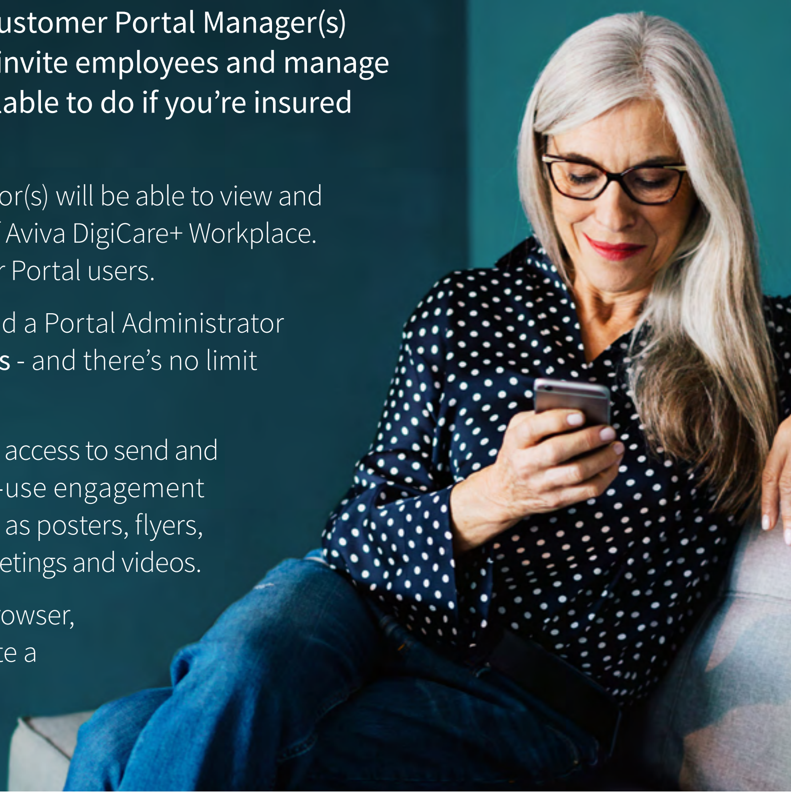
Aviva DigiCare+ Workplace

User Guide for the Customer Portal

Provided by SQUAREHEALTH ALWAYS THERE HEALTHCARE

Introduction to the **Customer Portal**



The Customer Portal allows multiple allocated Customer Portal Manager(s) (CPM) and/or Portal Administrator(s) to add and invite employees and manage and/or maintain their information - which is available to do if you're insured under one of Aviva's Group Protection policies.

Your Customer Portal Manager(s) or Portal Administrator(s) will be able to view and edit account information and add and maintain users of Aviva DigiCare+ Workplace. The user can also check the Activity Log for all Customer Portal users.

The difference between a Customer Portal Manager and a Portal Administrator is that **the CPM has the ability to add new Portal users** - and there's no limit to how many they can add.

Not only that, but the Customer Portal also gives the user access to send and resend invitation emails, alongside providing easy-to-use engagement materials to promote usage with your employees. Such as posters, flyers, brochures, intranet copy, information sheets for team meetings and videos.

The Customer Portal needs to be accessed through a browser, so basic hardware requirements that can accommodate a browser are required.

Contents

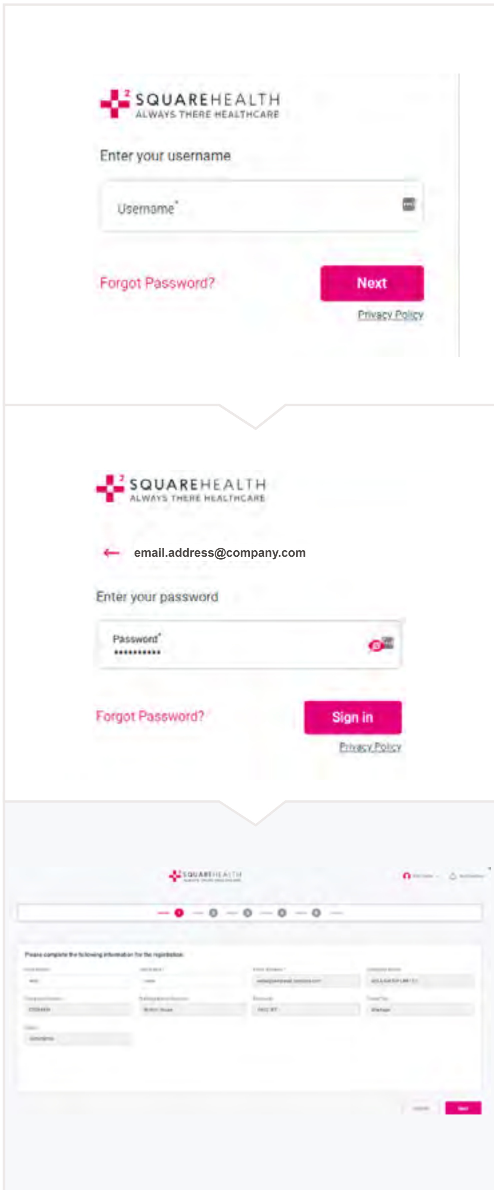
1

Customer Portal Registration

1. You must verify the email using the verification link received in your email. Your verification link will expire in 24-hours.
2. Should your verification link expire you should follow the '**Forgot Password?**' process.
3. On successful verification, a temporary password will be sent to you as a separate email.
4. Click on the link to **https://www.squarehealth.com/** and enter this temporary password, you'll then be redirected to the '**Change Password**' page.

When logging in for the first time you'll be shown the Terms and Conditions and Privacy Policy, once you've accepted these you'll be taken through a registration wizard. This will help walk you through the initial steps for registration, as well as your first upload of employees. The employee upload can be skipped when you're the registration wizard.

The terms and conditions will pop up. To accept them, enable/click the check box and then select '**Continue**'. You will then be taken to the **Step 1 of the registration wizard**.



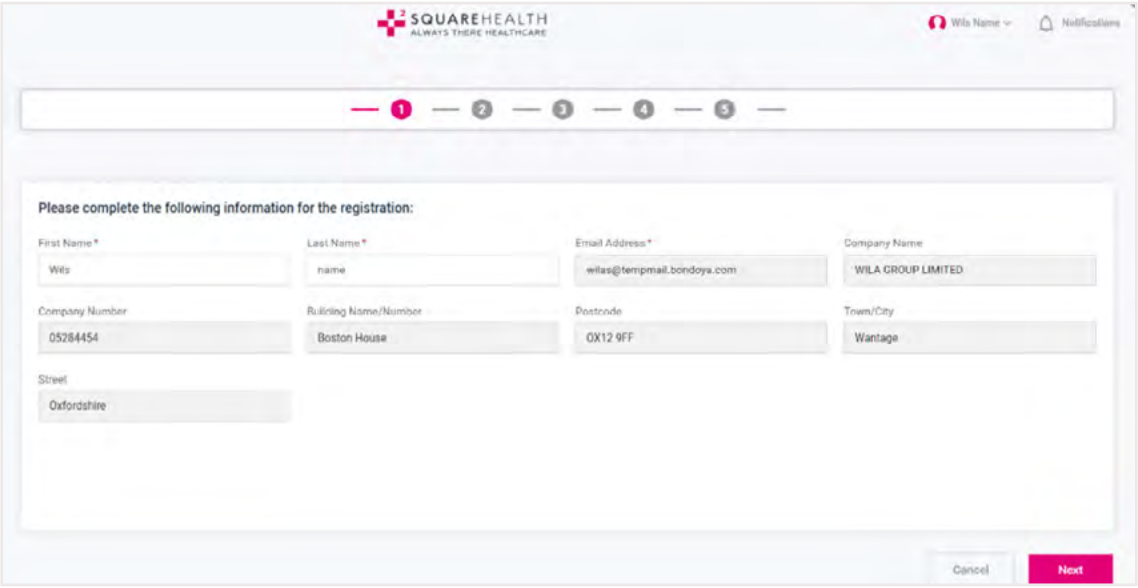
Please note, Customer Portal Registration needs to be completed **before** accessing the Customer Portal and is a one-time process.

Step 1

Provide and confirm details

You'll be provided with details which will have already been completed by Aviva as part of your registration.

You'll need to check that all your details are correct. You can change your name here yourself, but if any other information is incorrect, **please email us at digicare@aviva.com**.

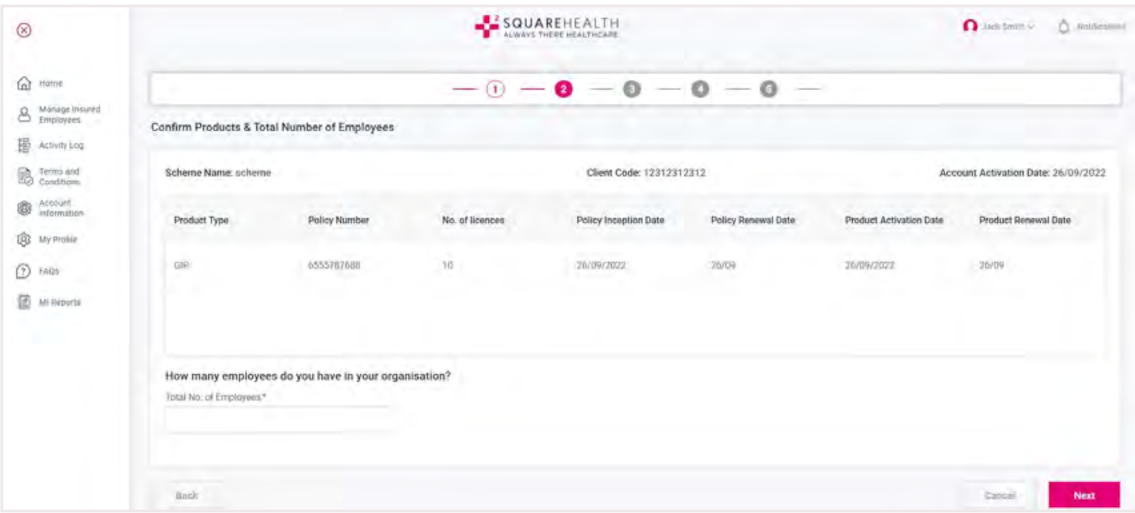


Step 2

Confirm products and total number of insured employees

You'll be provided with product and eligible insured employee numbers, which will have already been completed by Aviva. You'll need to complete your total number of employees to continue.

