

SecureShare - User Guide



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1. What is the SecureShare Portal?

The SecureShare Portal is a new platform which will allow you to share your employee's data with confidence and ease using our ultra secure, intuitive system.

As your trusted partner in creating and delivering employee benefits, Irish Life have simplified and improved the process of sharing employee data with us. SecureShare Portal allows you to share employee data with confidence and ease. Use SecureShare Portal instead of encrypted email or secure file transfers to share your pension plan and risk data with Irish Life.

Benefits of the SecureShare Portal include:

- **One stop shop for data sharing** - Track and manage all your data sharing needs in one place. History of all your data sharing activity held on the portal.
- **Secure** – Creates a secure link between us for data sharing, using multifactor identity and access management (IAM). No need to password protect the files you submit.
- **Simple to use** – SecureShare is an intuitive interface and system.

There is information on data security and where data is stored at the end of this document.



2. How do I become a registered user?

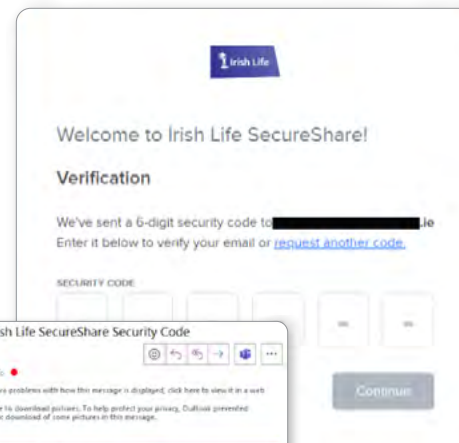
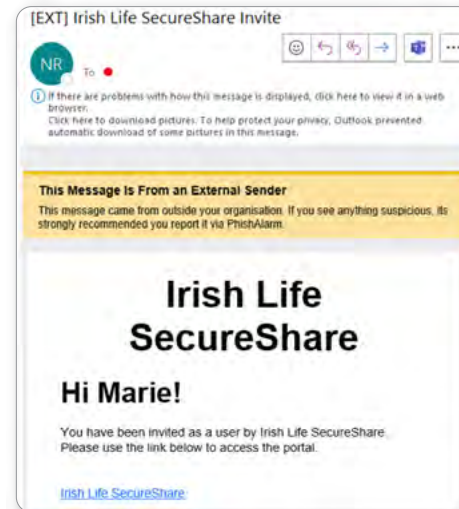
You should have received an invitation to register for SecureShare from no-reply@cbscomms.irishlife.ie. This invitation contains an activation link from which you can complete your registration.

If you have not received an invitation to register, or want the invitation to be sent to another person in your company, please email SecureShareSupport@irishlife.ie providing your company name, scheme number and the first name, surname and email address of the person to be registered.

When you click the activation link you will be brought to the SecureShare Portal and asked to provide your email address.

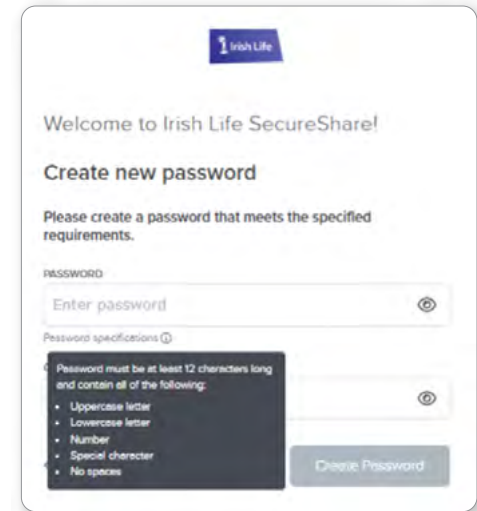
You will then be asked to enter a one-time passcode to verify that the email address entered matches the one on our records.

Your passcode will be sent to your email account. Once you enter the code you can continue on to the next step of the registration process.



Finally, you will be asked to set and confirm a password. The password must be 12 characters in length and contain at least 1 upper case letter, 1 number and 1 special character.

Congratulations! You have now completed your registration and are ready to login to SecureShare.



Logging In

You can access SecureShare using the link that was sent to you when you registered. If you have misplaced your link, the system can be accessed here:

[Irish Life SecureShare](#)

Once the initial registration process has been completed, all you will need is to enter the correct email address and password combination to log in. This will cause a one-time passcode to be sent to your email address.

