GET ONLINE ACCESS USER REFERENCE GUIDE

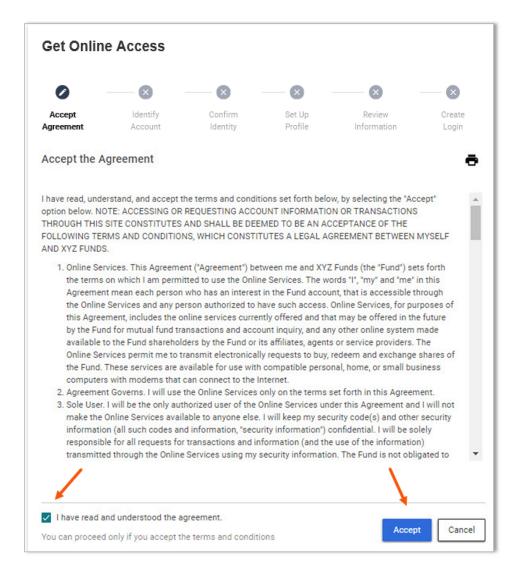


www.virtus.com

1. Accept the Agreement

On the **Accept the Agreement** page, check the "I have read and understood the agreement." box and select Accept to proceed to the next step.

Note: New users will see indicators at the top of the page change from grey to green as they move successfully through the process.



2. Identify Your Account

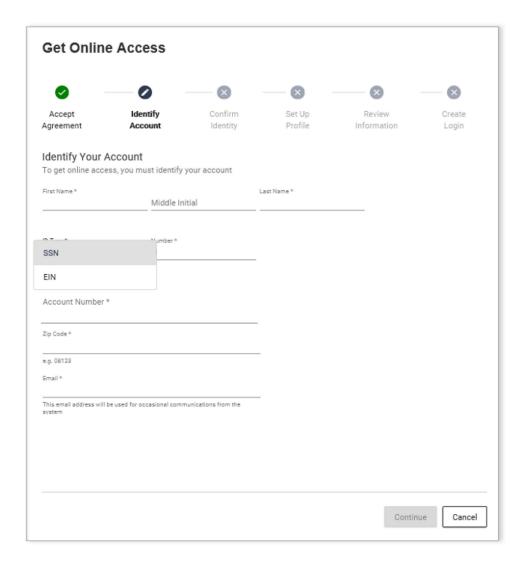
Next, complete the **Identify Your Account** page.

Only one account associated with the Tax ID is required.

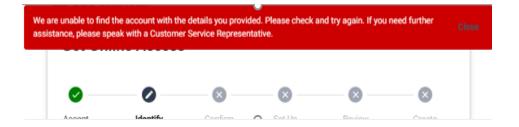
Complete the following fields:

- > First Name / Last Name
- > ID Type select SSN or EIN from the pop-up bubble
- > SSN or EIN Number
- > Account Number
- > Zip Code (Foreign address accounts use 00000)
- > Email Address

Click Continue to proceed to the next step or Cancel to return to the **Log In** page.



An error message displays when the identifiers entered do not match existing records. Data may have been input incorrectly or further assistance may be required. A customer service representative can assist.



3. Confirm Your Identity

To proceed, Confirm Identity.

When the data is a match, the **Confirm Your Identity** page displays.

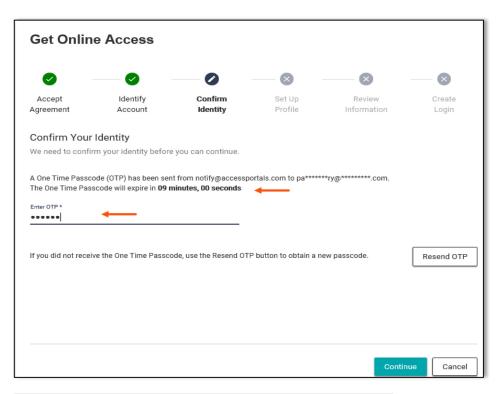
A one-time passcode (OTP) is simultaneously sent to you via email, using the address entered in Step 2.

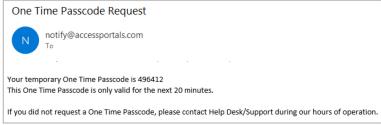
OTP received via email from notify@ accessportals.com.

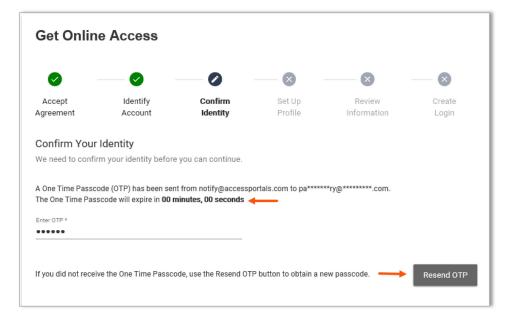
The passcode, which expires twenty minutes after receipt, must be entered on the **Confirm Your Identity** page before you can proceed. There is a useful expiration timer included and an option to "Resend OTP" should a new passcode be required.

