

Transcript: Guide to registering for the Pension Portal

Hi everyone.

Welcome to this quick video guide on how to register for the Pension Portal. Before you start, you'll need your National Insurance number, the name of your current employer if you're an active member or the year you retired, if you're a pensioner member. If you've left the scheme but aren't claiming your pension yet, you're known as a deferred member, and in this case, you'll need the date that you left the scheme, and a mobile phone to set up a second level of security.

To get started, head to www.civilservicepensionscheme.org.uk which you can see on my screen here and click on 'Log In' in the top right-hand corner of the page. This will bring you to the Pension Portal landing page, which you can see here. And again, head to the top right-hand corner and click on 'Login'. On the login page under 'New User Registration', click on 'Register' and this will bring you to the beginning of the registration process.

As I mentioned earlier, you'll need your National Insurance number, the name of your current employer if you're an active member, the year you left the scheme, if you're a deferred member, or the year that you retired, if you're a pensioner member and a mobile phone in order to register. If you need some extra help, you can click on 'I need some help' and that will bring you to our step-by-step guidance on the Civil Service Pension Scheme website, which is here.

When you're ready, click on 'I'm ready' to get started. So, you'll now be asked to enter some details, starting with your National Insurance number. Once you've done this, click 'Next'. You'll now be asked to enter some more information, including your date of birth, your surname, and if you're an active member, the name of your current employer. This is a dropdown list so you can either type in your employer's name or search through the list.

In this case, we're using HMRC. A quick tip. If you've recently changed jobs and with that changed employers and if the name of your new employer isn't accepted, it may be that we haven't received updated information for you yet.

If this happens, just try entering your previous employer and see if that works. And again, as I mentioned, if you're a pensioner member you'll instead be asked for the year that you retired at this point. If you're a deferred member, which is when you've left the scheme but haven't claimed your Civil Service Pension yet, you'll need to enter the date that you left the scheme. When you've completed these fields, click 'Next'.

So, now that we've verified who you are against our records, you can create a username and password for your account, which you'll use whenever you log in. Your username needs to be made up of letters and numbers and it has to be unique.

It also can't be your email address. Next, you can create a password and there's a short list of criteria that you need to fulfill to ensure your password is secure and you'll notice that as you meet each one, they'll turn green.

So, it's really easy to see when you've met all the criteria and you're ready to proceed. When you've done this, click 'Next'. So, it's now time to enter your email address and we always recommend using a personal email address instead of a work one, and we'll use it to send you a verification code. When you've done this, click send email. Within a few minutes, you should receive an automated email with a six-digit code. Enter that code here to complete this step.

So, I've just received my code. So, once you've done this, you can click 'Next'. If you don't receive the email after a few minutes, check your junk or spam folder first and if it isn't in there, click on 'Send email again' just here.

So, when you've entered the code, click 'Next' and you'll come to this final step, which is where you'll set up two factor authentication.

Two factor authentication is essentially a second level of security to keep your information safe and secure, you can choose how you do this. You can either receive a text message to your mobile phone number, or you can use an authenticator app if you have one already installed on your device. Both methods will produce a six-digit verification code for you to enter the next step to verify that this is your device. If you don't already have an authenticator app installed on your device, I would recommend opting for the text message route because it's a little bit more straightforward. So, if you choose the text message route, click on the box. Here you'll need to enter your mobile phone number and click 'Send code'. This will send an automated text message to your phone number, which you can enter below. If you don't receive the code within a few minutes, click on 'Didn't receive a message, send again' to resend it.

So, I've just received mine. So, enter it here and then click 'Next'. That will close the pop up and then you can click 'Next'. If you decide to use the Authenticator App, click on the 'Authenticator App' option and similarly you'll see this pop up. You'll now need to open your Authenticator App on your device and scan this QR code. It will then display a six-digit code for you in the app to enter below.

So, I'm just doing that now and I'm going to enter my six-digit code. Once you've done this, click 'Next' This will close the pop up, this box will turn green and then you can click 'Next'. Finally, you'll see a list of recovery codes on this next page, so these are to use if you ever lose access to the phone or mobile device that you use for two factor authentication. Each code is personalised to

you, and can only be used once, so it's essentially a backup in case you ever lose your device or lose access to your device. You can copy these codes, print them off, or download them to keep them somewhere safe. It's also worth knowing that you can actually find these in the portal once you set up your account where you can download them from there or you can regenerate them if you ever run out, hopefully you won't.

So, once you've done this, you can click 'Next' and you're done.

So, now you can either give us some feedback in our short survey about how you find this process, or you can simply click 'Take me to sign in' where you can sign into your new account.

Authentication code, which I've just received. Click 'Verify', and here you are, signed into the Pension Portal. Thank you very much for watching.