If you've already set and agreed an activation date with your Financial Adviser or Aviva and that date has passed when you load your employee data file, this will automatically trigger the first launch email to be sent that day.



If the employee data is not yet available this section can be skipped and you can go to Case 2.

Step 3

Upload your employee data

Case 1

If you have your employee information available now, you can upload this data right away.

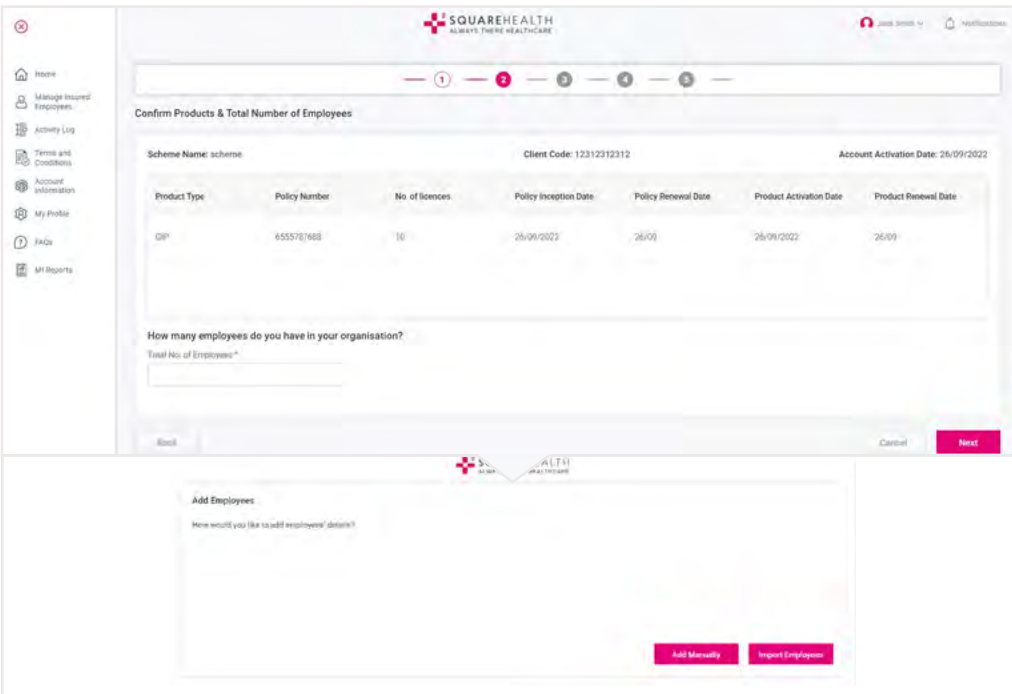
Important – If you've already set and agreed an activation date with your Financial Adviser or Aviva and that date has passed when you load your employee data file, this will automatically trigger the first launch email to be sent that day.

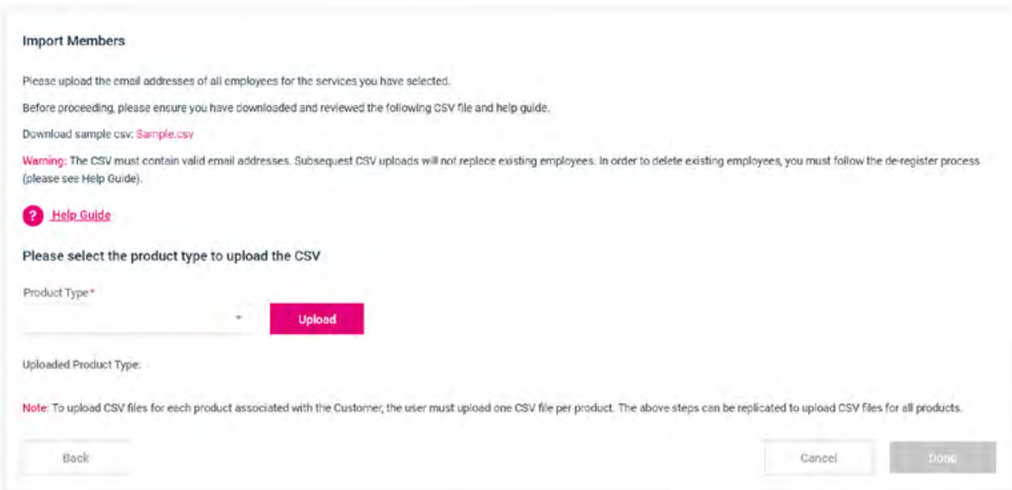
If you're yet to reach your set activation date, you can load your employee data, which will mean your invitation emails will automatically send on your chosen day of launch.

If you're unsure of your activation date, you can check this under 'Account Information' within the Product Details Tab. Please go to the 'Account Information' section in this guide for further details.

You'll need to upload a CSV (Comma Separated Values) spreadsheet for the employees of each of your different product types.

A help document and example CSV spreadsheet are available in Step 3 of the registration wizard, as shown below. Please ensure you follow this template to prevent any problems when uploading your employee data.

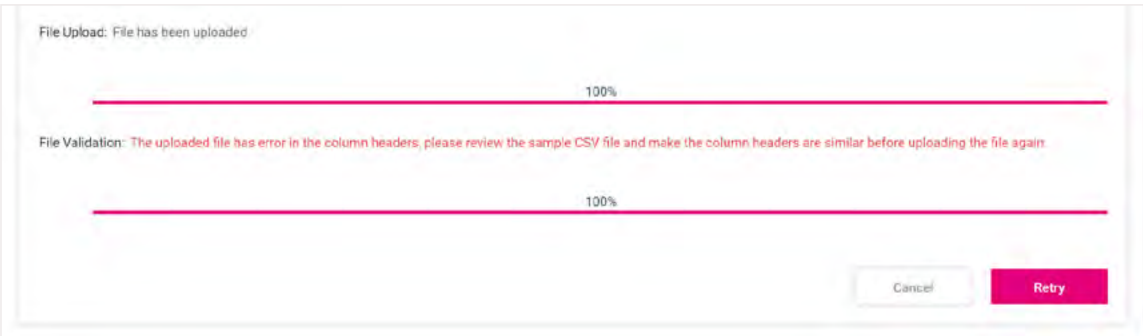




When uploading your CSV spreadsheet, your data will be checked for any common errors.

If there are any errors, you'll be notified and you'll be able to view a file which will show you where the errors in your data are.

After validating your CSV upload file, if there are any errors this screen will appear to show you there's been a failed upload. You can check where the failed upload occurred within the 'Activity Log'.



If there are any errors, you can amend these, re-upload the file and retry. Please don't amend the column headers from the CSV as this can cause further errors.

Please note, the employee reference number is not mandatory to the CSV.

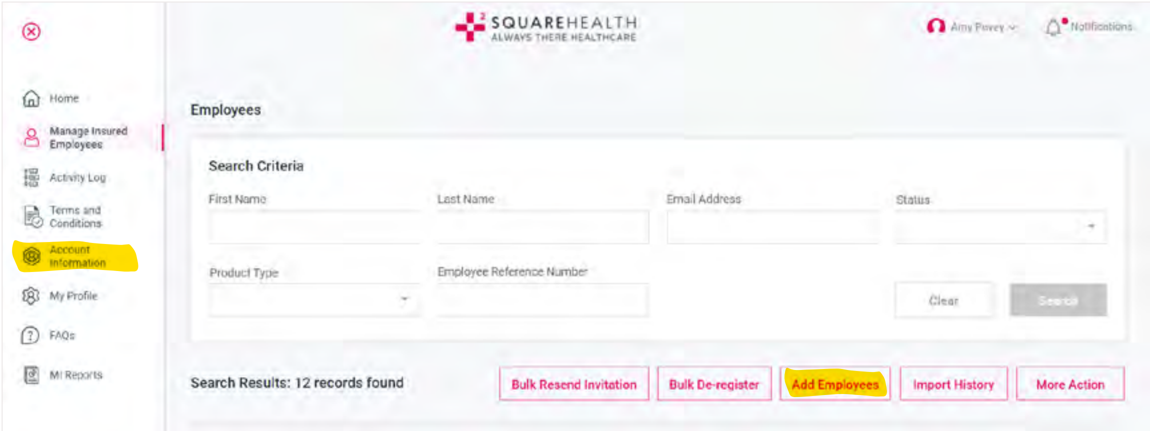
The primary Portal Manager will receive updates at each point of import so they will be aware of the history.

If the data is OK, you can upload an additional CSV spreadsheet for any other products you have, or continue on to the next step.

Case 2

You don't have your member data right now and want to skip this step

It's OK if you don't have your employee information available right now. You can continue to register your account and complete this step later by clicking the "Skip" button. **This will take you to Step 4**.

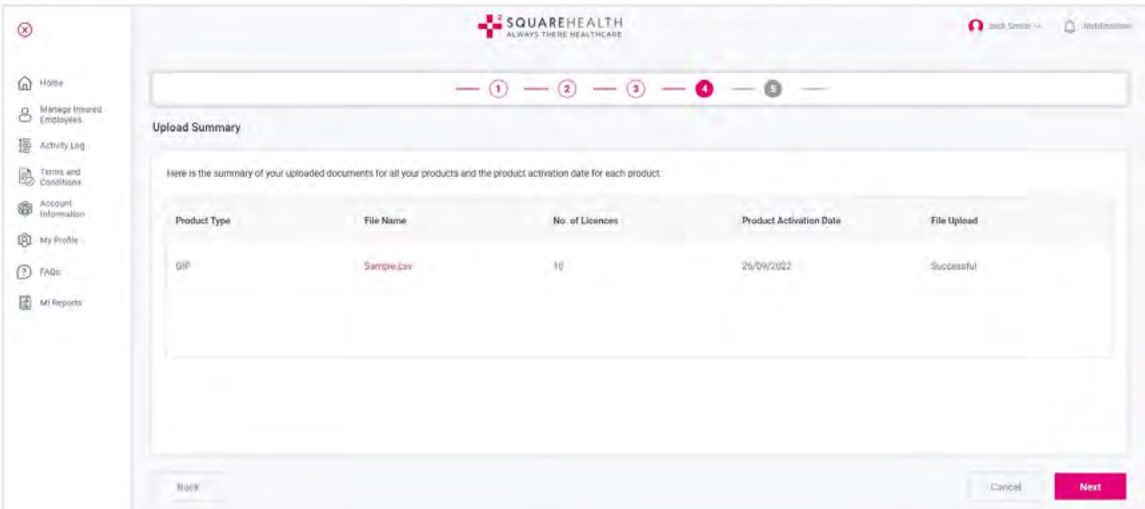


Step 4

Confirm upload of your members

A summary of your uploads will be presented here, confirming the names of any files you've uploaded, and any products you might have skipped.