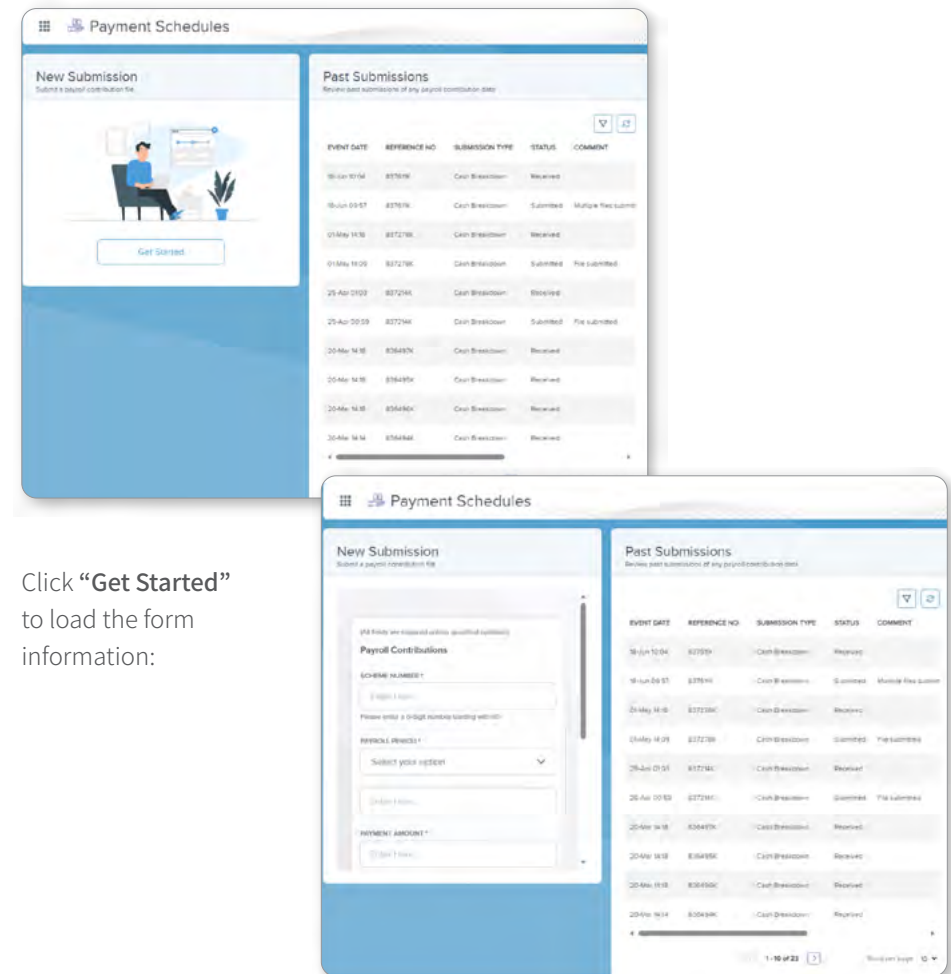
Entering the 6-digit Security Code received via email and clicking "Continue" will bring you to the main application. Clicking the "Back" option will return you to the Login Screen.

3. What can I do on the SecureShare Portal?

When you login to the SecureShare Portal, you will land on your organisation's dashboard. Here you will see all your data sharing options in one place.



Clicking any of the tiles under the heading “What would you like to do?” will bring you to a screen describing the process on the left and showing the past submissions.



4. What files can I submit through the SecureShare Portal?

Please use the scheme or member number associated with your submission with each update. You will not be able to update for schemes you have not been registered for. Any field on the SecureShare Portal with an * is mandatory. The table below outlines the files you can submit using SecureShare.

Process requirement	Type of data requirement	When and how
Payment Schedules	For Electronic Fund Transfers (EFT) or As an instruction to collect a direct debit	Monthly – Use the Payment Schedules tile to upload your contribution schedules / breakdowns.
Pension Renewal		Use the Pension Renewal tile to select from 2 options
	Annual Renewal Data	Update per the template each year
	Annual Report Questionnaire (where applicable)	Update as per the template each year
Adding new Members		Use the Add Members tile to select from 2 options
	Bulk Add Members	As Members join using all relevant data
	Add Individual Member	Individually by spreadsheet or by form. Note: If you use Pension Planet Interactive (PPI) to add Members you can continue to do so
Updating Members details		Use the update members tile to select from 7 options
	Bulk Member Updates - Upload updated information for Multiple Members in a single file	If there is a mid-year update (i.e., not at renewal) of data required. Some examples include updating leavers, addresses, mobile numbers, salary, marital status, increase/decrease contributions etc.
	Individual Member Update	As above
	Bulk Member Funding Rates - Upload Contribution rates for Multiple Members in a single file	If the projections on the scheme use funding rates and you currently submit contribution changes files

