

HOW TO REGISTER FOR PLANVIEWER

GETTING STARTED

HELP GUIDE

Use this step by step guide designed to help you get started.

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BEFORE YOU BEGIN

THINGS YOU WILL NEED

- **Your Fidelity reference number** (This is seven characters long and starts with a C, M N, P or the number 5. You can find it on any letter or statement you've received from us. If your reference number contains the character 0 or O, please enter the number zero 0)
- **Your National Insurance number or staff number** (You can find these on your payslip. Your National Insurance number will also appear on a P60 or tax letter.)
- **Access to your personal email**

GETTING STARTED



Go to planviewer.fidelity.co.uk

The screenshot shows a login form with the following elements:

- Log in** (Section Header)
- Username** (Label)
- Input field for Username
- Remember me
- Next** (Green Button)
- [Forgotten username?](#)
- [Register for PlanViewer](#)



Select **Register for PlanViewer**

This screenshot is identical to the previous one, but the [Register for PlanViewer](#) link is highlighted in blue.

Enter your details

The screenshot shows a registration form with the following elements:

- Progress indicator (Step 1 of 4)
- Step 1: Your personal details** (Section Header)
- Fidelity reference (Label)
- Input field for Fidelity reference
- First name(s) (Label)
- Input field for First name(s)
- Last name (Label)
- Input field for Last name
- Date of birth (DD-MM-YYYY) (Label)
- Input field for Date of birth
- National Insurance number (XX 45 87 40 X) (Label)
- Input field for National Insurance number
- I do not have a National Insurance number
- Continue** (Green Button)

You need to complete every field. If you don't have a National Insurance number, tick the box for **I do not have a National Insurance number** and you will be prompted to enter your staff number instead.

YOUR USERNAME



Click **Confirm**



Create your username and password

The screenshot shows a registration form with the following elements:

- Username:** A text input field.
- Password:** A text input field with a strength indicator.
- Password Conditions:** A list of requirements with checkmarks:
 - Must be 8-25 characters long
 - Must contain any three of the following:
 - lower case letters i.e. a-z
 - numbers i.e. 0-9
 - upper case letters i.e. A-Z
 - allowed symbols i.e. ! £ \$ * = [] { } @ # ?
- Re-enter password:** A text input field.
- Next:** A button at the bottom.

The username should be memorable to you. You can use your personal email address, if you like.

The password must be at least eight characters long and include three of the following: lowercase letters, uppercase letters, numbers, or any of these symbols:

! £ \$ * = [] { } @ # ?

Keep your username and password safe as you will need them to log into your account.

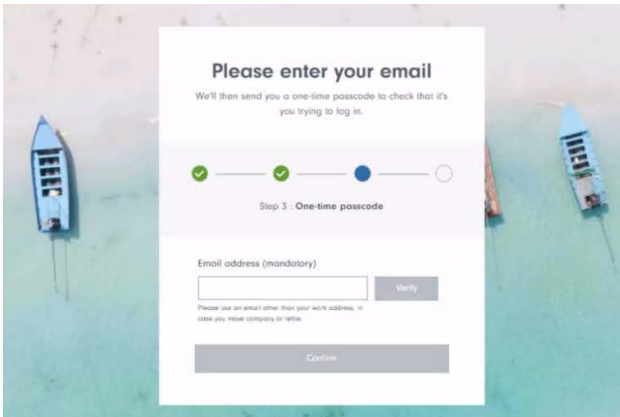
Click **Next**



VERIFY YOUR EMAIL ADDRESS



Enter your email address



This should be different from your work email address in case you leave the company or retire.



Click **Verify**



Check your email inbox for the one-time passcode we will send you

Your passcode is: 209373 This was requested on 12/06/2024 at 11:44 AM.
If you have not tried to log in recently, please call us on 0800 3 68 68 68.
Yours sincerely,
The Fidelity team
This is an automated message. Please do not reply to this email address.

Our email will come from **Fidelitysecurity@fidelity.co.uk**. If it isn't in your inbox, you may need to check your junk or spam folders.

