



Portal User Guide

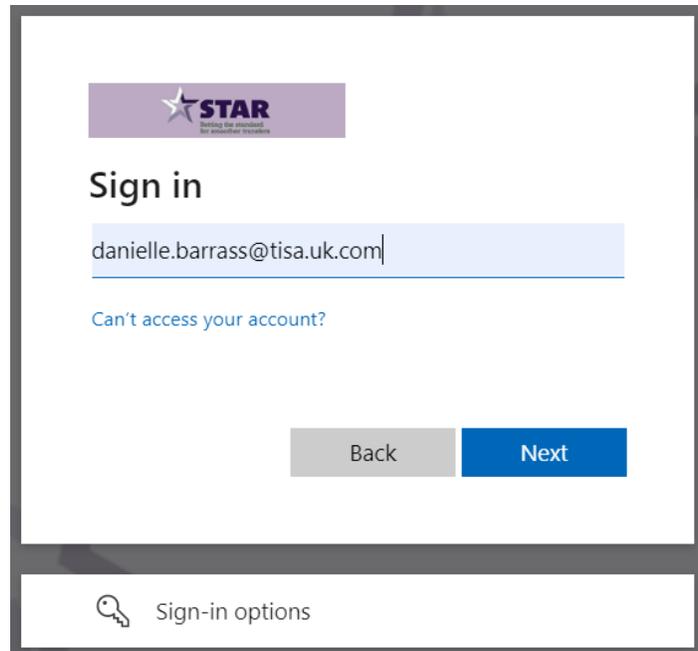
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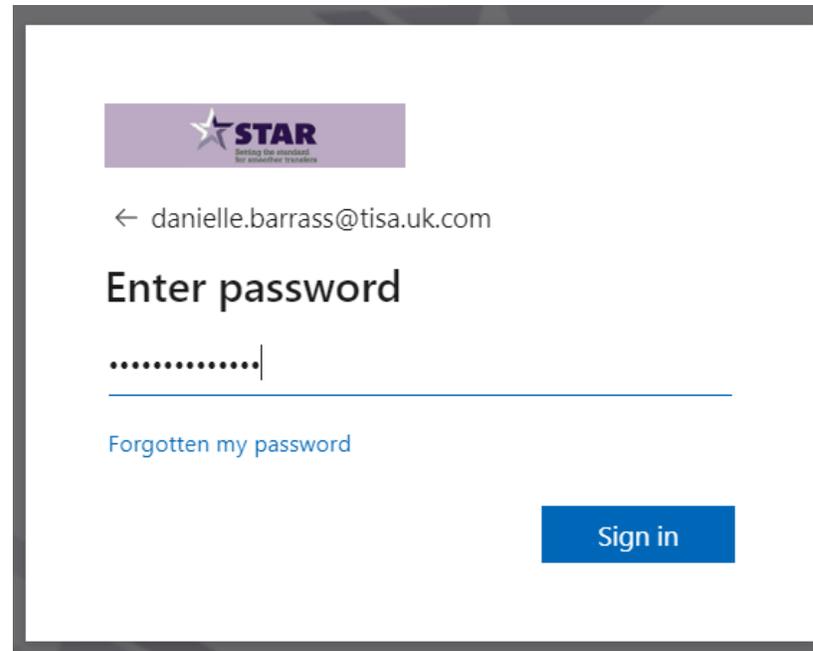