You'll also be reminded of the activation dates of your products. This is the earliest date that the members you add will receive their invitation emails to download and use the Aviva DigiCare+ Workplace app.

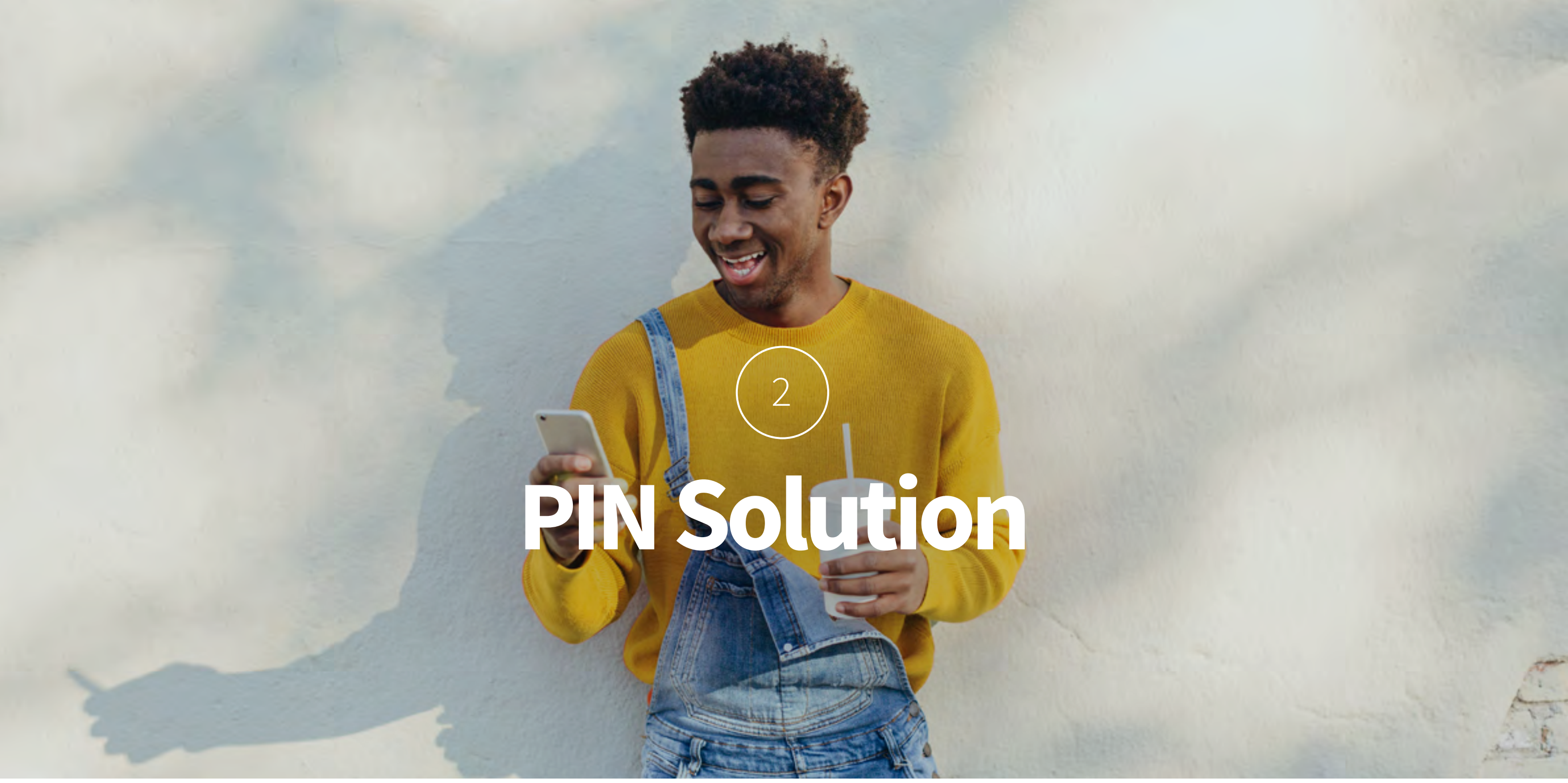


Step 5

Completion

You're all done! And your account is set up. Click 'Finish' here to explore the rest of the Customer Portal.

If you have skipped Step 3, you should ensure you go back and complete it before the member upload. If you fail do this, the customer upload will not send.



2

PIN Solution

Customer Portal Manager PIN for existing and new customers

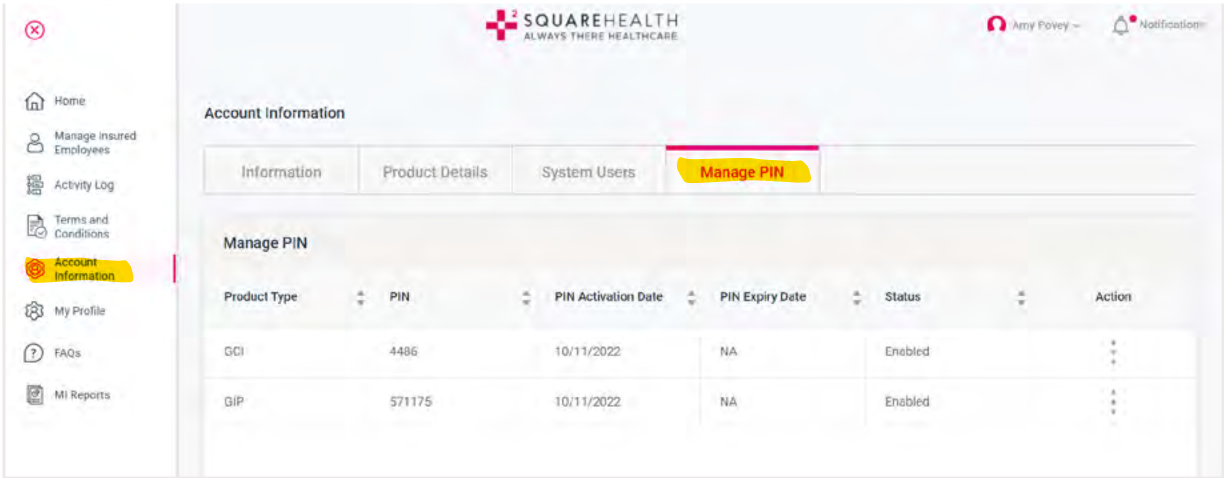
The PIN registration solution will replace Step 3 in the above registration process. There's no need to upload your employees through the CSV process as you're providing them with a PIN instead.

Once a PIN has been generated by Aviva, you'll be able to manage from the Customer Portal.

Please note, if you've selected to use a PIN expiry date you'll need to email **digicare@aviva.com** to request a new PIN.

Under '**Account Information**' there's a '**Manage PIN**' tab, - if you've been registered with a PIN by Aviva, then you'll be able to manage the PIN from here.

As a Customer Portal Manager, the '**Manage PIN**' function allows you to enable or disable your PIN and view or download your PIN or QR code.



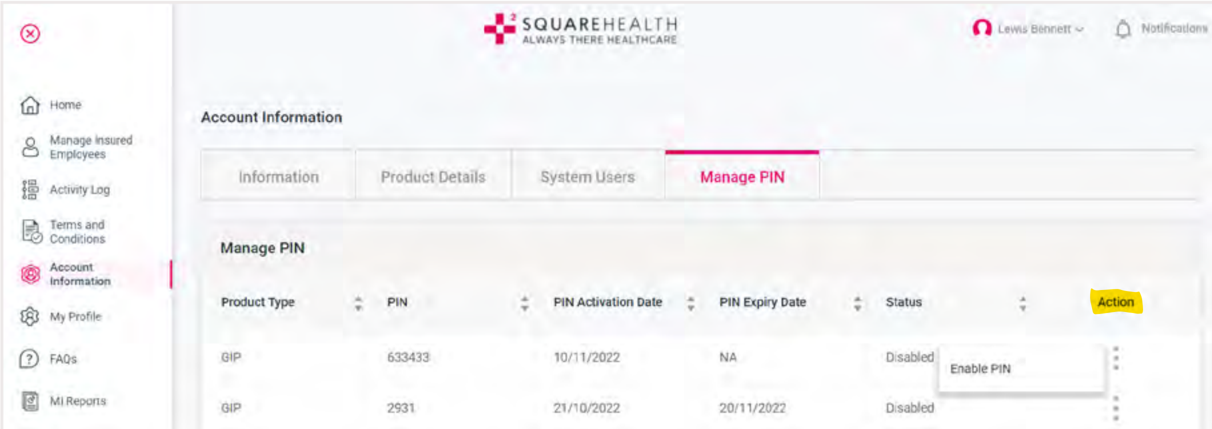
You can view your PINs and download the QR codes, which can be shared with your employees via your internal communication channels.

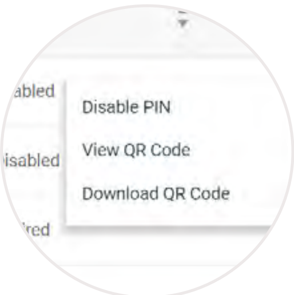
In addition, here's an **Aviva Flyer** which can be shared with your employees. This details the step-by-step process they should follow to register for Aviva DigiCare+ Workplace via the app using the PIN process. You'll just need to add the PIN to the bottom of the second page of the flyer before sharing with your employees.

Important Information - employees will need to have downloaded the Aviva DigiCare+ Workplace app from the **App Store** or **Google Play** to register using the PIN.

From the '**Action**' column**,** click on the 3 dots next to the most relevant PIN to see the available actions.

As a Portal Manager, you'll be able to '**Disable**' and '**Enable**' your PIN(s) and '**Download**' and '**View**' your QR code(s).





