

For financial advisers only

GUIDE

# Process guide:

## Modular iSIPP: secure messaging

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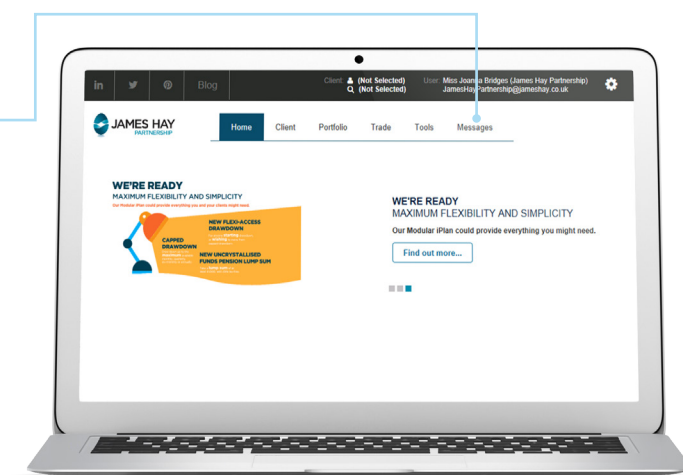
## Secure messaging

Secure messaging allows for the passing of information between James Hay Partnership and advisers/clients. The secure nature of the messaging service offers complete peace of mind and removes the need to encrypt sensitive data when emailing directly. It also allows us to ensure your queries are directed to the appropriate department or individual(s).

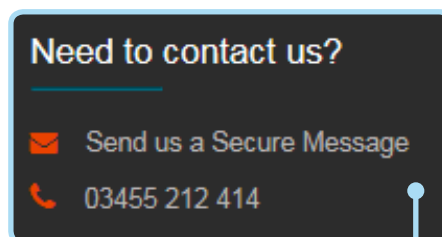
To access the secure messaging service, firstly log into James Hay Online. If you do not have your login details, please call your Account Executive team on 03455 212 414.

Once logged in, select the **Messages** tab at the top of the page.

Alternatively, any secure messages sent from us that require your attention will appear in the **Requiring Attention** table on your home page.



Requiring Attention		
Your trades awaiting authorisation		4
Secure messages for review		58
Cross client analysis in progress		0
Bulk orders in progress		0



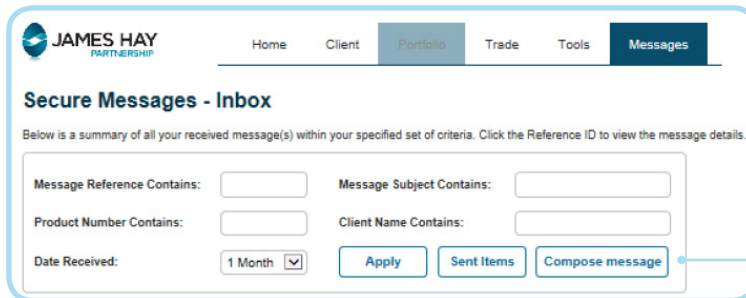
There's also a quick link to the **Compose a Secure Message** function found at the bottom of your home page, along with our contact number.

When a secure message is received, it will trigger an email to your inbox, alerting you that there is a new secure message to view once logged in to James Hay Online.

## Sending a secure message

Follow the steps outlined above to login and access the secure messaging service.

When using the **Messages** tab at the top of the page or the **Requiring Attention** table, you'll be redirected to your secure inbox. Select **Compose Message** from there.



**JAMES HAY PARTNERSHIP** Home Client Portfolio Trade Tools Messages

### Secure Messages - Inbox

Below is a summary of all your received message(s) within your specified set of criteria. Click the Reference ID to view the message details.

Message Reference Contains:  Message Subject Contains:

Product Number Contains:  Client Name Contains:

Date Received: 1 Month



Only PDF, Word, and Excel documents can be attached to a secure message.

Word and Excel documents will be converted to a PDF upon receipt.