Logging In

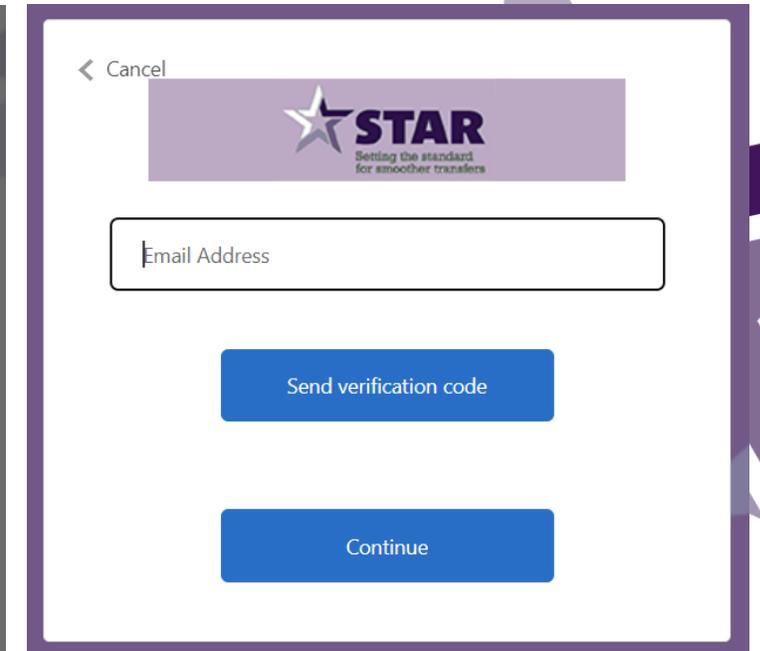
- ★ Test Members Portal access: <https://portal.joinstar.co.uk/>
- ★ Access to the Portal is linked to your Microsoft Office 365 account. Please ensure you use your corporate login details. An authentication email with a one time code will be sent to your email account.
- ★ For added security, we have introduced two factor authentication (2FA), which will be required each login. Please follow the onscreen instructions to set-up using your mobile number, every login you will be sent a verification code to access.



The screenshot shows the STAR Sign in page. At the top left is the STAR logo with the tagline "Setting the standard for smoother transfers". Below the logo is the text "Sign in". A text input field contains the email address "danielle.barrass@tisa.uk.com". Below the input field is a link that says "Can't access your account?". At the bottom of the form are two buttons: "Back" and "Next". At the bottom of the page, there is a "Sign-in options" link with a key icon.



The screenshot shows the STAR Enter password page. At the top left is the STAR logo with the tagline "Setting the standard for smoother transfers". Below the logo is a back arrow and the email address "danielle.barrass@tisa.uk.com". The main heading is "Enter password". Below this is a password input field with masked characters ".....". Below the password field is a link that says "Forgotten my password". At the bottom right of the form is a blue "Sign in" button.



The screenshot shows the STAR verification code page. At the top left is a back arrow and the text "Cancel". Below this is the STAR logo with the tagline "Setting the standard for smoother transfers". Below the logo is an "Email Address" input field. Below the input field are two blue buttons: "Send verification code" and "Continue".

- 2 Home
- MI Submissions
- MI Data Analysis
- Contact Details
- Private Documents
- Shared Documents
- User Registration

3 STAR TEST 1 <

Products Contacts

S

STAR TEST 1
S9999

4 ISA/GIA
S9999z01,S9999y01

PSS
s9999x01

9 ST STAR TEST 1

Welcome to the STAR portal

Please email enquiries@joinstar.co.uk if you require any assistance.

5 Submit MI data User Guide 6

7 Submissions Not Yet Received

PERIOD	PRODUCT(S)
November 2021	GIA, ISA, Personal Pension

8 Recently Received

PERIOD	PRODUCT	SUBMITTED
October 2021	GIA, ISA, Personal Pension	25 Nov by Danielle Barrass
October 2021	GIA, ISA, Personal Pension	15 Nov by Charles Southey

1. User information and sign out.
2. Location indicator.
3. Organisation information
4. Organisation/brand/product SLA details. The reference below your organisation/brand/product name is your STAR reference number.
5. Quick access to submit MI.
6. Quick access to this User Guide.
7. List of outstanding MI submissions for the year.
8. List of submitted MI submissions.
9. Organisation information. To make changes in the portal for a specific company/brand SLA, please ensure this is correctly selected and displayed as shown in point 3, 4 and 9.

