



ASSOCIATION OF RETIREMENT BENEFITS SCHEMES  
*The First Point of Reference for all Retirement Benefits Matters in Kenya*

## **Member Portal User Guide**

**By**

**Association of Retirement Benefits Schemes**

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## CLIENT PORTAL

This is the E-services portal we have designed to enhance the convenience at which our members are able to access different ARBS services. Members can book courses and download all the documents uploaded by the administrators. It makes things easier for both the members and the team that serves them.

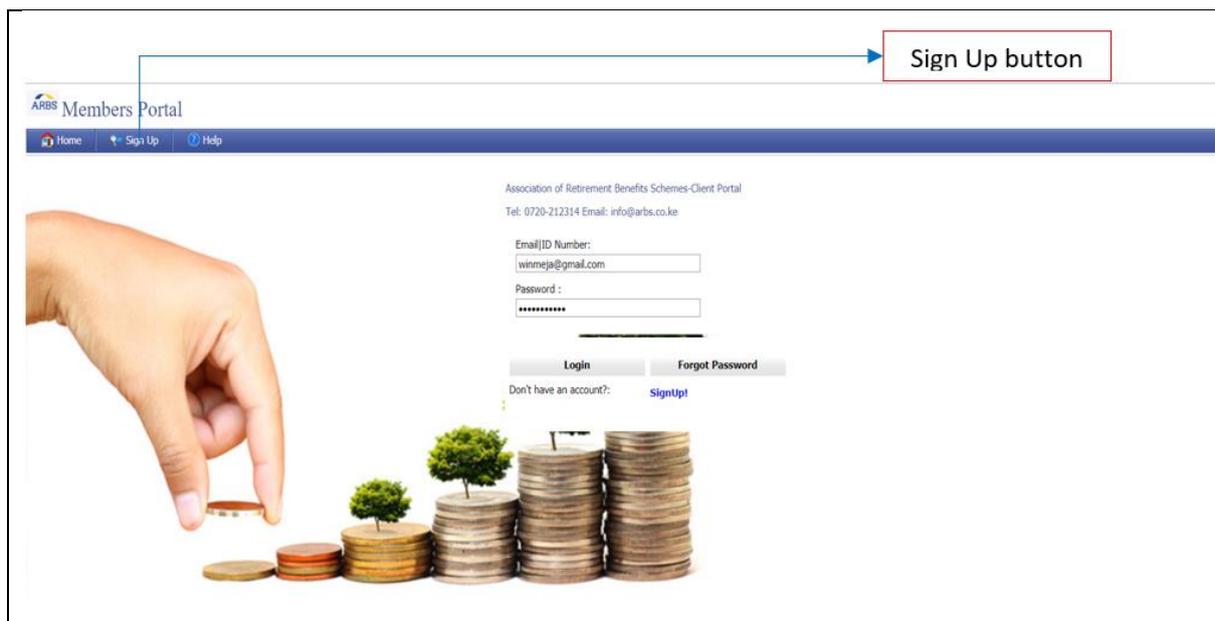
## PORTAL SIGN UP

Provided that you are a member of any scheme, one should be able to register easily to the portal system and enjoy the ease of access and benefits that come with the portal.

The URL address is; <https://arbsportal.azurewebsites.net>

### Sign Up

To sign up to the portal click on Sign up button



Ensure you sign up by providing the correct and appropriate details for example your email address, scheme name, employer, ID number and mobile number. Once you have filled all the details, click on “Accept Our Terms of Use and Privacy Policy”. Finally click on “Submit Request”.

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Join iBusiness

Your privacy is important to us. Please take a moment to read our [Privacy Policy](#)

Enter the following information to create an account

Full names: WINNIE KARIMI

Email :\* winmeja@gmail.com

MobileNo:\* 254720000001

Scheme: Kingsland Court

Employer: Kingsland Court

IDNumber:\* 25000001

Password :\* .....

Confirm Password:\* .....

