

Employer portal authorisation form

Name of employer

Group code

Please fill in this form in the fields provided. Use the tab key to move from one field to the next.

The employer portal enables the employer to control who has access to the scheme and pay points on the employer portal, add new members, transfer members between pay points, inform Momentum when members leave, update member data and contributions, access certain statements and reports and provide Momentum with the necessary automatic fund transfer instruction each month.

Section 1: Employer portal super-user

The designated signatory of the employer will be granted super-user level of access on the employer portal and is authorised to assign the level of access that each additional employer portal user will have, indicate which pay point the user must have access to, and indicate when a user's access to the employer portal must be removed. The super-user is also required to notify Momentum of any changes to the pay point details, including contact details and the bank account used for the purpose of contribution and premium collections.

The employer portal super-user appointed in terms of this form is required to use the facility available on the employer portal to perform the following functions, in accordance with the document *Terms and conditions for employer portal usage*:

- Assign access to additional employer portal users. This includes authorisation of additional users to either view or change information, load claims and confirm the contributions and premiums for each month, and/or assign a 2nd Authoriser for the purpose of claim submissions and payment of the contributions and premiums. The super-user must also ensure that each new user reads and understands the document *Terms and conditions for employer portal usage*.
- Remove access for users who are no longer authorised to access the scheme or a pay point on the employer portal.
- Manage each pay point. The super-user must specify a contact person for each pay point, which will be loaded as the pay point contact on Momentum's records. Momentum will thereafter send reminders and communication to this person each month regarding the contributions and premium payments. The email address provided for this purpose must be secure as confidential information will be sent to the address. Reminders will also be sent to the pay point contact person via email if no authorised user has confirmed the contributions on the employer portal in respect of the monthly reconciliation process by the reminder date (5 days before the agreed contribution payment date).

If there is no employer portal user with "view and change" level of access on a pay point, the super-user will be required to update the member records and confirm the contributions monthly before the agreed payment date.

Super-user: Title, first name and surname

Super-user: ID number

Super-user: Email address

Super-user: Cellphone number Office number

Instruction: Give / remove super-user level of access Give access Remove access

Section 2: Signed on behalf of the employer

An employer may not authorise a Momentum employee to have employer portal access to a scheme or a pay point of a scheme unless this Momentum employee is also the broker (financial adviser) appointed for that scheme.

Each authorised employer portal user is responsible for providing correct information and instructions when conducting transactions via the employer portal and is required to hold all information viewed on the website as confidential. All transactions and changes will automatically be updated after submission. The authorised user must therefore ensure that all information and instructions are correct before submission. Momentum will try to assist if notified of an incorrect instruction submitted, but will not be held responsible for any loss or damage caused by the error.

Before signing this form, the employer must read the document *Terms and conditions for employer portal usage*, as well as any general rules, special rules and policies that pertain to the scheme. **Only the managing director or financial director of the employer, or the designated signatory of the employer may sign this form.**

Name

Designation

Signature

Date - - 2 0 Y Y

Fax the completed form to 012 675 3970 or email to clientcontactcentre@momentum.co.za.

When you sign this form by inserting a digital signature it confirms that the information provided is true and correct. Options to sign the form:

1. Print out the form, sign and scan it and send it back via email to clientcontactcentre@momentum.co.za or fax it to +27 (0)12 675 3970.
2. Place your scanned signature in the signature block.
 - Store your scanned signature in a safe place on your computer.
 - Select the 'comments' tab from your menu in Adobe.
 - Select the 'add stamp' icon.
 - Select custom stamps.
 - Create custom stamps.
 - You can now browse and upload your signature to save it as a custom stamp under 'sign here' in Adobe.
 - You can now go back to your 'stamps' icon and select 'sign here' and select your saved signature.
 - Place it in the document and save the document.

When you want to print the form to complete by hand you can turn off the field highlights by selecting the "highlight existing fields" on the top right hand corner of your screen.