Submitting MI





All Firms

Home

MI Submissions

MI Data Analysis

Contact Details

Private Documents

Shared Documents

User Registration

Your MI submission for November is due now

All currently-due submissions must be received by Monday 7 February, 2022

July 2021	August 2021	September 2021	October 2021	November 2021	1 December 2021	January 2022	February 2022
-----------	-------------	----------------	--------------	---------------	-----------------	--------------	---------------



Upload your submission...


 File can be either XSLX or CSV. See [here](#) for specification.

3

1. Outstanding MI submissions in red. Completed in green.
2. 4 step process for submitting MI. Upload, validate, review your entries and submit.
3. To submit MI, click 'SELECT A FILE' and browse to where your file is saved on the network and click on "ok".



STAR TEST 1

- Home
- MI Submissions
- MI Data Analysis
- Contact Details
- Private Documents
- Shared Documents
- User Registration

Your MI submission for November is due now

All currently-due submissions must be received by Monday 7 February, 2022



Validation Successful: Review your submission

Submit 3

File Name	Row #	Group Reference	Brand Reference	Month	Year	Product Type	Metric	Sub Metric	Value	Status	Info
1. test_isa.gia-10.xlsx	1	S9999	S9999z01	10	2021	ISA	EEJ	A	1000	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	2	S9999	S9999z01	10	2021	ISA	EEJ	B	20.5	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	3	S9999	S9999z01	10	2021	ISA	CPJ	A	800	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	4	S9999	S9999z01	10	2021	ISA	CPJ	B	18.5	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	5	S9999	S9999y01	10	2021	GIA	EEJ	A	500	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	6	S9999	S9999y01	10	2021	GIA	EEJ	B	23.4	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	7	S9999	S9999y01	10	2021	GIA	CPJ	A	500	Resubmitted	Entry already submitted previously
1. test_isa.gia-10.xlsx	8	S9999	S9999y01	10	2021	GIA	CPJ	B	22.4	Resubmitted	Entry already submitted previously

2

1. Once submitted, you will see an overview of where you are in the submission process.
2. Review table of MI submissions.
3. Once you are happy with your MI entries, select the submit button.

