

HOW TO FIND  
YOUR USERNAME

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GETTING STARTED

HELP GUIDE

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

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# BEFORE YOU BEGIN

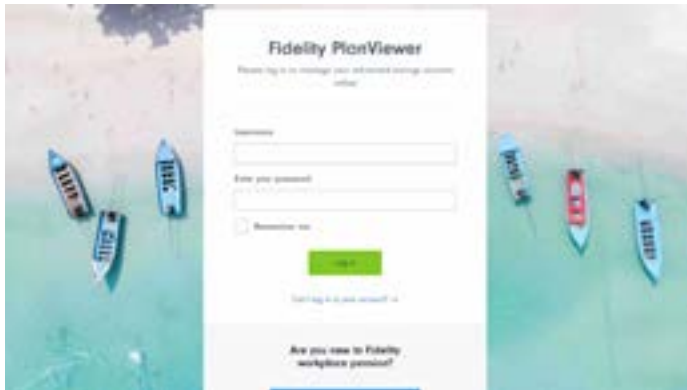
## THINGS YOU WILL NEED

- **Your Fidelity reference number** (This is seven characters long and starts with a C, M or 5. You can find it on any letter or statement you've received from us.)
- **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



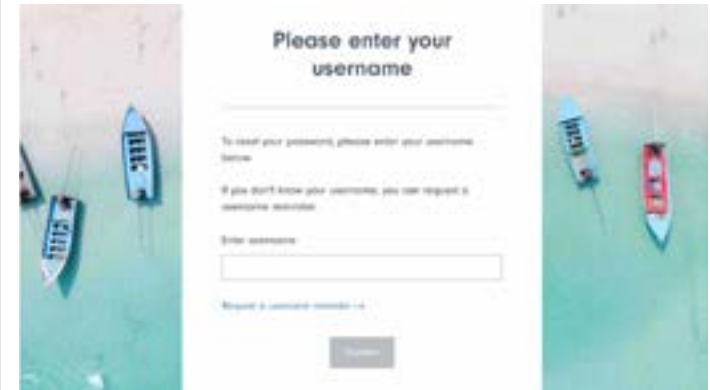
Go to [planviewer.fidelity.co.uk](https://planviewer.fidelity.co.uk)



Select **Can't log in to your account?**

Can't log in to your account? →

Select **Request a username reminder**



## CHECKING IT'S YOU



Enter your details

A screenshot of a registration form. The form has a light blue background with a boat image. It contains the following fields: 'Public reference', 'Full name(s)', 'Last name', 'Date of birth (DD MM YYYY)', and 'National Insurance number (XX XX XX XX)'. There is a checkbox labeled 'I do not have a National Insurance number' and a green 'Confirm' button at the bottom.

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.



Click **Confirm**



Have you set up security questions?

A screenshot of a security check dialog box. The title is 'We need to check it's you'. Below the title, it says 'We need to run a quick security check before you can be reminded of your login details'. There are two radio button options: 'Use a one-time passcode' and 'Answer your security questions'. A 'Choose' button is at the bottom.

If you are using an unrecognised device, we need to run a quick security check.

You can ask us to send you a one-time passcode. Or you can answer the security questions you may have set up in the past.

Click **Choose**.

## YOUR USERNAME REMINDER



Answer your security questions



If you have logged into your account before, you will have security questions set up.

Enter your answers and click on **Confirm**.



Or receive a one-time passcode



If you have asked for a one-time passcode, check your email or phone.

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.

Enter it in the box and click on **Submit**.

Your username appears



Keep your username safe as you will need it to log into your account.

If you don't know your password, you should click **Reset Password**. If you do, click **Log In**.

## How to find your username

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# THANK YOU

We hope you found this guide useful.

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