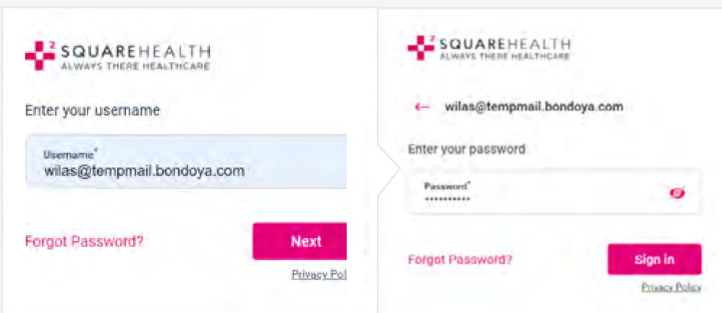
- **Disable PIN** - this will disable the use of the PIN (**please note**, this will not revoke access from anyone who has used the PIN to register). If the PIN is disabled by mistake, an action to enable the PIN will appear, which provides the option to reactivate it.
- **View QR Code** – you can view the QR code.
- **Download QR Code** – download the QR code to add to materials and share with your employees.

3

Log in to the Customer Portal

To log in to the Customer Portal:

1. Open any of the supported web browsers (see appendix for a list of supported web browsers).
2. Type **https://www.squarehealth.com/** in the address bar. The log in pages appear as shown:



4

Forgotten Password

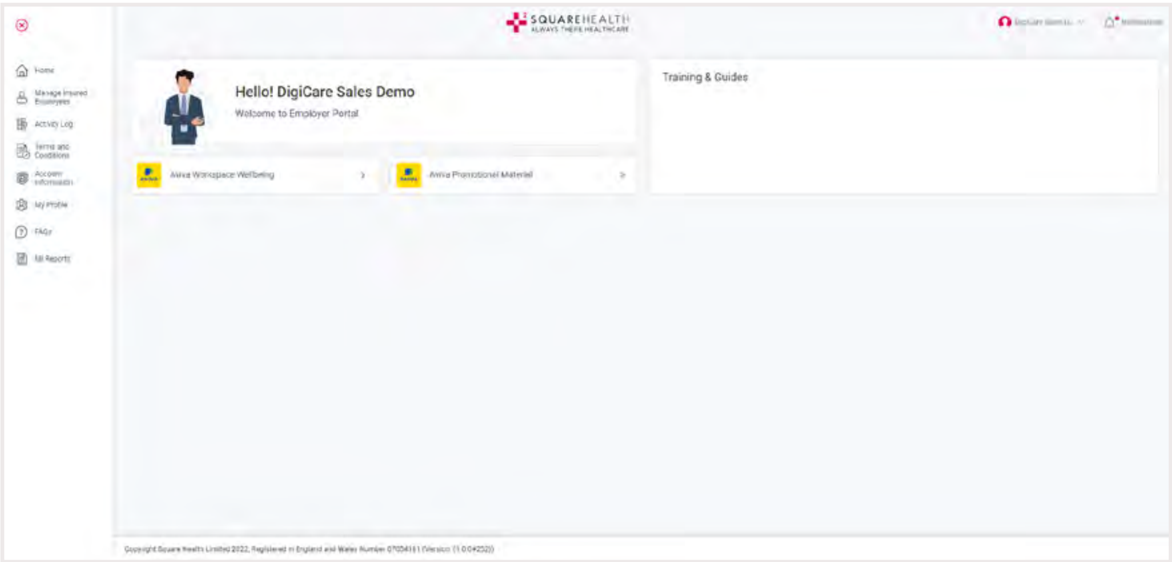
If you forget your password, you can reset this from the Customer Portal log in page and follow these steps:

1. Click on ‘Forgot Password?’
2. Enter your email address and a password reset link and a verification code will be sent to your registered email address.
3. You’ll receive an email containing the above information to complete your reset.
4. Click on the reset link from the email and you’ll be redirected to the password reset page, where you can create your new password by entering the verification code.

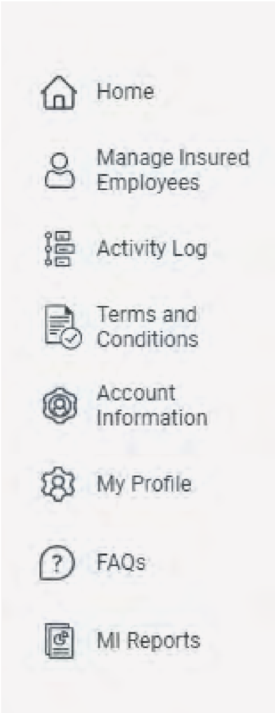
5

Homepage

The homepage provides links to manage your employees and view more information on the Aviva DigiCare+ Workplace proposition through a dedicated webpage where you can access all promotional materials. It also enables you to buy licenses for your uninsured employees.



1 There are seven options on the Homepage side-menu:



1. **Manage Insured Employees** - to add, de-register, export data and view a history of uploaded data, plus re-trigger emails to individual employees.
2. **Activity Log** - this is a log of all activity on the Customer Portal by your portal users.
3. **Terms and conditions** – for information about the Portal terms and conditions, you can review them here.
4. **Account Information** - view and edit information about your company and products and maintain your employees on Aviva DigiCare+ Workplace.
5. **My Profile** – you can review and edit your personal details and change your log in password here.
6. **FAQs** - common questions and answers on Aviva DigiCare+ Workplace.
7. **MI Reports** – to create and export a report for registrations and active users within your organisation (please note an active user is someone who has utilised a service within the Aviva DigiCare+ Workplace app).

2 Clicking on alongside your username will show the following options:

- Change Password
- Log out

3 Clicking on the icon will bring up a pop-up detailing any unread Customer Portal notifications. You'll also see a '**Clear All**' button below the notification bar, which you can use to clear your notifications once you've read them.

6

Account Information

Here you can view and manage the information on your company details, product details and system users.

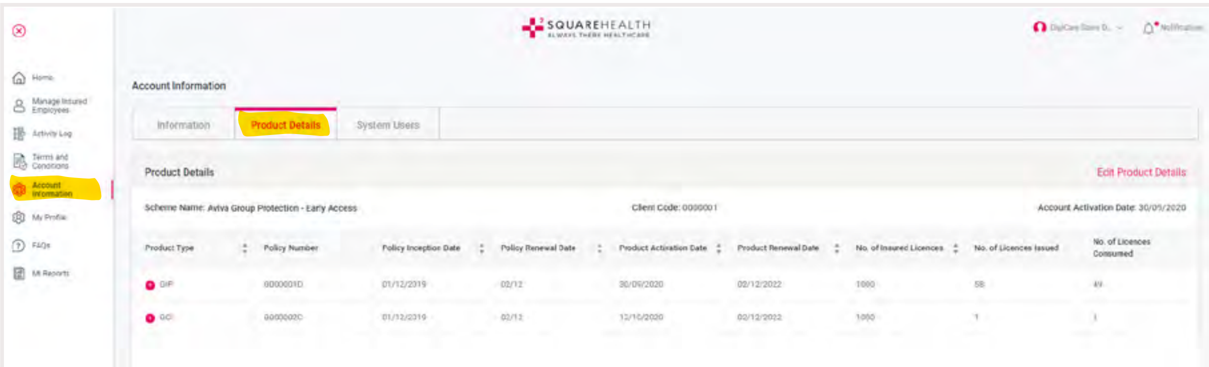
Clicking on '**Account Information**' from your side menu will redirect to the '**Account Information**' page.

Information Tab

Here you can view and edit the information about your company.

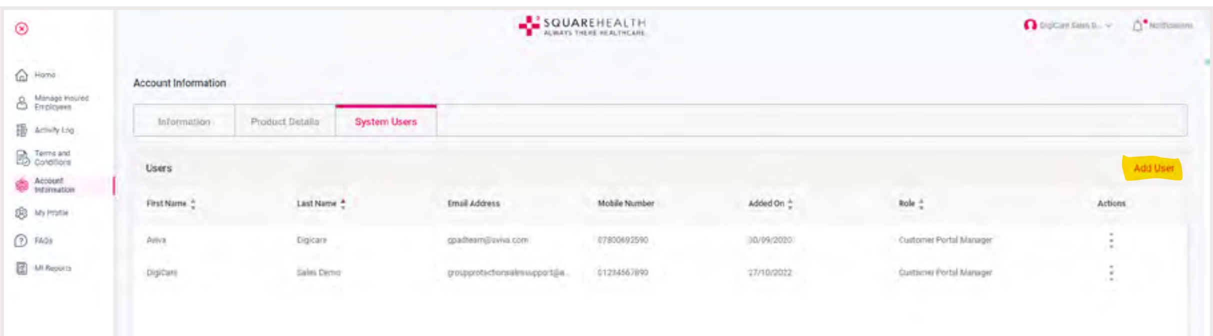
Product Details Tab

This will show you the details of your products, your Aviva policy number(s) and the key dates of your products. Data of '**Remaining Licenses**' will also visible and the '**Product Activation**' date can be changed if the product is not yet active - you can do this by clicking on '**Edit Product Details**'.



Customer Portal System Users

Here is where you can view, edit and add additional users to help you manage the Customer Portal. To do this, please select '**Add User**' on right hand side.



Add User

Step 1

User Role

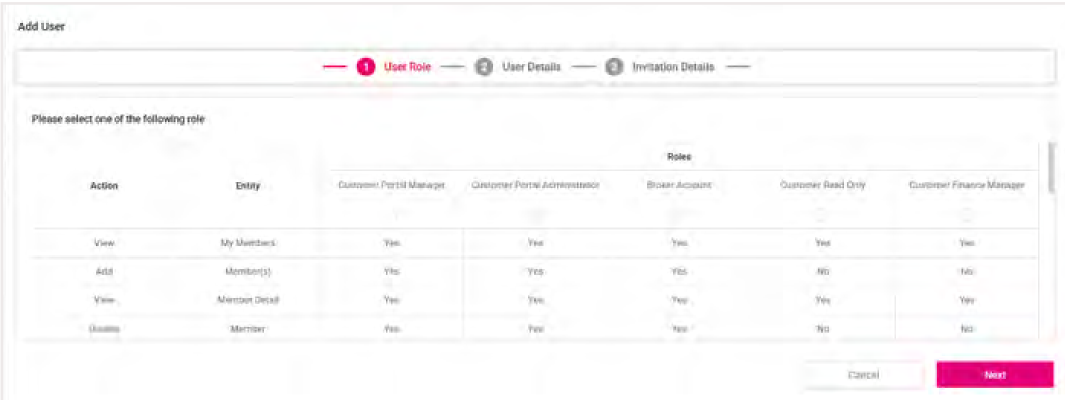
Select the role and level of access you would like the new user to have.