ST

STAR TEST 1

Home

MI Submissions

MI Data Analysis

Contact Details

Private Documents

Shared Documents

User Registration

1. test_isa.gia-10.xlsx	4	S9999	S9999z01	10	2021	ISA	CPJ	B	18.5	Resubmitted	Entry already submitted previously	1
1. test_isa.gia-10.xlsx	5	S9999	S9999y01	10	2021	GIA	EEJ	A	500	Resubmitted	Entry already submitted previously	
1. test_isa.gia-10.xlsx	6	S9999	S9999y01	10	2021	GIA	EEJ	B	23.4	Resubmitted	Entry already submitted previously	
1. test_isa.gia-10.xlsx	7	S9999	S9999y01	10	2021	GIA	CPJ	A	500	Resubmitted	Entry already submitted previously	
1. test_isa.gia-10.xlsx	8	S9999	S9999y01	10	2021	GIA	CPJ	B	23.4	Resubmitted	Entry already submitted previously	
1. test_isa.gia-11.xlsx	1	S9999	S9999z01	11	2021	ISA	EEJ	A	1000	Validated		
1. test_isa.gia-11.xlsx	2	S9999	S9999z01	11	2021	ISA	EEJ	B	20.5	Validated		
1. test_isa.gia-11.xlsx	3	S9999	S9999z01	11	2021	ISA	CPJ	A	800	Validated		
1. test_isa.gia-11.xlsx	4	S9999	S9999z01	11	2021	ISA	CPJ	B	18.5	Validated		
1. test_isa.gia-11.xlsx	5	S9999	S9999y01	11	2021	GIA	EEJ	A	500	Validated		2
1. test_isa.gia-11.xlsx	6	S9999	S9999y01	11	2021	GIA	EEJ	B	23.4	Validated		
1. test_isa.gia-11.xlsx	7	S9999	S9999y01	11	2021	GIA	CPJ	A	500	Validated		
1. test_isa.gia-11.xlsx	8	S9999	S9999y01	11	2021	GIA	CPJ	B	23.4	Validated		
1. test_isa.gia-NEW Rejected test.xlsx	1	S9999	S9999z01	10	2021	ISA	EEJ	A	1000	Resubmitted	Entry already submitted previously	
1. test_isa.gia-NEW Rejected test.xlsx	2	S9999	S9999z01	10	2021	ISA	EEJ	B	20.5	Resubmitted	Entry already submitted previously	
1. test_isa.gia-NEW Rejected test.xlsx	3	S9999		10	2021	ISA	CPJ	A	800	Rejected	Brand Reference missing	
1. test_isa.gia-NEW Rejected test.xlsx	4	S9999	S9999z01	10	2021	ISA	CPJ	B	18.5	Resubmitted	Entry already submitted previously	
1. test_isa.gia-NEW Rejected test.xlsx	5	S9999	S9999y01	10	2021	GIA	EEJ	A	500	Resubmitted	Entry already submitted previously	3
1. test_isa.gia-NEW Rejected test.xlsx	6	S9999	S9999y01	10	2021	GIA	EE	B	23.4	Rejected	The supplied metric 'EE' is not valid	
1. test_isa.gia-NEW Rejected test.xlsx	7	S9999	S9999y01	10	2021	GIA	CPJ	A	500	Resubmitted	Entry already submitted previously	
1. test_isa.gia-NEW Rejected test.xlsx	8	S9999	S9999y01	0	2021	GIA	CPJ	B	23.4	Rejected	No valid period (Month & Year) could be found. Make sure these are recorded as	

1. Easily navigate through the MI summary below and review your entries. The information column provides detail on the MI validation.
2. Blue fields indicate file has already been submitted, please note clicking submit will override all previous entries.
3. Green fields indicate file has passed MI validation.
4. Red fields indicate issues with the MI submission and reason for rejection.
5. Once reviewed, click the “submit” button (see previous slide).



STAR TEST 1

- Home
- MI Submissions
- MI Data Analysis
- Contact Details
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- Shared Documents
- User Registration

Your MI submission for November is due now

All currently-due submissions must be received by Monday 7 February, 2022

July 2021	August 2021	September 2021	October 2021	November 2021	December 2021	January 2022	February 2022
-----------	-------------	----------------	--------------	---------------	---------------	--------------	---------------



Submission Successful. You can now close the browser or make another submission.

3

File Name	Row #	Group Reference	Brand Reference	Month	Year	Product Type	Metric	Sub Metric	Value	Status	Info
	0	STAR TEST 1	STAR test 2	0	0	ISA	Ceding Party Journey	Days to Complete	18.50	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	ISA	Ceding Party Journey	Transfers Completed	800.00	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	ISA	End to End Transfer Time	Days to Complete	20.50	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	GIA	End to End Transfer Time	Transfers Completed	500.00	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	ISA	End to End Transfer Time	Transfers Completed	1000.00	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	GIA	End to End Transfer Time	Days to Complete	23.40	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	GIA	Ceding Party Journey	Transfers Completed	500.00	Submitted	
	0	STAR TEST 1	STAR test 2	0	0	GIA	Ceding Party Journey	Days to Complete	23.40	Submitted	

1. The overview MI submission process is updated to show MI has been submitted.
2. Confirmation message that MI submission has been successful. Please note that if you wish to make another submission, you just need to click back on step 1 'Upload MI File'.

The page features a dark purple background. On the left side, there are several overlapping, angular, light purple shapes that resemble stylized arrows or abstract geometric forms. On the right side, there is a large, multi-pointed star-like shape composed of overlapping light purple and dark purple segments. The text 'Supplementary MI' is centered in the middle of the page in a white, bold, sans-serif font.