Maximum doc size that can be received is 4MB

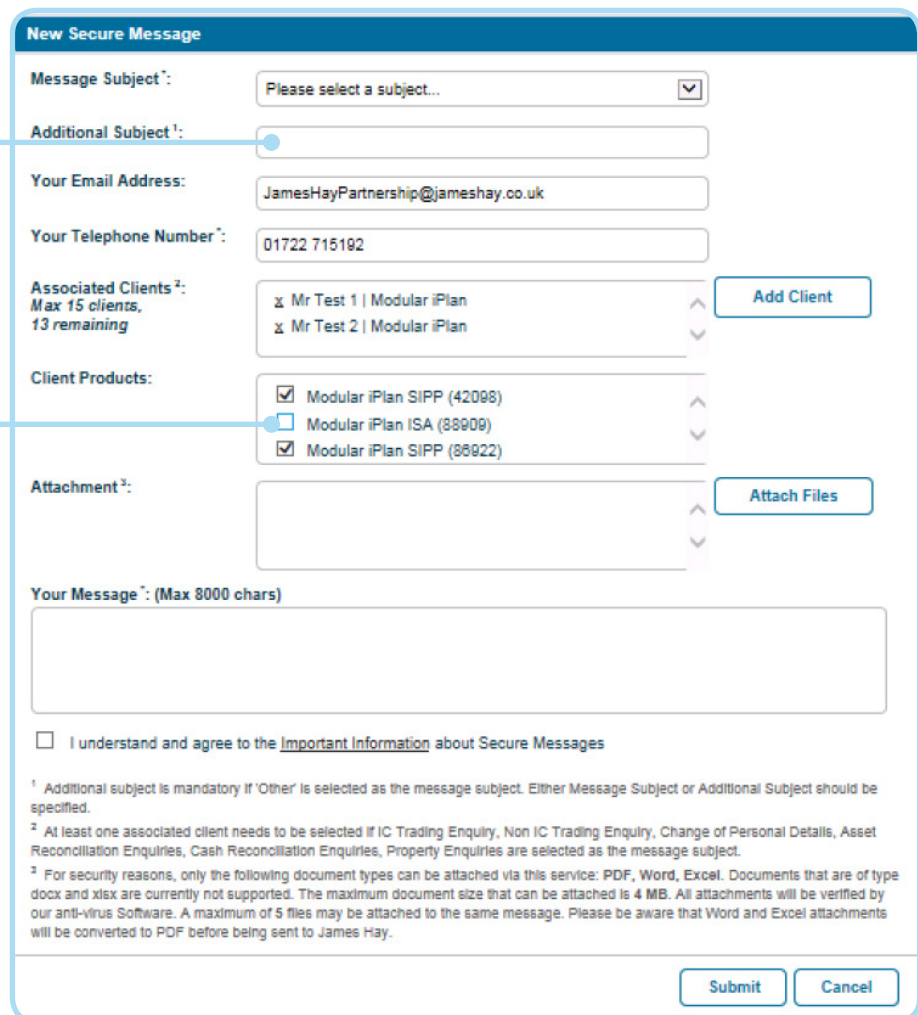
Choose a subject from the list of common themes or choose Other and provide an additional subject.

Select the **Add Client** icon and search for the client to whom the query relates. Multiple clients can also be selected.

Remove any client products which are not relevant to the query by un-ticking the associated box under **Client Products**.

Attach any relevant documentation.

Confirm you understand and agree to the important information about secure messaging (document available via the link), and **Submit**.



**New Secure Message**

Message Subject<sup>1</sup>:

Additional Subject<sup>1</sup>:

Your Email Address:

Your Telephone Number<sup>2</sup>:

Associated Clients<sup>2</sup>:  Mr Test 1 | Modular iPlan  Mr Test 2 | Modular iPlan

Client Products:  Modular iPlan SIPP (42098)  Modular iPlan ISA (88909)  Modular iPlan SIPP (88922)

Attachment<sup>3</sup>:

Your Message<sup>3</sup>: (Max 8000 chars)

I understand and agree to the [Important Information](#) about Secure Messages

<sup>1</sup> Additional subject is mandatory if 'Other' is selected as the message subject. Either Message Subject or Additional Subject should be specified.  
<sup>2</sup> At least one associated client needs to be selected if IC Trading Enquiry, Non IC Trading Enquiry, Change of Personal Details, Asset Reconciliation Enquiries, Cash Reconciliation Enquiries, Property Enquiries are selected as the message subject.  
<sup>3</sup> For security reasons, only the following document types can be attached via this service: PDF, Word, Excel. Documents that are of type docx and xlsx are currently not supported. The maximum document size that can be attached is 4 MB. All attachments will be verified by our anti-virus Software. A maximum of 5 files may be attached to the same message. Please be aware that Word and Excel attachments will be converted to PDF before being sent to James Hay.

## Receiving secure messages

Whenever a secure message is sent by James Hay Partnership for the attention of an adviser or client, an email will be sent to their inbox alerting them that their secure messaging inbox contains a new message. Advisers and clients are then asked to log in and view the message online.



If searching by date received with your Secure Inbox, date ranges can be customised. Simply select custom from the Date Received drop down.

The secure inbox can be accessed via the **Requiring Attention** table on the home screen or alternatively, via the **Messages** tab.

Messages will automatically appear in chronological order, with the newest being at the top of the inbox. However, the messages can be sorted according to the various column headers.