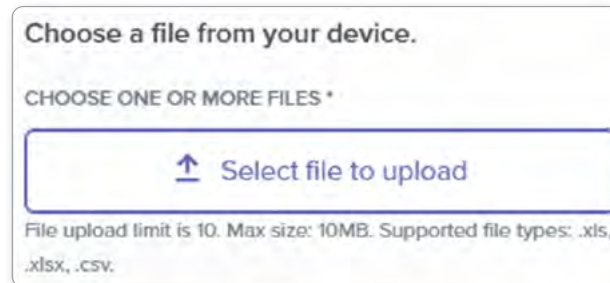
Process requirement	Type of data requirement	When and how
	Individual Member Funding Rate	As above
	Bulk Member Address Updates - Upload e mail/ addresses for Multiple Members in a single file	As required for paperless communications etc
	Bulk Member Salary Updates - Upload Salaries for Multiple Members in a single file	If required mid-year
	Bulk Member Payroll Numbers – Upload payroll numbers for Multiple Members in a single file	As required
Group Risk Schemes		Use the Group Risk Schemes tile if you have a separate risk plan you can select from 4 options.
	Annual Risk Renewal Data	Update as per the template each year
	Underwriting	
	Existing Income Protection Claim	
	New Income Protection Claim	

5. How can I submit files on the SecureShare Portal?

Most of the tasks within the SecureShare Portal will ask for a scheme and / or member number to assist in validating the submission and ensure it is channelled correctly when it reaches Irish Life. For example, when using the Payment Schedules option, the system will ask specific questions like what the 'month in respect of' is, i.e., January 2024. There is also an option to enter notes you think will help clarify your submission, if needed.


The section to select the file or files you wish to upload shows the type of files that are acceptable. It also explains the maximum number of files and file size limits.

For example, on the single new entrant section the only option is a .pdf type file. The Bulk Add Members will allow .xls(s) and csv type files. Clicking the **"Select File to Upload"** button brings you to a browser window where you can select up to 10 files with a maximum size of 10 Megabytes.



Choose a file from your device.

CHOOSE ONE OR MORE FILES *

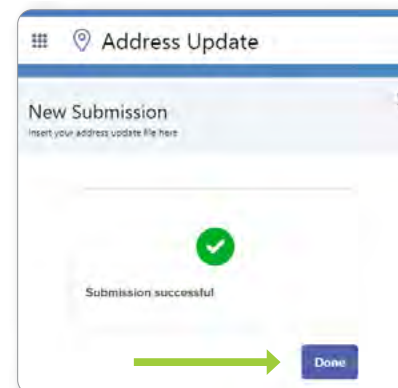
 Select file to upload

File upload limit is 10. Max size: 10MB. Supported file types: .xls, .xlsx, .csv.

It is good practice to use a meaningful name for each file. This will help you locate the submission later if you have any questions. You must then click the **"Submit"** button which will confirm if the details you have entered are valid. If not, the fields that failed will show as errors for correction.

A typical error is when the scheme number entered is invalid. Either in format or because it is not a scheme or member that belongs to your organisation. If you get an error message, please check that the mandatory details have been filled in, any key data like a scheme number is correct and that the file format matches the allowable types. Once all values are correct and you have pressed **"Submit"** the file is then prepared and sent to Irish Life. You will get a confirmation screen with a green check mark.


Please note: The actual contents of the file are not validated at this point, only the data required on the submission form is checked.




Address Update

New Submission

Insert your Address update file here



Submission successful

 Done

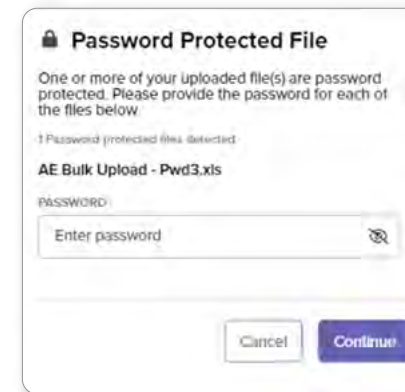


6. Password Protected Files

We take the security of your data very seriously. Once logged in to SecureShare you are within a **completely secure environment**. Any files uploaded are fully protected so there is no need for password protection. Once downloaded by an Irish Life administrator your file is no longer stored within the SecureShare Portal.