Please select:

- Customer Portal Manager (primary user)
- Customer Portal Administrator
- Customer Read Only
- Customer Finance Manager

If you're a Broker managing a customer account, please contact **digicare@aviva.com** to set up the account, if you haven't already.

Depending on your selection for the user created, you'll need to provide 'view', 'add' or 'revoke' access within the Customer Portal to your employees.

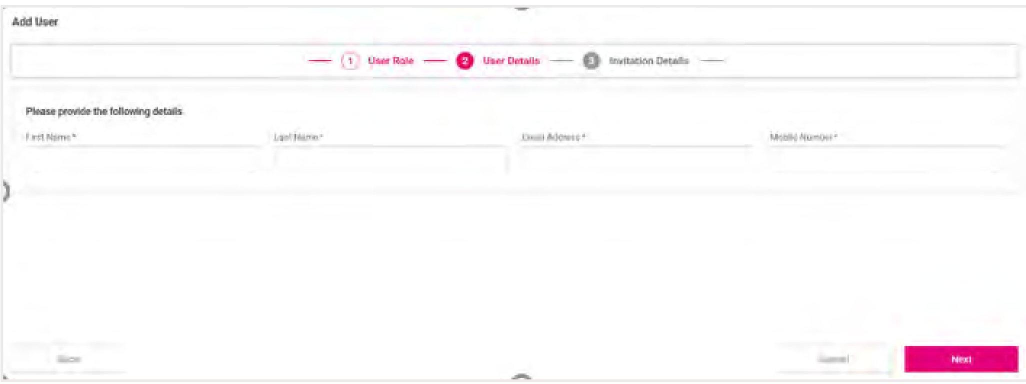


Step 2

User Details

The following user details need to be added and **all are required as mandatory**.
When adding the employees email address the system will check if it already exists.

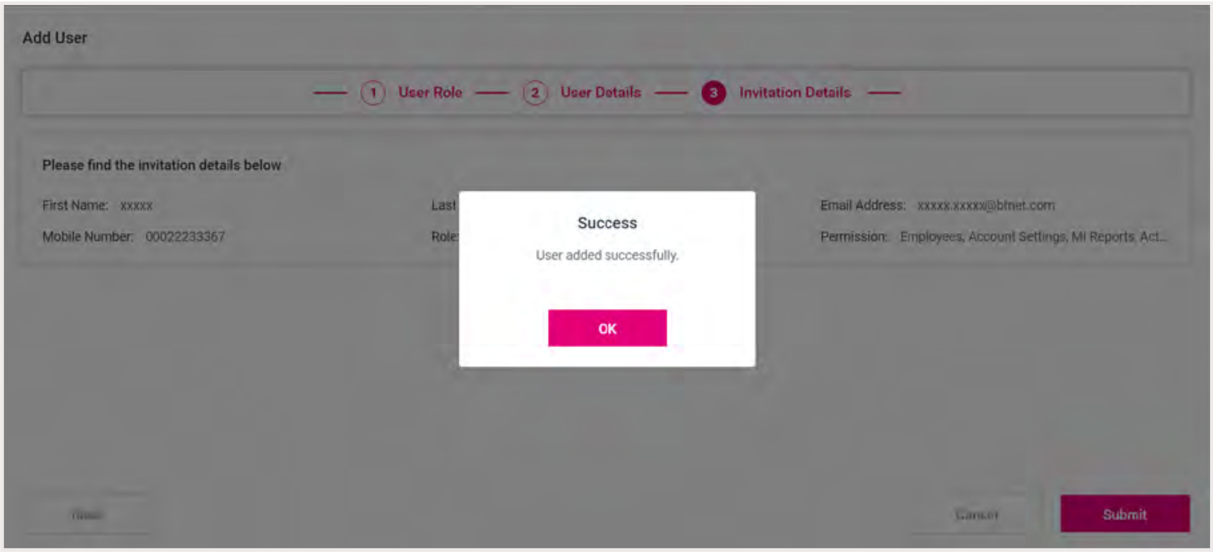
- A First name
- B Last name
- C Email address
- D Mobile number



Step 3

Invitation

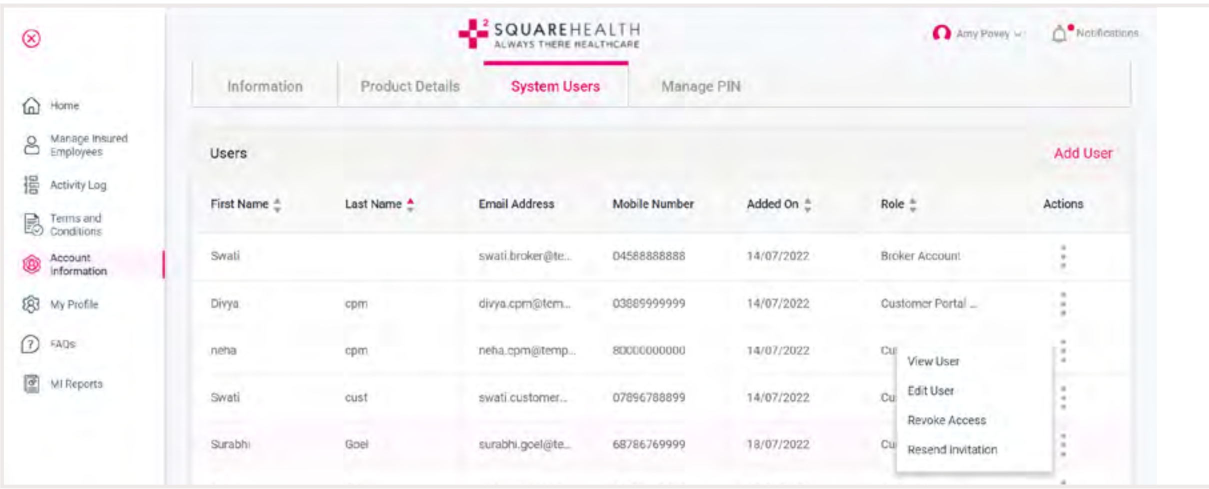
Confirmation of the information you have provided will be shown here and you can complete the process. On clicking '**Submit**', an invitation email will be sent to your new user containing details on their log in and registration process.



User Actions

Clicking on the ⋮ will display options for each user.

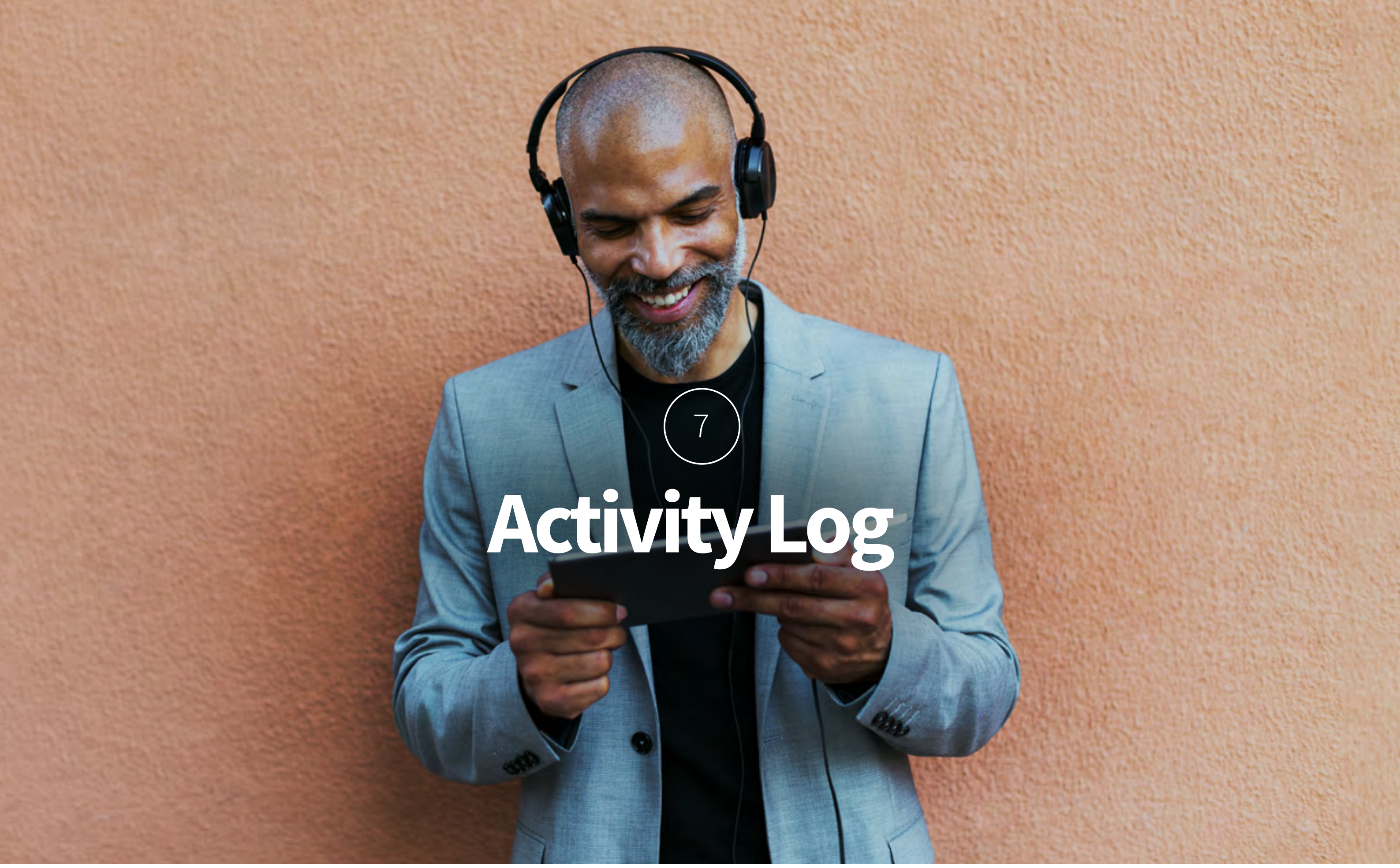
If resend invitation is not available, it means the employee has already verified their account and they should follow the '**Forgot Password?**' route via the Customer Portal.