Messages can be searched for by **product number, client name, keywords and subject**.

To view a message, select the reference on the left side of the page.

Messages can then be replied to, deleted, or printed using the icons on the right side of the table.

**JAMES HAY** PARTNERSHIP

Home Client Portfolio Trade Tools **Messages** [How to Log In](#)

### Secure Messages - Inbox

Below is a summary of all your received message(s) within your specified set of criteria. Click the Reference ID to view the message details.

Message Reference Contains:  Message Subject Contains:   
Product Number Contains:  Client Name Contains:   
Date Received:  1 Month

Show 10 messages per page Search:

Reference	Date Received	Subject	Date Read	Client List	Has Attachment	
456873	15/07/2015 00:13	Trade Order Receipt Reference for plan	15/07/2015 12:51	Mr T Two   Modular Plan	✓	<a href="#">Print</a> <a href="#">Delete</a>
456790	14/07/2015 19:19	Other - Cash Balance Alert		Mr Test 1   Modular Plan		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456702	14/07/2015 19:18	Other - Cash Balance Alert		Mr Test Four   Modular Plan		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456652	14/07/2015 13:56	Other - Model Portfolio Rebalance Reminder		Mr Test 2		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456001	14/07/2015 12:57	Client added to the model portfolio	15/07/2015 12:52	Mr Test 2		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456492	13/07/2015 19:29	Other - Cash Balance Alert		Mr Test Four   Modular Plan		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456233	10/07/2015 19:38	Other - Cash Balance Alert		Mr Test Four   Modular Plan		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
456042	10/07/2015 10:55	Trade Order Receipt Reference for plan		Mr T Three	✓	<a href="#">Print</a> <a href="#">Delete</a>
456005	09/07/2015 10:22	Other - Cash Balance Alert		Mr Test Four   Modular Plan		<a href="#">Print</a> <a href="#">Delete</a> <a href="#">Reply</a>
455881	05/07/2015 11:33	Trade Order Receipt Reference for plan		Mr T 1   Modular Plan	✓	<a href="#">Print</a> <a href="#">Delete</a>

Displaying a total of 35 messages. Showing (1 to 10) [First](#) [Previous](#) [1](#) [2](#) [3](#) [4](#) [Next](#) [Last](#)

# Contact us

If you have any questions or would like to discuss your application, please call your Account Executive Team or general enquiry number on **03455 212 414** or email **[jameshayonlineteam@jameshay.co.uk](mailto:jameshayonlineteam@jameshay.co.uk)**

Contact details:



**03455 212 414**



**[jameshayonlineteam@jameshay.co.uk](mailto:jameshayonlineteam@jameshay.co.uk)**

James Hay Partnership is the trading name of James Hay Insurance Company Limited (JHIC) (registered in Jersey number 77318); IPS Pensions Limited (IPS) (registered in England number 2601833); James Hay Administration Company Limited (JHAC) (registered in England number 4068398); James Hay Pension Trustees Limited (JHPT) (registered in England number 1435887); James Hay Wrap Managers Limited (JHWM) (registered in England number 4773695); James Hay Wrap Nominee Company Limited (JHWNC) (registered in England number 7259308); PAL Trustees Limited (PAL) (registered in England number 1666419); Santhouse Pensioner Trustee Company Limited (SPTCL) (registered in England number 1670940); Sarum Trustees Limited (SarumTL) (registered in England number 1003681); Sealgrove Trustees Limited (STL) (registered in England number 1444964); The IPS Partnership Plc (IPS Plc) (registered in England number 1458445); Union Pension Trustees Limited (UPT) (registered in England number 2634371) and Union Pensions Trustees (London) Limited (UPTL) (registered in England number 1739546). JHIC has its registered office at 3rd Floor, 37 Esplanade, St Helier, Jersey, JE2 3QA. IPS, JHAC, JHPT, JHWM, JHWNC, SPTCL, SarumTL and IPS Plc have their registered office at Trinity House, Buckingham Business Park, Anderson Road, Swavesey, Cambs CB24 4UQ. PAL, STL, UPT and UPTL have their registered office at Dunn's House, St Paul's Road, Salisbury, SP2 7BF. JHIC is regulated by the Jersey Financial Services Commission and JHAC, JHWM, IPS and IPS Plc are authorised and regulated by the Financial Conduct Authority. The provision of Small Self Administered Schemes (SSAS) and trustee and/or administration services for SSAS are not regulated by the FCA. Therefore, IPS and IPS Plc are not regulated by the FCA in relation to these schemes or services.(01/14)

[www.jameshay.co.uk](http://www.jameshay.co.uk)