SecureShare will allow you to upload password protected files:

- SecureShare will automatically detect and prompt you to enter the password for the protected file.
- You will see this message on your screen:
- SecureShare will automatically leverage the password you provide to unlock the file for further document processing.

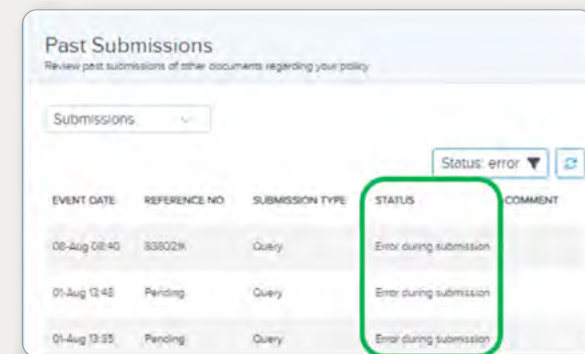


7. How can I validate my submission?

The entry that you have just processed will appear at the top of the “**Past Submissions**” panel on the right and will be highlighted in blue. Here you can see the date the item was submitted, the person who submitted it, the file name, and status details.

Be sure to check the “**status**” column. In the unlikely event that there is a problem on the transmission an error message will appear in that column.

This would only happen if the system that is receiving the file is temporarily unavailable due to an unforeseen technical issue. If you notice an error message, please wait a few minutes and resubmit your file. Failure to check that the submission succeeded may result in an assumption that Irish Life have received a file when we have not.



Past Submissions
Review past submissions of any new members

Submissions: [v]

3 → 25-Sep 09:49 838220K Bulk Add Members Completed Test blank f

2 → 25-Sep 09:24 838220K Bulk Add Members

1 → 25-Sep 09:15 838220K Bulk Add Members

Past Submissions
Review past submissions of any payroll contribution data

EVENT DATE	REFERENCE NO	SUBMISSION TYPE	STATUS	COM
02-Oct 17:31	835505K	Cash Breakdown	Submitted	File s
20-Sep 15:22	USHUR_VARIABLE	USHUR_VARIABLE	Submitted	File s
14-Sep 17:01	USHUR_VARIABLE	USHUR_VARIABLE	Submitted	File s
12-Sep 11:28	USHUR_VARIABLE	USHUR_VARIABLE	Submitted	File s

Past Submissions
Review past submissions of other documents regarding your policy

My Org: Irish ...

IN TYPE	STATUS	COMMENT	SUBMITTED FILES	SUBMITTED BY
Received			25-09-2024 20:32 Microsoft Lens	kevin.sullivan@irishlife.ie
Submitted	File submitted		28-09-2024 20:32 Microsoft Lens	kevin.sullivan@irishlife.ie
Received		None		imelda.shore@irishlife.ie
Submitted	Query submitted	None		imelda.shore@irishlife.ie
Received		None		imelda.shore@irishlife.ie
Submitted	Query submitted	None		imelda.shore@irishlife.ie
Received		None		imelda.shore@irishlife.ie
Submitted	Query submitted	None		imelda.shore@irishlife.ie
Received		None		imelda.shore@irishlife.ie
Submitted	Query submitted	None		imelda.shore@irishlife.ie

1 - 10 of 569

10 items per page

In this example:
My Organisation has been selected
All of the submissions by users in My Organisation displayed
Total number of submissions for My Organisation is 569

Submission Status - When a submission has been made:

The **Past Submissions** table will help you track the status of your submission. In the example below we can see three entries for Bulk Add Members with an Event Date of 25-Sep:

Entry 1: When the file has been submitted.

Entry 2: When the file has been received.

Entry 3: When the file has been completed.

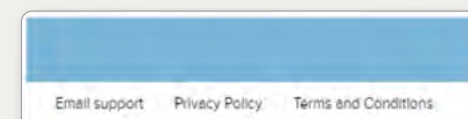
All three entries have the same Reference No.

The display automatically defaults to the most recent 10 items submitted but you can choose to show up to 25 items at a time and scroll down through the list to see more details.

The list only shows the items for the selected workflow and not all items across all workflows. So if you are in the Payment Schedules workflow, you won't be able to see past submissions for the Update Members workflow.

