

## INFORMATION SHEET - USE OF ALVOSO EMPLOYER WEB PORTAL

This Information Sheet is intended for users of the Alvoso Pension Fund Employer Portal. It shows the first steps in navigating around the portal.

### Contractual Precondition

Before the employer portal can be used by employees of the employer and/or trustee, broker, etc., it is a contractual precondition that they must first sign the User Agreement. Please contact our administration so that this agreement can be signed jointly.

### Authorisation of Persons Responsible

Once the User Agreement has been signed, users will receive an activation message enabling them to open their personal user account on the portal.

This activation message will also be sent to users who have previously used an earlier version of our employer portal.

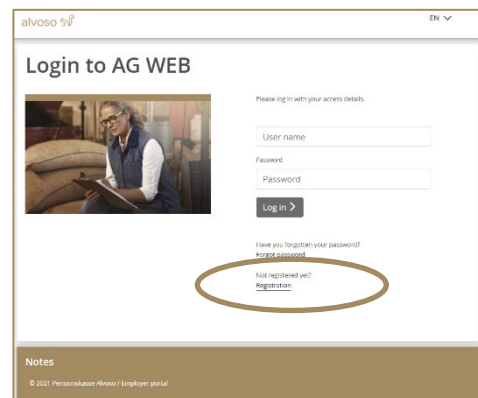
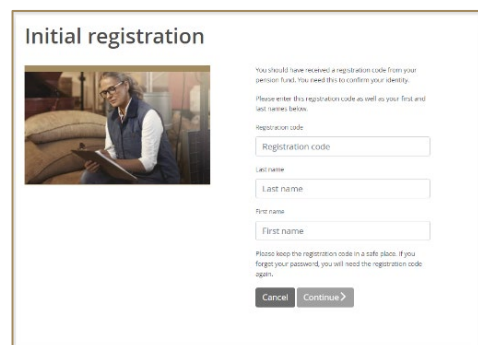
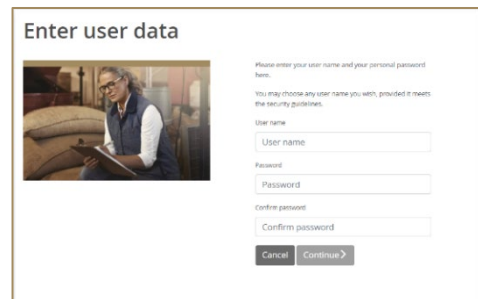
### First Use of the Portal

Please have the documentation you have received from us at the ready. Proceed to initial registration.

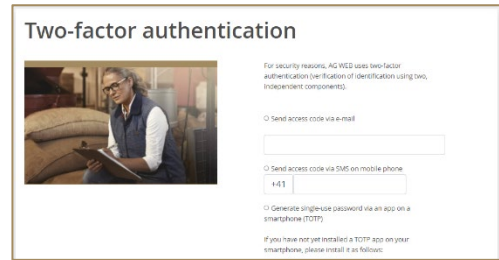
This initial registration will also be necessary for users who have already used an earlier version of our employer portal.

Please enter your registration code, family name and first name, as written on the activation message. It is essential to enter these three elements exactly, otherwise the system will not be able to recognise your registration.

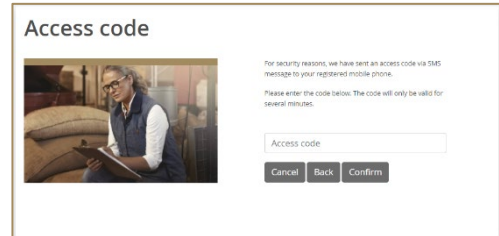
Your user name (minimum 4, maximum 20 characters) and password (minimum 8 characters, capital letters, minimum 1 number, minimum 1 special character) can be chosen freely.

For optimal functionality, enter your mobile number for "two-factor authentication". You will then receive an SMS message immediately. It is also possible to use a e-mail address, but please note that e-mails might also arrive in your spam folder. Experience has shown that there will be a slight delay whenever e-mails are sent, whereas SMS messages will reach you immediately.

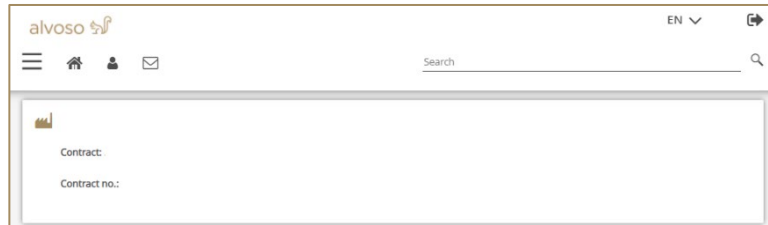


After you enter the access code sent to you, the "General Terms and Conditions" page opens. We would ask you kindly to accept them and, once this has been done, your new Alviso Employer Web portal will then be available for use.



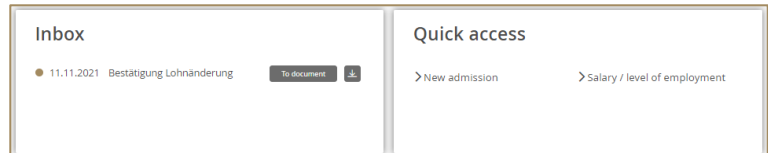
### New Overview

In the new Overview, you will see the name of your contact, the relevant contract name and contract number. In Main Navigation, you can change your personal settings (e.g. your mobile number or password).

