a dark blue form titled "Phone Verification". Below the title is the text "Enter a number below that we can send a code via SMS or phone to authenticate you.". There are two input fields: "Country Code" with a dropdown menu showing "Country/Region" and "Phone Number" with a text input field. Below these fields are two blue buttons: "Send Code" and "Call Me". Red boxes highlight the "Country Code" dropdown and the "Phone Number" input field.

You can then decide if you would like to receive an SMS message with your one-time code or receive an automated telephone call. Select your preferred option and the following box will appear. Enter the one-time code in this box. ↓



Enter your verification code below, or [send a new code](#)

This completes the registration process and you will be automatically re-directed to the Hansard Client Portal Landing page where you can login.

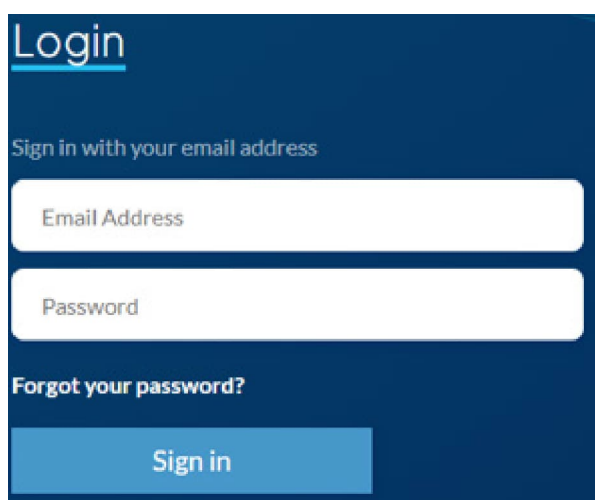
Logging in

For the best user experience, it is recommended that you access the Client Online Portal via the www.hansard.com homepage.

Within the top right corner of the website's homescreen, select the orange 'Policyholder Login' button. →



Using the email address and password that you used to register for the portal, enter these details in the relevant fields and click 'Sign in'. ↓



Login

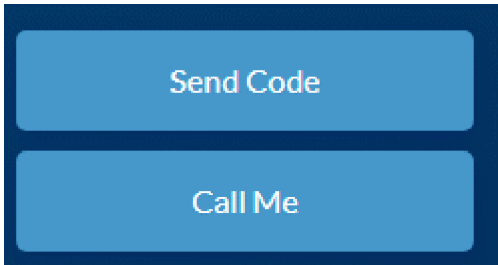
Sign in with your email address

[Forgot your password?](#)

[Sign in](#)

PHONE VERIFICATION

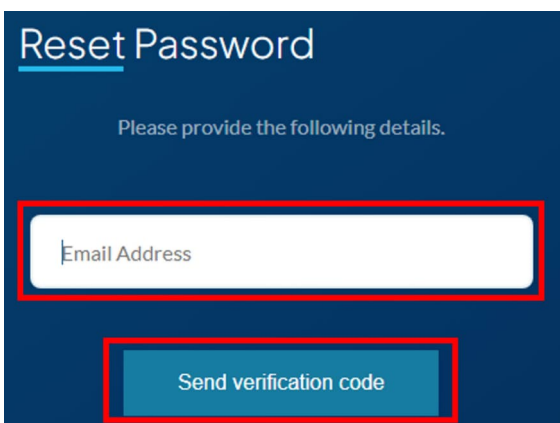
You will be directed to a phone verification screen. As you set up two-factor authentication, you will be asked to enter a 6 digit code to verify your login. On this screen, you will see the last 5 digits of your registered telephone number. Select whether you would like your code to be sent via SMS message or automated telephone call. ↓



TROUBLESHOOTING

If you are having issues logging in, there are steps that can be taken to try and rectify the problem:

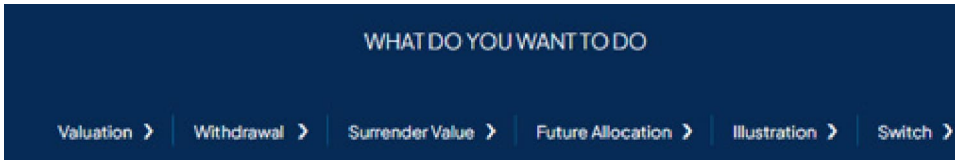
- Ensure the initial registration link is not being used to sign in. The portal should be accessed via www.hansard.com by selecting the 'Policyholder Login' in the top right of the main page.
- Ensure the email address you are using is the email address we hold on file and that you registered on the Portal with.
- Try an alternative browser such as Microsoft Edge or Google Chrome.
- If the system logs you off immediately after entering the code, rather than returning to the home page, click the 'back' button and generate another code.
- If you have misplaced your password details, click 'Forgot your password' from the login screen, located under the login details fields. You will then be prompted to enter your email address and send a new verification code. ↓



ID & Address verification

ACCESSING PAYMENTS & EDITING YOUR CONTRIBUTIONS

To ensure key functionality is available, navigate to your toolbar labelled 'What do you want to do'. ↓



If all of the options noted above are not available to you, it is likely to be because your identification and address verification requires attention.