If a person is set up as an administration user for your organisation, they will be able to see the past submissions of everyone in their organisation.

Please note that it is not possible to see the content of the files that have been submitted. They are not held on the SecureShare Portal once they have been received by Irish Life. If you have any queries or concerns, you can click the Email Support link on the lower left corner of the screen. It will create an email for you to send to: SecureShareSupport@Irishlife.ie.



8. Past Submission Table - Sort and Filter

a) Single Column Sort

Click column header to sort data in ascending or descending order.

Click the refresh button in the Past Submissions table to clear the selected sort.

Refresh Button

EVENT DATE	REFERENCE NO	SUBMISSION TYPE	STATUS	COMMENT
06-Aug 17:17	837980K	Application Form (Single - New Join)	Received	
06-Aug 16:25	837979K	Cash Breakdowns - Cash or Direct	Submitted	File submitted
06-Aug 16:32	837979K	Cash Breakdowns - Cash or Direct	Received	
06-Aug 16:20	837978K	Superannuation Docs	Submitted	File submitted
06-Aug 16:28	837978K	Superannuation Docs	Received	
06-Aug 16:19	837977K	Superannuation Docs	Submitted	File submitted
06-Aug 16:28	837977K	Superannuation Docs	Received	
06-Aug 16:17	837976K	Query	Submitted	File submitted
06-Aug 16:20	837976K	Query	Received	
06-Aug 16:16	837975K	Query	Submitted	File submitted

The submissions in this example are sorted by reference No.

b) Single Column Filter

Click the filter button to open the Filter Dialog Box

Select which column you want to filter

E.G. Reference No (this is the Midas No) and enter Midas No

The filtered list will be displayed

Click Refresh to clear filter

EVENT DATE	REFERENCE NO	SUBMISSION TYPE	STATUS	COMMENT	SUBMITTER
30-Aug 12:29	838204K	Query	Received		None
30-Aug 12:31	838204K	Query	Submitted	Query submitted	None

9. System Requirements

SecureShare is optimised for the following internet browsers:



Microsoft Internet Explorer(Edge)
Version 118.0.2088.61 or higher



Google Chrome
Version 118.0.599389 or higher



Firefox:
Version 119.0 or higher

Required system configurations

- iframe supported from user's network.
- Websockets are unblocked.
- Javascript should be enabled.

If you encounter any difficulties using SecureShare, you can contact:

SecureShareSupport@irishlife.ie

While SecureShare may be accessible from other browser or operating systems, we can't guarantee that all features will work correctly.

10. Best-in-class Data Protection

At a time when data security is more important than ever before, the SecureShare Portal offers enhanced data protection through a combination of encryption, Multi Factor Authentication (MFA), Identity Access Management (IAM) protocols, a managed Identity Provider Solution (IPS) and a carefully devised system of tailored workflows with restricted portfolios and automatic timeouts. A combination of MFA and IAM protocols ensure enhanced protection during login. A managed IPS provides full password user policies and user credential storage. Transmission of data and data files is managed through secure encrypted channels. Workflows are role based with access tailored to suit the end user's organisational profile and is restricted to their own portfolios. Sessions are also set to automatically timeout after a prescribed period of inactivity.



11. Member Data Processing

Where and how is my plan member's data stored in the exchange process?

Uploaded files are hosted temporarily for validation within the EU with Amazon Web Services (AWS) in a customer specific virtual cloud with Web Application Firewall protection in place. The AWS Region Instance is in Ireland so personal information will not be shared outside Ireland. Files will then be downloaded to Irish Life's internal work management system and deleted from temporary storage.

For more information in relation to data or cyber security on the SecureShare Portal please email:

SecureShareSupport@irishlife.ie

12. Additional Information

On the lower left margin of the application there is a footer with 3 items.

Email support | Privacy Policy | Terms and Conditions

1. **Email support:** Clicking [here](#) creates an e-mail to the SecureShare Support Mailbox.
2. **Privacy Policy:** Clicking [here](#) connects to the Irish Life privacy policy.
3. **Terms & Conditions:** Clicking [here](#) connects to the terms and conditions governing the use of the system. You will also find a link to the Web Use Policy on this page.



Email SecureShareSupport@irishlife.ie

Website www.irishlifeemployersolutions.ie

Write to Irish Life, Irish Life Centre, Lower Abbey Street, Dublin 1.

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