Accept Our Terms of Use and Privacy Policy

Annotations: Login Button, Sign Up details

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### Log In (Access)

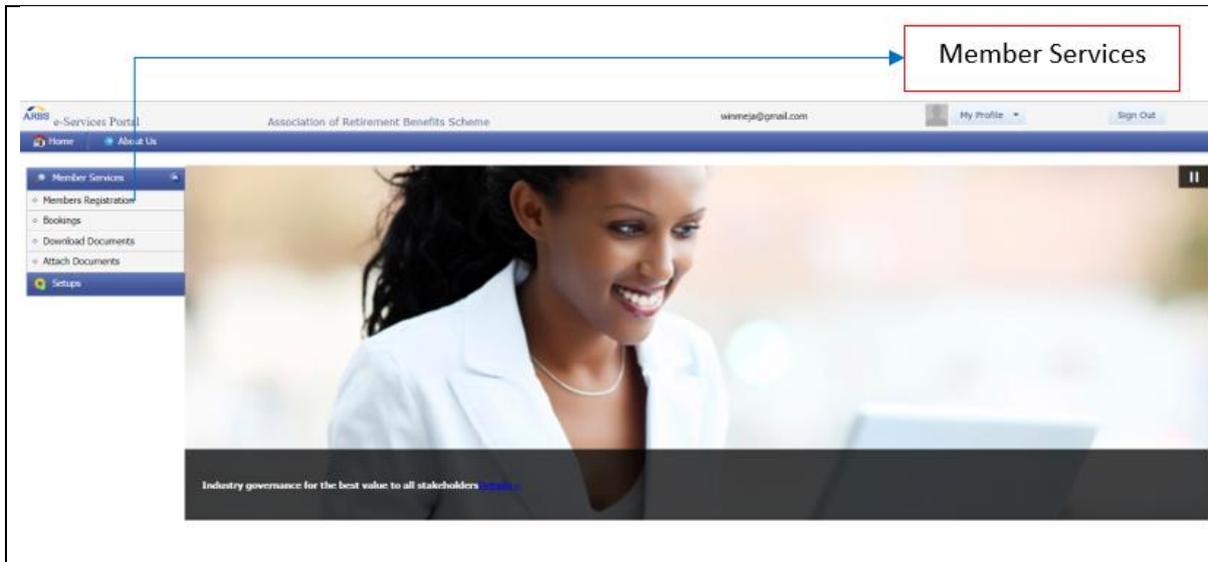
Once you have submitted your sign-up request, it is approved by the administrators and a notification is sent to your email address that you provided while signing up.

You can now go ahead and login using the same credentials you had filled during sign up. Click on [Log in button](#) to access your member portal.

### Forgot Password

In the case where one forgets their password, they can always recover their password using the “Forgot Password” button that is usually on the “log in” page.

## MEMBER SERVICES



Once you are logged in, you can access the following services

### Member Registration

A person can register in order to book trainings either as an Individual, Administrator or as a Trustee. To register as a member, provide all the membership registration details and Save.

The screenshot shows the 'Membership Registrations' form in the e-services portal. The form is titled 'Membership Registrations' and has a toolbar with 'Save', 'Edit', 'Links', 'Close', and 'Help' buttons. The form is divided into two columns of input fields. The left column contains: FullNames (\*), Email (\*), Address (\*), MembershipType (\*), NominatedPerson (\*), CellPhone(Nominated Person) (\*), ActiveMembers (\*), DeferredMembers (\*), and RBARegNo (\*). The right column contains: Telephone (\*), Mobile (\*), PostalCode (\*), NumberofTrustees (\*), Email(Nominated Person) (\*), Position(Nominated Person) (\*), Pensioners (\*), SchemeType (\*), and BusinessNature (\*). The form is pre-filled with the following data: FullNames: John Doe, Email: john1@live.com, Address: 884, MembershipType: Advisers; Advisers, NominatedPerson: John, CellPhone(Nominated Person): 0722000001, ActiveMembers: 100, DeferredMembers: 0, RBARegNo: 012345, Telephone: 02012345, Mobile: 07240000001, PostalCode: 00200, NumberofTrustees: 5, Email(Nominated Person): john1@live.com, Position(Nominated Person): Administrator, Pensioners: 0, SchemeType: SBRS; STAFF BENEFITS RI, BusinessNature: Pension.

### Bookings

You can book different courses in the e-services portal. To book, provide your personal details such as ID number, email address, phone number, experience etc. Select the course you are booking, enter the mode of payment and state any other additional requirements you have. Once you have filled all the fields, click Save and then Submit

Upon saving, if you have any changes you need to make to your course booking click Edit, make the changes and then save. **NB/** You can only edit before submitting, upon submitting if you wish to edit you will be prompted by a dialog box as shown below.



### [Download Documents](#)

On the download documents page, one can view and download different reports that the administrators have published for the purpose of communicating.

To download click on the Download button on the selected document and the document will be downloaded into your computer.