Note: If the user clicks Resend OTP, a message alerts the user to expect a new passcode email.

The user enters the new passcode and clicks Continue to proceed or Cancel to return to the **Log In** page.







 $\label{thm:condition} \mbox{The One Time Passcode you entered is invalid or 20 minutes has elapsed since the passcode was generated. } \\$

Another One Time Passcode has been sent.

4. Set Up Your Profile

Enter your address, including street and city.

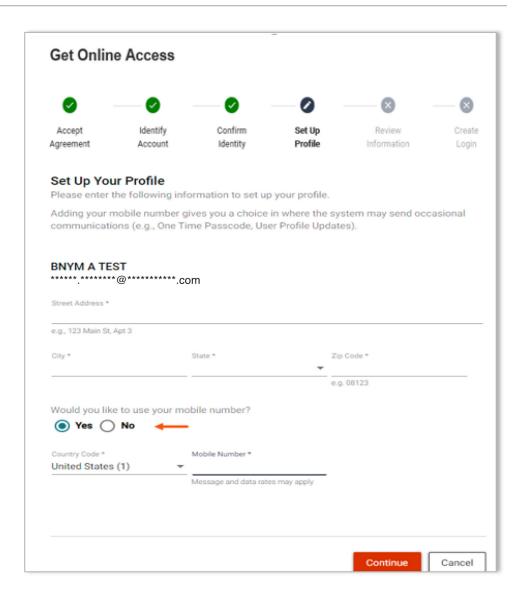
Scroll to select the state.

The zip code carries over from **Identify Your Account**.

There is an opportunity to add a mobile phone number enabling SMS messaging. The option defaults to Yes; you must select No to not provide a mobile number.

Note: Providing a mobile phone number gives authorization for the delivery of temporary passcodes and occasional communications. Authentication by text is often more immediate than email authentication, which typically depends on email provider speed. The user is responsible for any charges from the mobile phone service provider that these text messages might incur.

Complete all fields, and click Continue to proceed or Cancel to return to the **Log In** page.

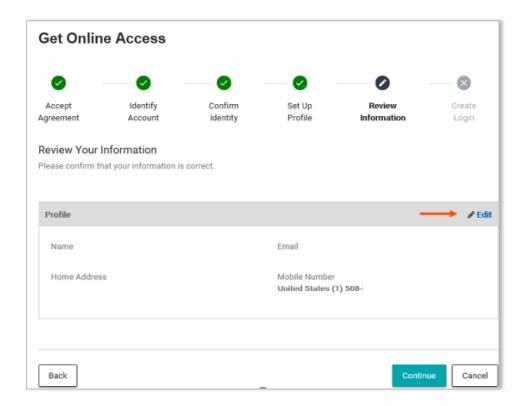


5. Review Your Information

Confirm that the Profile information has been accurately entered.

The Edit option allows you to make any corrections by returning to **Set Up Your Profile** where necessary changes to the Profile information can be made. Alternatively, click Back to make updates.

Once all fields are confirmed, click Continue to proceed or Cancel to return to the **Log In** page.



6. Create Your Login

The final step is to Create Your Login.

Create your own User ID and Password, adhering to the parameters provided.

The requirements change from grey to green as accepted entries are made.

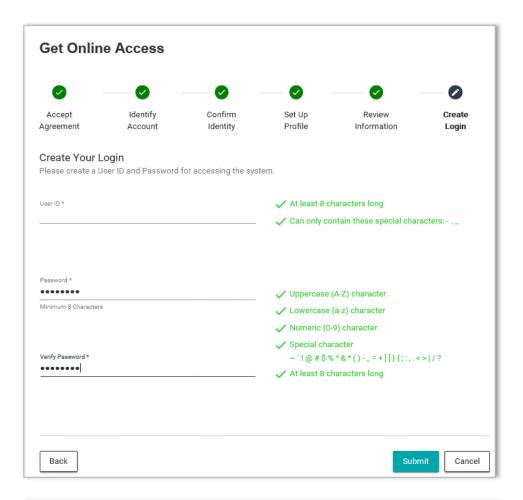
To change information on this page prior to clicking Submit:

- > User ID
 - remove all entries and re-enter
- > Password
 - remove the password entries, re-enter, and verify

Click Submit to complete the **Get Online Access** process.

Shortly after completing the process, you will receive notification via email confirming successful registration.

You will be returned to the **Log In** page and need to proceed through the login process to access your online account.



Online Access Registration Complete



notify@accessportals.com

Your registration is complete. You can log into your online account using the username and password you selected during the registration process.

If you did not initiate this registration or need additional support please contact help desk.