Please note: this list may vary depending on the users current status.

Important note - Please be aware that anyone you add as a user to the Customer Portal and subsequently add as a product member (either through a CSV spreadsheet upload or manually add) will not receive an invitation email to the Aviva DigiCare+ Workplace app. Their log in details for the app will be the same as their Customer Portal log in details and can't be changed independently.

Similarly, anyone you've already invited as an Aviva DigiCare+ Workplace app member and then add as a Customer Portal user will not receive an invitation email to the Customer Portal. Their log in details for the Customer Portal will be the same as their Aviva DigiCare+ app log in details.



7

Activity Log

The 'Activity Log' allows you to view and audit all changes that have been made on the Customer Portal by you or any added users. You can search the 'Activity Log' based on the following criteria.

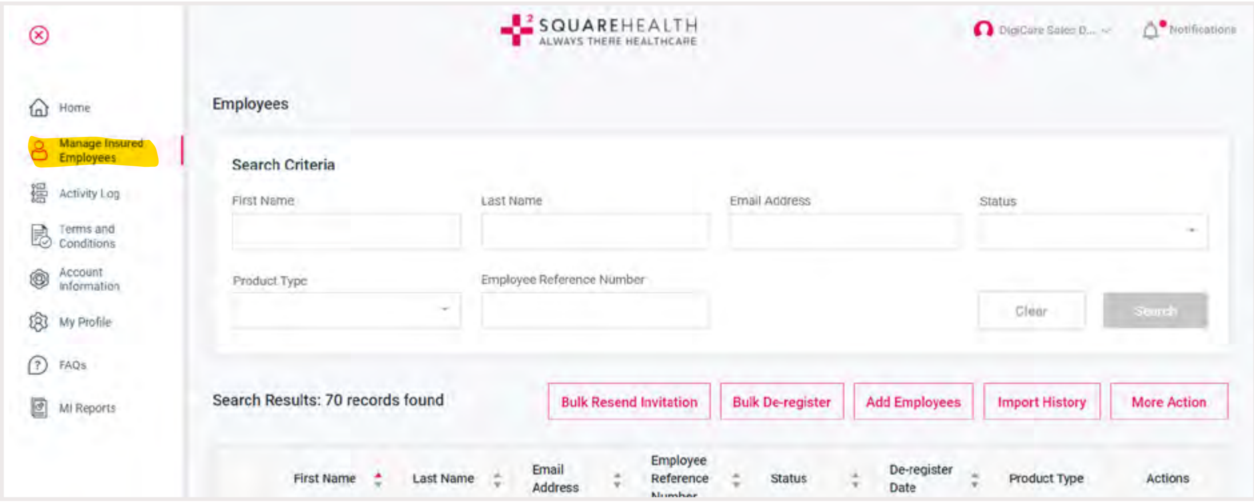
- User who performed the activity (name)
- Role
- From date (this is mandatory search criteria)
- To date (this should not be before the 'from date' and is mandatory search criteria)

8

Manage Insured Employees

Clicking on the '**Manage Insured Employees**' link from the side menu will direct you through to the '**Employees**' page. This is the main location where you will manage the employees within your policies.

It's your responsibility to add any new joiners and de-register any leavers using these functions.



Search Employees

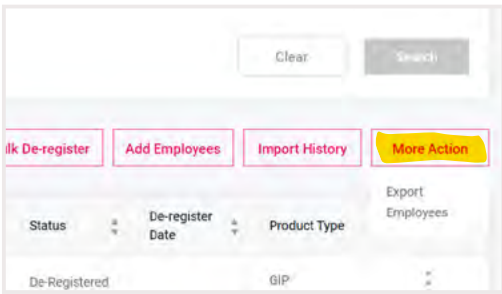
You can search for employees based on following criteria:

- First name
- Last name
- Email address
- Status
- Product type
- Employee reference number (if used to upload members)

Export Employees

Selecting '**More Action**' gives you the option to export employees and to download the CSV spreadsheet.

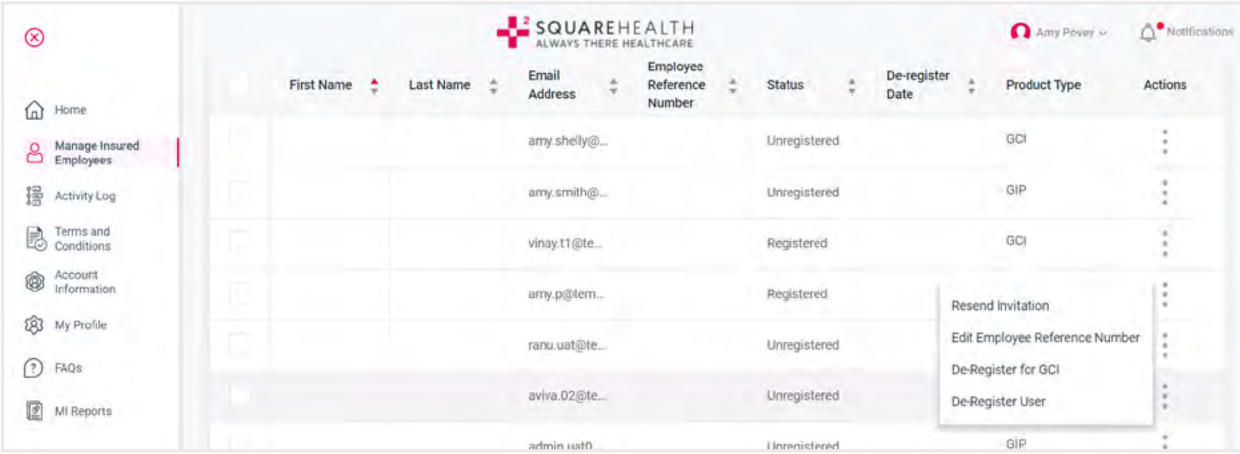
This will contain the list of the employees which are shown in the '**Search Customers**' results.



Managing Employees

Clicking on ⋮ under '**Actions**', adjacent to each set of employee details, will show the following options.

If any employee has already verified their invitation, then the '**Resend Invitation**' option will no longer be visible. In this case, the employee should be advised to download the Aviva DigiCare+ Workplace app from the **App Store** or **Google Play** and follow the '**Forgot Password?**' process.



- (A) De-Register (Separate De-Register option for the product types)
  - (i) A pop-up will appear to confirm the de-registration.
  - (ii) On confirmation, the employee will be de-registered.

De-registered employees will be able to use any previously booked appointments they've made in the app, but they won't be able to book any new ones.

Any de-registered employees will remain on your employee list and you have the option to re-register them if you need to.

If an employee has been added to your products but has not registered in the app within the required period, you can resend an invitation email from here.

To do this, click on '**Resend Invitation**' and an email will then be sent to the employee's registered email address with instructions explaining how to download and use the app on their mobile device. You'll see a '**Success**' message indicating that the Invitation has been resent to the employee.

9

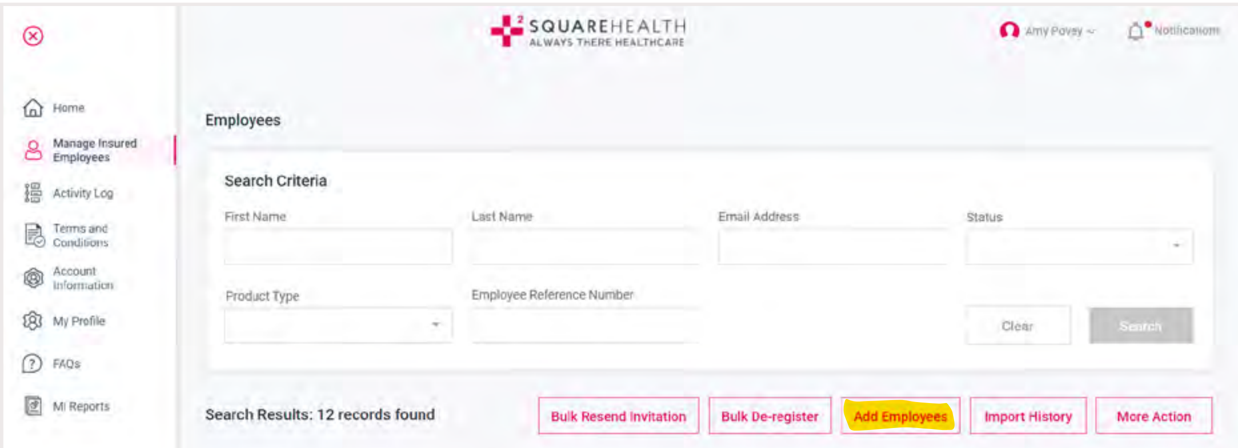
Add Employees

Here you can add any new joiners or, if you skipped the upload process in your first time log in, you can upload your user data here.