Supplementary MI



All Firms

[Home](#)[MI Submissions](#)[MI Data Analysis](#)[+ Supplementary MI](#)[Contact Details](#)[Private Documents](#)[Shared Documents](#)[User Registration](#)

January 2024

February 2024

March 2024

April 2024

May 2024

June 2024

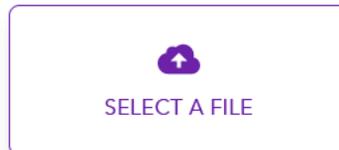
1 Upload MI Data

2 Automatic Validation

3 Review Your Entries

4 Submit

Upload your submission...



 File can be either XSLX or CSV.

Click below to submit Supplementary MI for Accreditation

[+ Add Supplementary MI...](#)

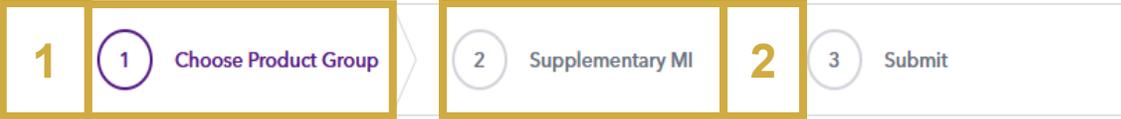
1

1. To submit Supplementary MI, click '+Add Supplementary MI'

- Supplementary MI is only required **at the point of accreditation**
- The data you provide must cover the time period you are being accredited on
- Please consult the Supplementary Information Guidelines document <https://www.joinstar.co.uk/about-star/star-mi/>

Supplementary MI for Period January 2023 – December 2023

📅 Must be submitted by



Select an SLA product group that you are submitting MI for:

<input type="radio"/>	OCP	S0001w01	STAR B Company 3
<input type="radio"/>	PSS	S0001x01	STAR B Company 2
<input type="radio"/>	PSS	S0001x02	STAR B company 4
<input type="radio"/>	GIA	S0001y01	STAR B company 1
<input type="radio"/>	ISA	S0001z01	STAR B company 1

Supplementary MI for Accreditation Period January 2023 – December 2023

📅 Must be submitted by Thursday 08 Feb



Supplementary MI for STAR B Company 3 (OCP S0001w01)

Please review your responses and submit if OK

Start date of the period you are submitting MI for:	1 Jan 2023
End date of the period you are submitting MI for:	31 December 2023
What percentage of all transfers completed for this period have been reported?	100%
What percentage of your electronic cases have been reported?	100%
Are the STAR customer communication principles being followed?	Yes
Please provide details of any outliers and mitigating circumstances to be submitted to STAR?	(none)

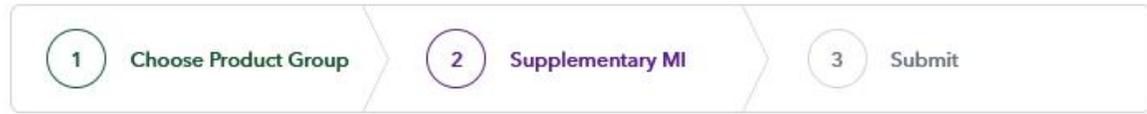


3 step process for supplementary MI.

1. Choose Product group you need to supply Supplementary MI for.
2. Answer the Supplementary questions (see next page).
3. Review and submit.
4. Submit & Close if you have provided Supplementary MI for all your products
5. Submit & Continue if you need to provide Supplementary MI for another product.

Supplementary MI for Accreditation Period January 2023 – December 2023

Must be submitted by Thursday 08 Feb



Supplementary MI for STAR B Company 3 (OCP S0001w01) 1

Please answer the following (hover over the ? below for more information):

? Please select the period you are submitting for: 2 Accreditation Period January 2023 – December 2023

Start date of the period you are submitting MI for: 1 Jan 2023

End date of the period you are submitting MI for: 31 Dec 2023

? What percentage of all transfers completed for this period have been reported 95%

? What percentage of your electronic cases have been reported?