It is essential to have the following items in place on the system for a fully functional toolbar, as they are crucial for managing your policy online.

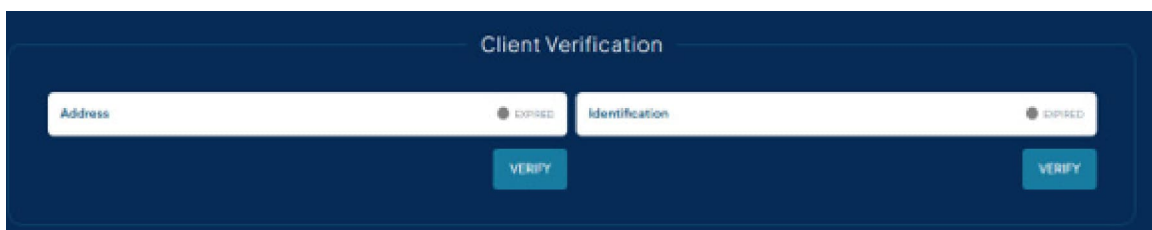
Verified identification and verified address →	Access to 'Edit Contribution'
Updated bank details, identification & verification of address →	Access to 'Withdrawal'

IDENTIFICATION AND ADDRESS VERIFICATION

To check if the above is in place, follow the below steps:

Within the 'Client Overview' screen, you will notice that both 'Address' and 'Identification' are marked grey indicating that they are not valid. A 'Verify' button will display beneath the documents that require attention. By clicking 'Verify', you will have the option to upload your new, certified document(s).

Please be aware that these fields will not automatically turn green once you have uploaded your documents as approval from Hansard is still required. This typically takes up to 5 working days. ↓



Once Hansard has approved your documentation, the above fields will be marked green, confirming that the identification and address verification we hold on file for you is in date and verified.

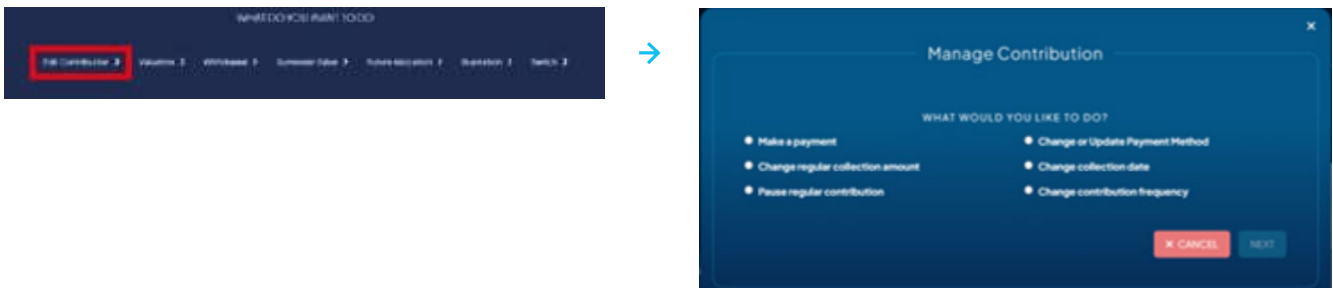
You will now have full access to the 'What do you want to do' toolbar and be able to request withdrawals and amend your contributions.

Please note that depending on the type of product you hold, the options available within this toolbar may vary.

What do you want to do functionality

EDIT CONTRIBUTION

You can use the 'Edit Contribution' feature for managing all aspects of your contributions. This includes making missed payments, reducing payments, taking a premium pause (holiday), and updating your card details. No forms are needed for these actions, but please ensure the ID and address verification are valid to access the 'Edit Contribution' button. Otherwise, this function will not appear in the toolbar.