Case 1

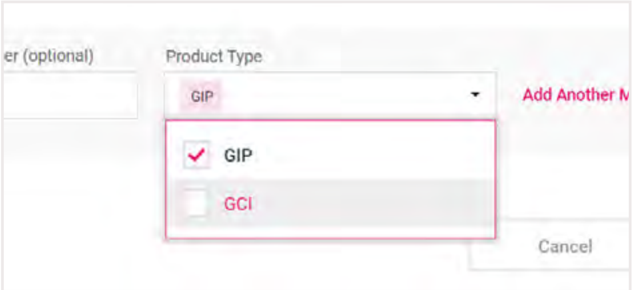
Add Manually

1. Clicking on '**Add Manually**' will show the following pop-up:

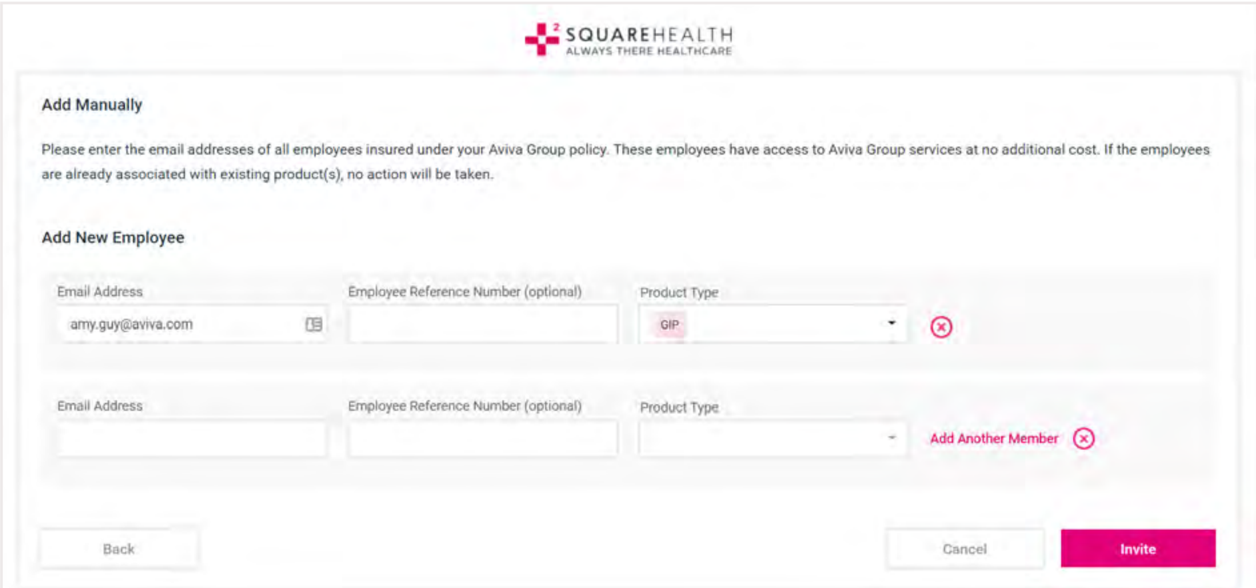


2 The following fields need to be entered by user:

- Email Address (mandatory, as it will be validated)
- Product Type (mandatory, multiple product types can be selected from the drop-down menu)



3 Clicking on 'Add Another Member' will insert a new row. (at most, 5 employees can be added manually at any one time)



4 Clicking on ⊗ will delete the row.

Case 2 Import with CSV spreadsheet

1 Clicking on 'Import Employees' will allow you to upload a CSV spreadsheet with any new employees.

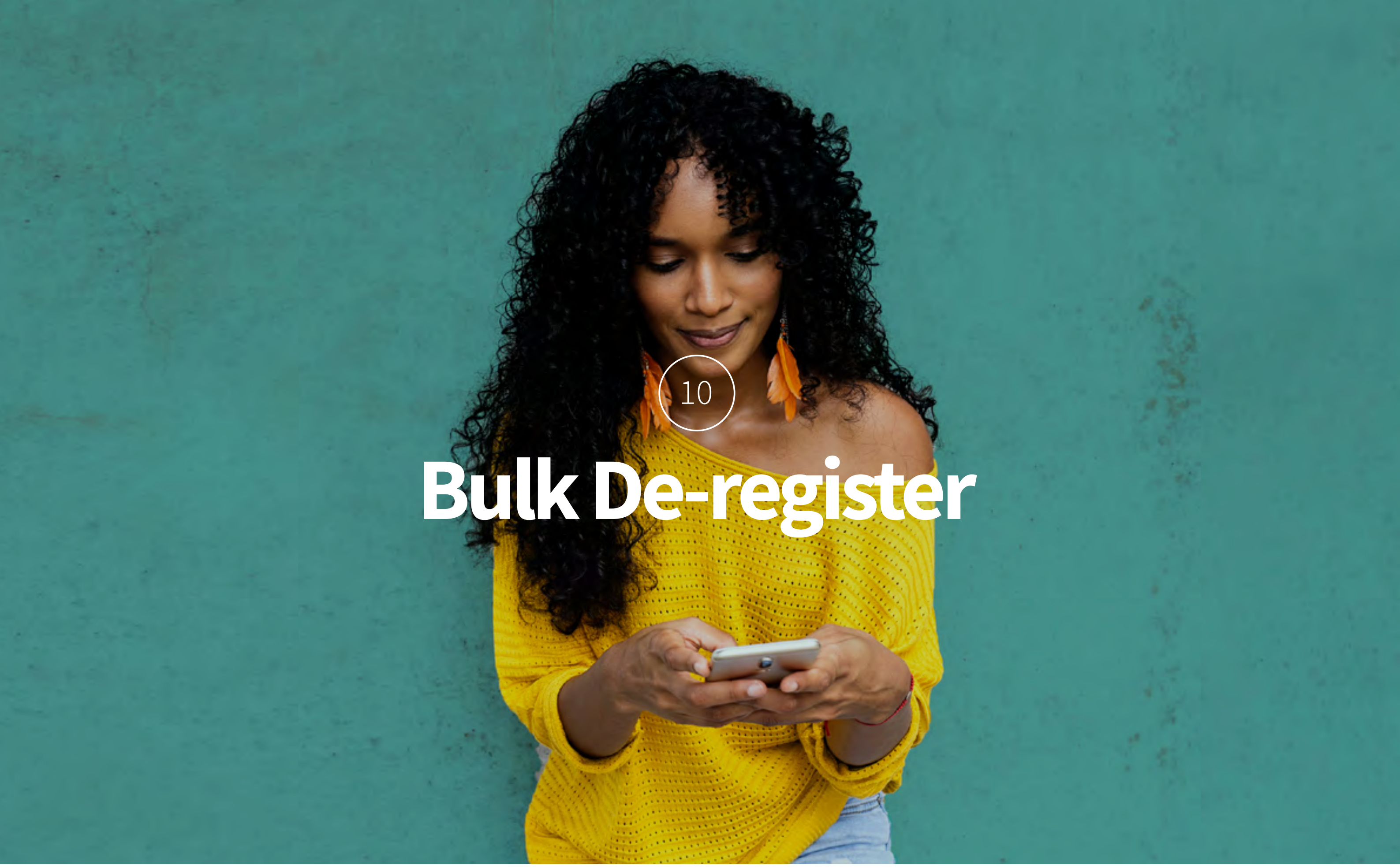
Please refer to the **Registration section above Step 3: upload service users** for how to upload a CSV spreadsheet.

Exceeding Licences

Aviva DigiCare+ Workplace is available for your insured employees.

When adding new employees, if the number of email addresses exceeds your Aviva DigiCare+ Workplace allowance, then a pop-up alert will be triggered to advise you.

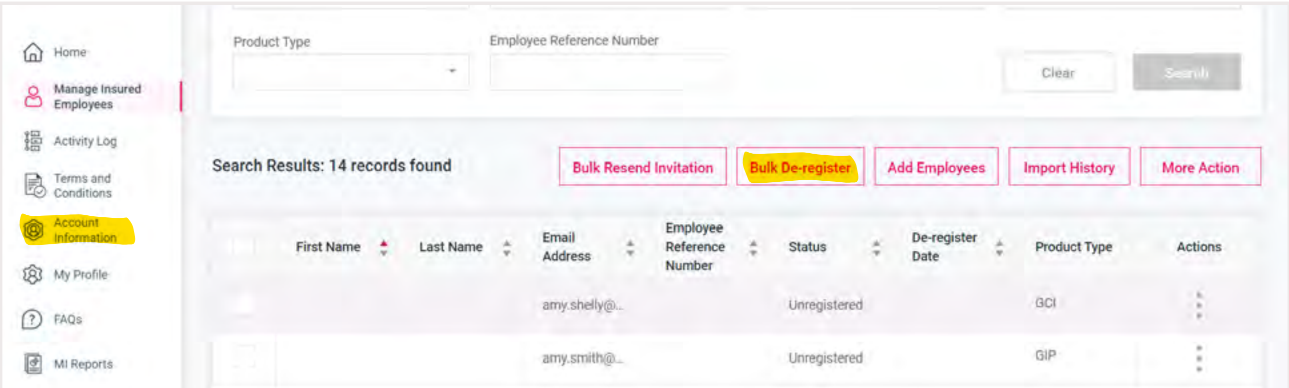
Please be aware that Aviva will be notified if you exceed your licence limit and may contact you to discuss this. If you click 'Yes' then the member upload will automatically be triggered.



10

Bulk De-register

If you have a number of employees that you need to de-register at the same time you can use the 'Bulk De-register' feature to upload a CSV spreadsheet with a list of all employees to de-register from a product.



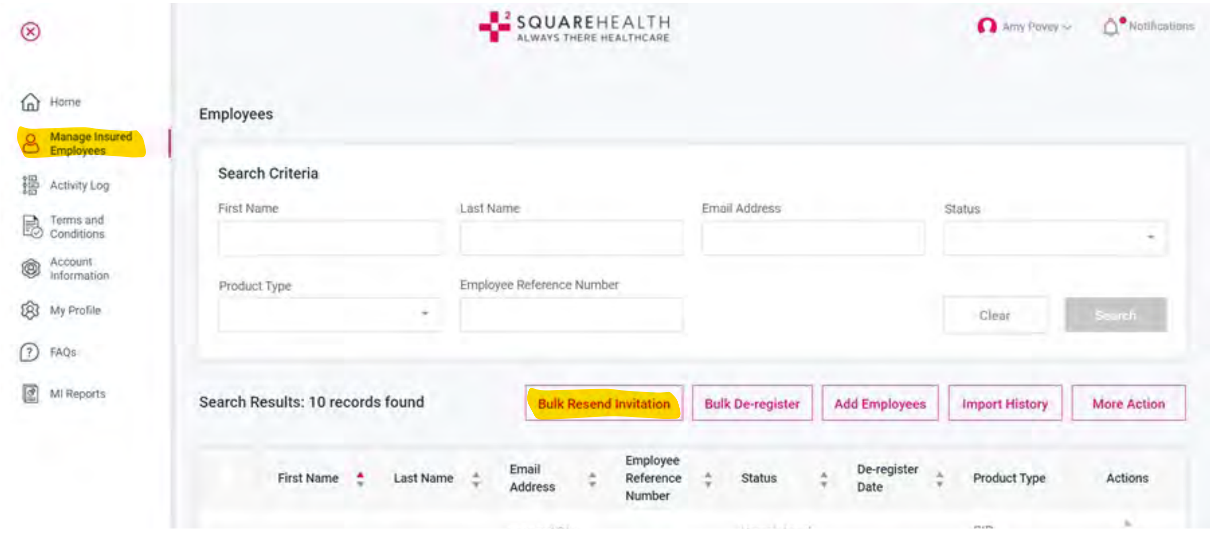
1. Click on 'Bulk De-register' button, then the user will be navigated to the 'Bulk De-register' screen.
2. Please refer to the **Registration section above Step 3: upload service users** for how to upload a CSV spreadsheet.
3. Please refer to the 'Manage Insured Employees' section above for how to de-register individual employees.