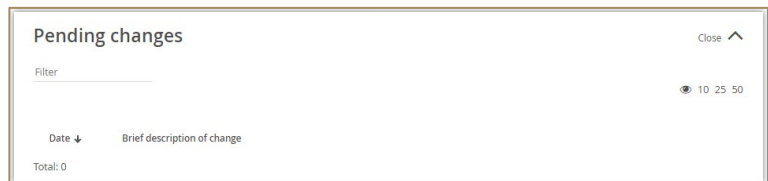


In Overview, you will see the most important data in the contract.

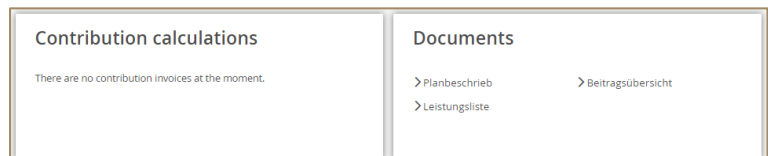
The new Inbox shows you the confirmation letters for any orders (already executed) that you have sent us. This function replaces delivery of these confirmations by post.



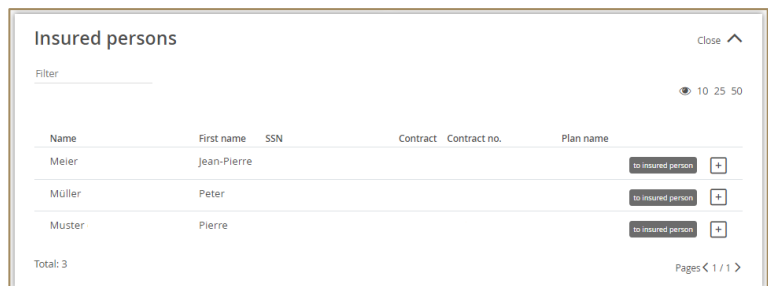
This overview shows the orders submitted by you to the administration via the employer portal and which are still waiting to be processed.



At the present time, contribution invoices are not yet being sent out to you electronically. For this reason, it is not possible to view it here.



In the overview of insured persons, you can call up the data for an individual insured and then issue any individual modifications to us directly.



Here you will be able to see an overview of the modifications processed.

The Infocentre gives you direct access to forms for processes that cannot be initiated via the employer portal.

### Possible Modifications

As usual, you can record whenever new employees join the company and then send this data to us for processing.

Changes to salary and employment levels can be processed and sent out, whether for individual persons or for the entire workforce.

For modifications en masse (e.g. annual wage adjustments), download the template (Excel) to your workstation, enter your data into the empty fields and then import the file back into the portal.

1	Family Name	First Name	Birth Date	AIW/AVS Number	Social Security Number	Reported Salary	Work Rate	New Salary	New Work Rate
2	Meier	Jean-Pierre	01.01.1985	64185101000		Fr. 75'000.00	100.00%		
3	Müller (Deutsch)	Pierre	01.01.1980	67180101000		Fr. 95'000.00	100.00%		
4	Muster (Test Fran)	Pierre	01.01.1980	67480101000		Fr. 85'000.00	80.00%		

Please enter the modification date and confirm each adjustment. This makes payroll reporting very simple and efficient.

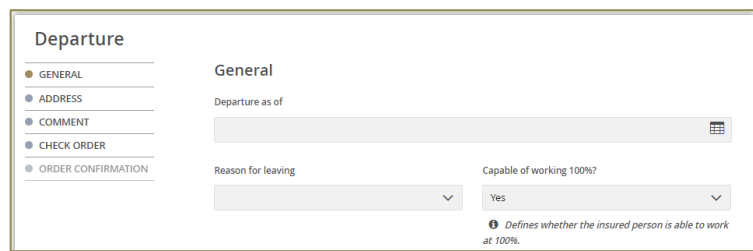
Changes of address, marital status, etc: please change the relevant personal data.

For companies with multiple pension plans, changes of plan can be sent to us.

For departures from the company, please note that the field "Reason for Leaving" is a mandatory field. Depending on the reason for leaving, various process steps need to be observed during processing within the administration. For example, possible continued insurance for an employee from the age of 55 onwards.



The screenshot shows the 'Change pension plan' form with the 'General' tab selected. The left sidebar contains a menu with 'CHANGE DATA' (selected), 'COMMENT', 'CHECK ORDER', and 'ORDER CONFIRMATION'. The main content area has the title 'General' and two input fields: 'Admission as at' with a calendar icon and 'Employer'.



The screenshot shows the 'Departure' form with the 'General' tab selected. The left sidebar contains a menu with 'GENERAL' (selected), 'ADDRESS', 'COMMENT', 'CHECK ORDER', and 'ORDER CONFIRMATION'. The main content area has the title 'General' and several fields: 'Departure as of' with a calendar icon, 'Reason for leaving' with a dropdown arrow, and 'Capable of working 100%' with a dropdown arrow showing 'Yes'. A small information icon is present next to the 'Capable of working 100%' field, with a tooltip that reads: 'Defines whether the insured person is able to work at 100%'.

Any questions?

Please do not hesitate to contact us.

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