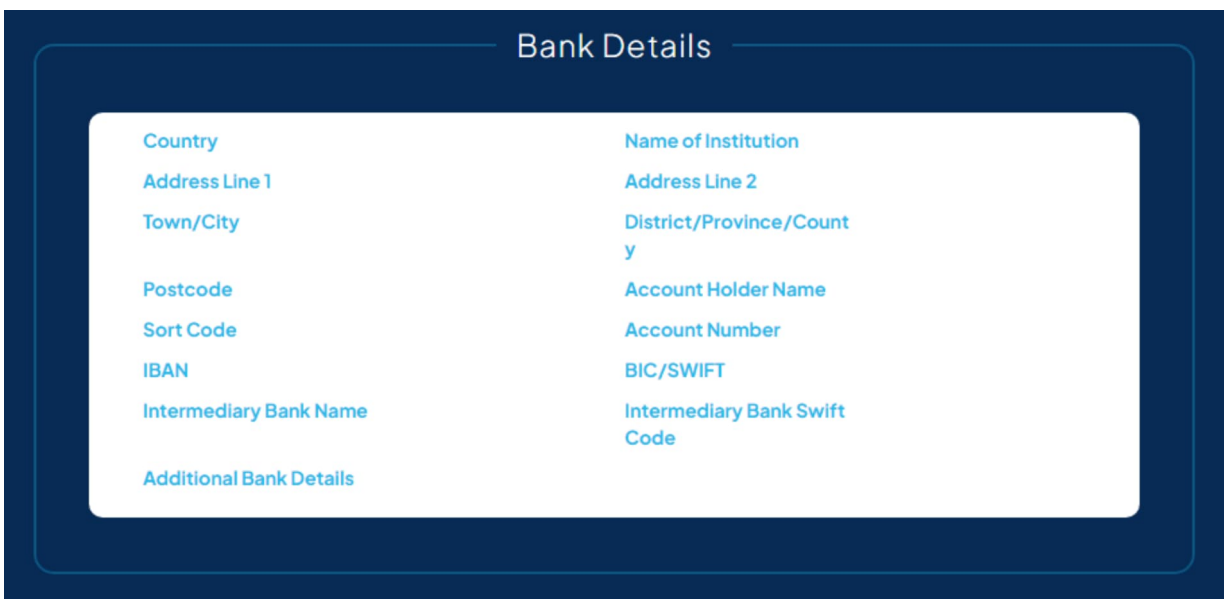


VALUATION REQUEST

Within the 'What do you want to do' toolbar, select 'Valuation'. Once selected, the most recent valuation will appear that you can export and save as a PDF document.

BANK DETAILS

To ensure seamless processing of key actions, please make sure that your bank details are accurately stored on the portal and that your identification and address verification are up to date. You can verify this information by navigating to the "Bank Details" section on your Client Site, which will display the bank details we have on record for you.



Contract functionality

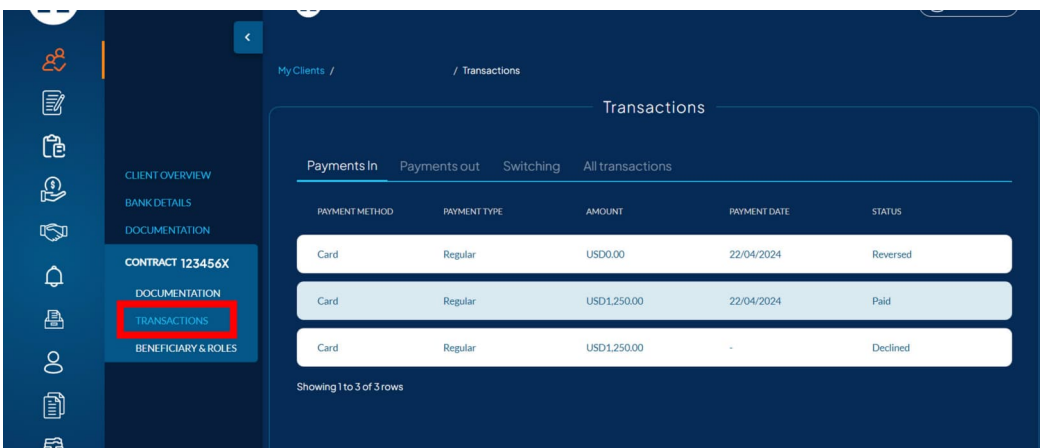
HISTORICAL CLIENT INFORMATION - PRE-MIGRATION (BEFORE 01 MARCH 2024)

If you want to review unit allocation statements or premium history before the migration to the new system, you can find this in **1** 'Contract' > 'Documentation' under **2** 'Statement Output'. ↓



TRANSACTIONS (FROM 01 MARCH 2024)

To find recent premium history, and other transactions that have taken place post migration to our new system, go to 'Contract' > 'Transactions'. ↓



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