### [Attach Documents](#)

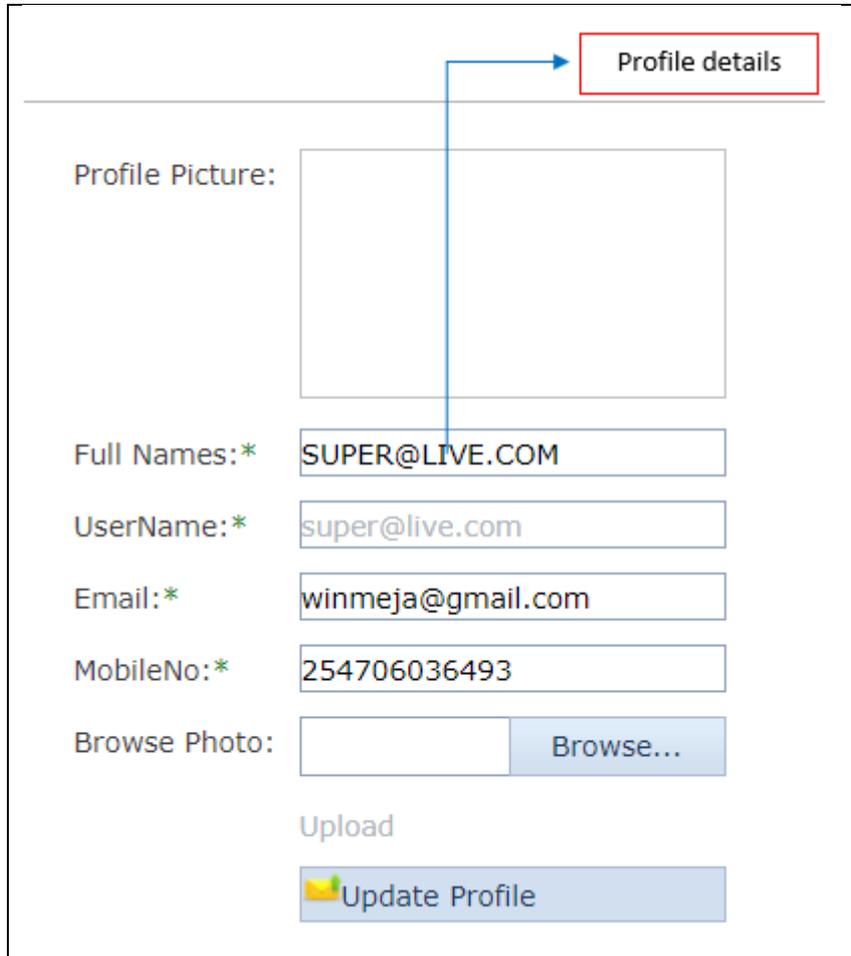
Upon registering, booking a course, members are required to upload different documents via the client portal. Such documents include an ID, a passport, or a payment slip.

To upload, select your Booking Reference number, Browse for the document then click [Upload](#), select the Document category (Passport photo, Payment Slip or Membership document). Enter any remarks/narration and then click [Submit](#)

## UPDATING PROFILE

### Edit Profile

You can edit your profile details in the edit profile menu that appears in the drop down menu under “My Profile”. After filling in the new profile details click on “Update Profile” for your changes to be saved



The screenshot shows a web form for editing a profile. At the top right, a red-bordered box contains the text "Profile details". A blue arrow points from this box to the "Full Names" input field. The form contains the following elements:

- Profile Picture:** A large empty rectangular box.
- Full Names:\*** An input field containing the text "SUPER@LIVE.COM".
- UserName:\*** An input field containing the text "super@live.com".
- Email:\*** An input field containing the text "winmeja@gmail.com".
- MobileNo:\*** An input field containing the text "254706036493".
- Browse Photo:** A button with a white background and a blue border, labeled "Browse...".
- Upload:** A label positioned above the "Update Profile" button.
- Update Profile:** A blue button with a yellow folder icon and the text "Update Profile".

### Reset Password

One can also edit their password in the Reset Password field that appears in the drop-down menu.

Enter the old password, then the new password, confirm the new password then save the changes by clicking [Save Changes](#)

### Reset Password

 Save Changes    Links    Close    Help

Password Reset

UserName:

Old Password:\*

New Password:\*

Confirm Password:\*

### Sign Out

To sign out of the eservices portal, click “Sign Out” button that is on the top-right corner of the home page