11

Bulk Resend

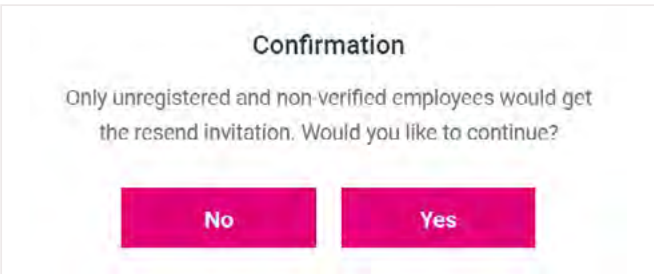
This function will allow you to resend invitations in bulk to those employees who have not yet registered. If there are no users that meet the resend criteria (e.g. all users are verified), then the button will appear ghosted out.

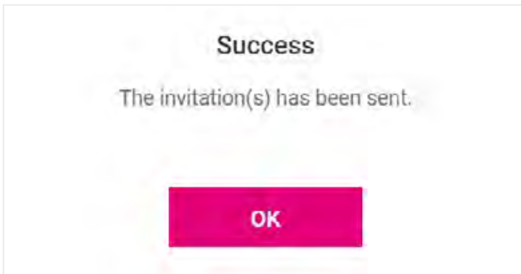
From the 'Manage Insured Employees' option appearing on the side menu, you can access the 'Bulk Resend Invitation'.



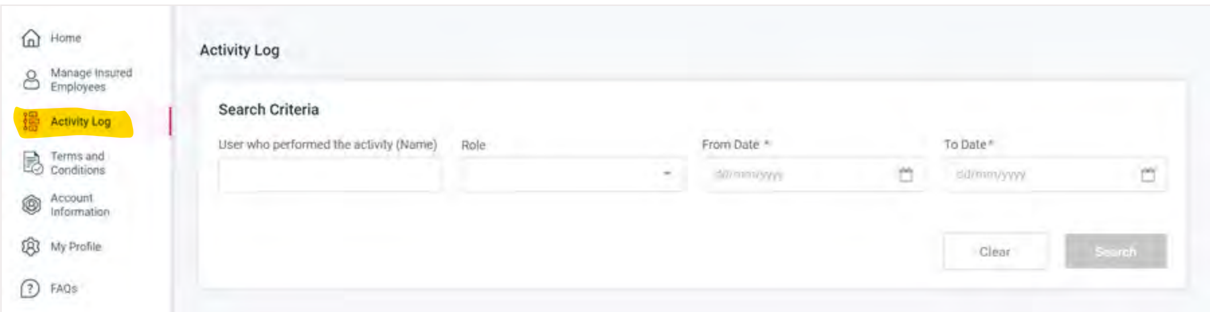
When clicking, you'll see the 'Confirmation' box pop up to remind you that only unregistered members will be available for resend invitations. Invites will be sent automatically upon clicking 'Yes'.

A final pop-up will appear once successful invites have been sent. Click 'OK' to complete the process.





You can then go to the 'Activity Log' to see how many users have received a resend. You'll find the 'Activity Log' within the side menu.

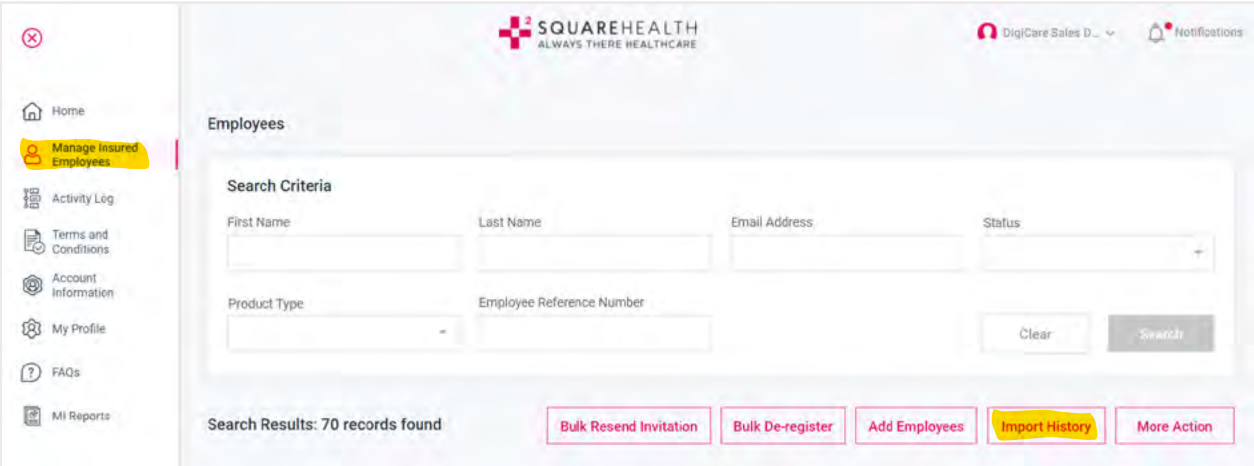


12

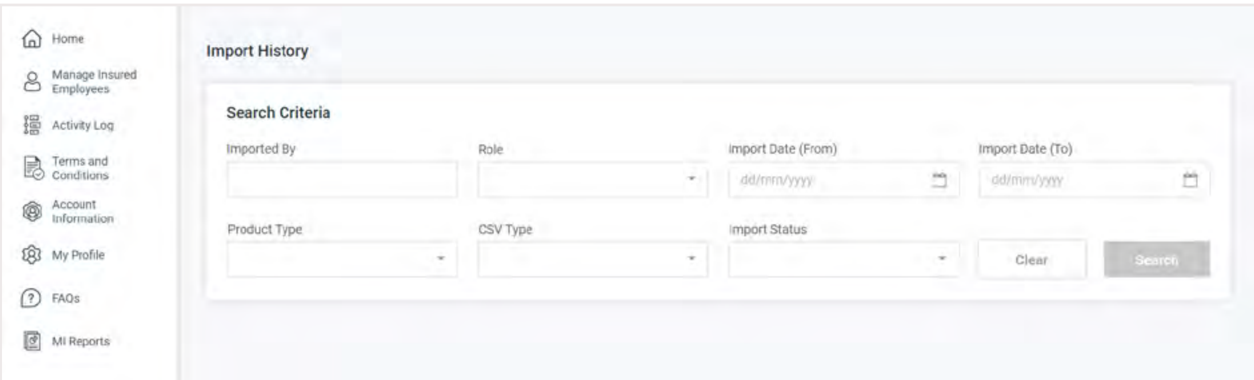
Import History

You can view a history of all your uploaded CSV spreadsheets here. This function can also be used to download any previously uploaded files. When doing this you can check the status of any individually uploaded employees and why an employee upload has failed.

1. Click on '**Import History**' button, and you will be navigated to the '**Import History**' screen.

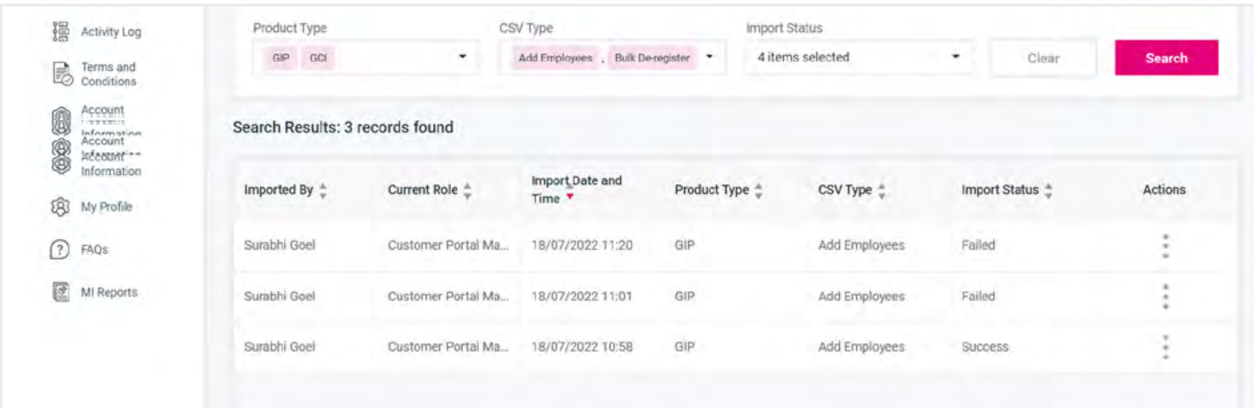


2. The '**Import History**' presents the list of historical '**Import Members**' (i.e. CSV Member upload) actions.



If results are found, then they'll be displayed in the table.

3. Clicking against each upload will allow you to download a copy of the file.



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More Information

If you need help on the Customer Portal, please email **digicarehelp@squarehealth.com**.

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Appendix

The web is compatible with the following web browsers:

- Chrome 55, 56, 57
- Safari 9, 10 (Mac only)
- IE 11 (Windows only)
- Firefox 52, 53, 54
- Edge 14 (Chromium version Windows only)
- Chrome Mobile - Latest version
- Safari Mobile - Latest version
- Samsung Mobile - Latest version
- Chrome v49-53
- Safari 8 (Mac only)
- IE 10 (Windows only)
- Firefox 45-51

The web is compatible with the following operating systems:

- Windows 10 Gold
- Windows 8 Gold
- Windows 7 Gold
- MacOS 10.12

The web requires any of the following network connections:

- Broadband connection via cable
- Wi-Fi
- 5G
- 4G
- 3G

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