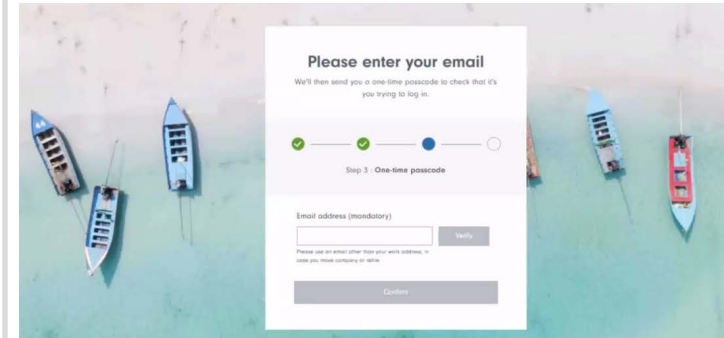
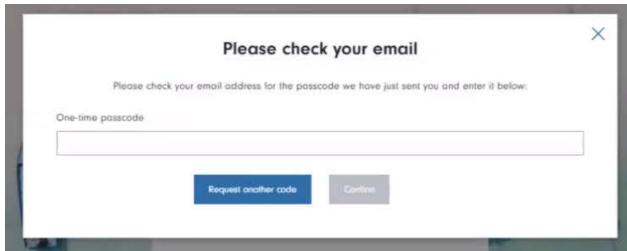
VERIFY YOUR EMAIL ADDRESS (CONTINUED)



Enter the one-time passcode

Click **Confirm**

Click **Confirm** again

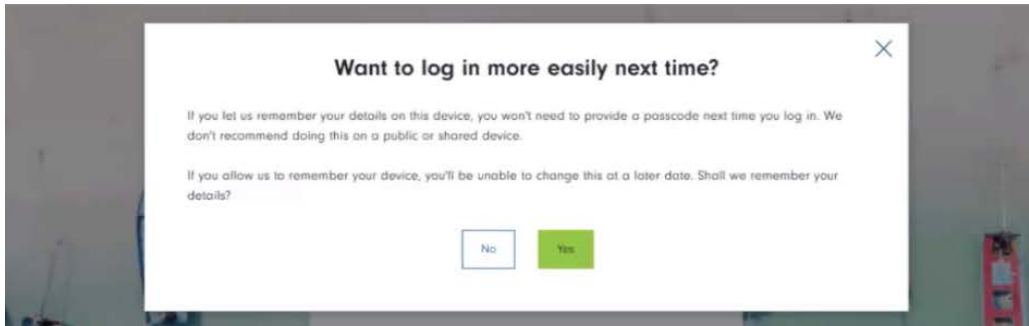


You can also verify your mobile phone number if you like, but this is optional. Please make sure you select the correct international dialing code as we will send you a text message containing a one-time passcode.

CONFIRMATION

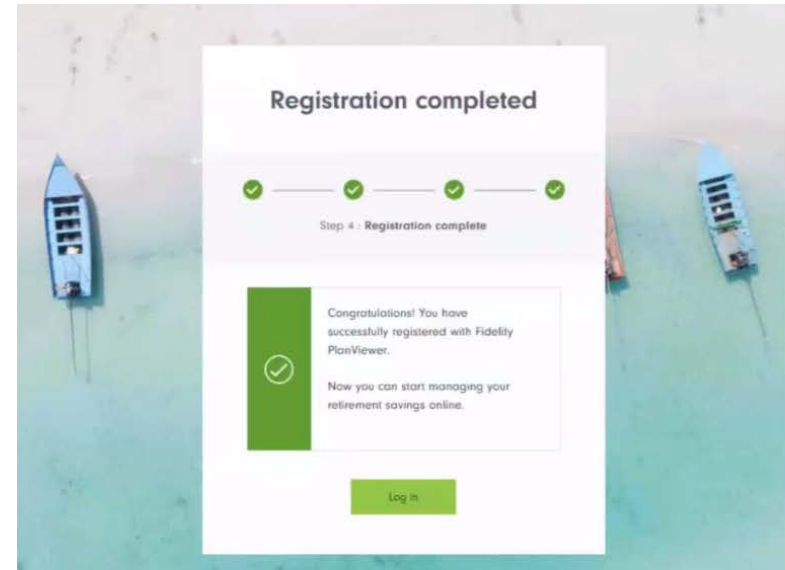


Choose **Yes** or **No** to store details of your device



A pop-up box will appear asking for your permission to recognise your computer, phone, or tablet when you log in. If you select 'Yes', we will remember your device the next time you log in. Only do this if you are using your own device rather than one in a public area.

Confirmation and next steps



Your registration is now complete. To go to your account, select **Log in**.

How to register for PlanViewer

THANK YOU

We hope you found it useful.

If you need help with another journey, you can find our other guides on our website.