? Are the STAR customer communication principles being followed?
 Yes
 No
 Some

? Please provide details of any outliers and mitigating circumstances to be submitted to STAR? 3

4 Continue >>

Supplementary MI is only required at the point of accreditation

1. Different questions appear depending on the product.
2. The data you provide must cover the whole period you are being accredited on, choose from the drop-down list, either 12 months or 9 months.
3. As the information provided will be shared with the ASG, please do not identify your member organisation or share volumes other than as a percentage.
4. You can Continue once you have answered all mandatory questions.
5. Supplementary MI to be provided separately for the ISA & GIA product groups.

MI Data Analysis



STAR TEST 1

STAR TEST 1 1

[Products](#)
[Contacts](#)

S

STAR TEST 1 S9999 2

ISA/GIA S9999z01,S9999y01

PSS s9999x01

MI Submissions

Firm	3	↑ Product	Metric	Sub Metric	Period	Value
	4					
STAR TEST 1		Personal Pension	End to End Transfer Time	Transfers Completed	October 2021	200.00
STAR TEST 1		ISA	End to End Transfer Time	Transfers Completed	October 2021	1000.00
STAR TEST 1		GIA	End to End Transfer Time	Days to Complete	October 2021	23.40
STAR TEST 1		Personal Pension	Acquiring Party Journey	Transfers Completed	October 2021	200.00
STAR TEST 1		ISA	End to End Transfer Time	Days to Complete	October 2021	20.50
STAR TEST 1		ISA	Ceding Party Journey	Days to Complete	October 2021	18.50
STAR TEST 1		Personal Pension	End to End Transfer Time	Days to Complete	October 2021	10.50
STAR TEST 1		ISA	Ceding Party Journey	Transfers Completed	October 2021	800.00
STAR TEST 1		GIA	End to End Transfer Time	Transfers Completed	October 2021	500.00
STAR TEST 1		GIA	Ceding Party Journey	Transfers Completed	October 2021	500.00
STAR TEST 1		GIA	Ceding Party Journey	Days to Complete	October 2021	23.40
STAR TEST 1		Personal Pension	Ceding Party Journey	Transfers Completed	October 2021	150.00
STAR TEST 1		Personal Pension	Ceding Party Journey	Days to Complete	October 2021	8.50
STAR TEST 1		Personal Pension	Ceding Party Journey	Transfers Completed	October 2021	15.00
STAR TEST 1		Personal Pension	Ceding Party Journey	Days to Complete	October 2021	10.20

1. View all MI submissions for your organisation/brand or product level.
2. Quick access to Group and brand/product SLA level.
3. Sort by selecting any column heading and then by using ascending/descending arrow.
4. Search for MI under any header using the free text field.

The background is a solid dark purple color. On the left side, there are several overlapping, angular, light purple shapes that resemble stylized arrows or abstract geometric patterns. On the right side, there is a large, multi-pointed star-like shape composed of overlapping light purple and dark purple segments, also with a stylized, geometric appearance.

Viewing contact details



STAR TEST 1

STAR TEST 1
1
<

Products Contacts

S

STAR TEST 1
2

☆ ISA/GIA
 S9999z01,S9999y01

☆ PSS
 s9999x01

- Contact Details
- Private Documents
- Shared Documents
- User Registration

Contact Details

User	3	↑	Email	Job Title	Phone	Permission	Last Login
	4						
Alex Wilber TEST			AlexW@contengodev.onmicrosoft.com			Star Member	
Alex Wilber TEST			AlexW@contengodev.onmicrosoft.com			Star Member	
Alistair Johnston			alistair.johnston@criterion.org.uk	Business Analyst	0131 357 0100	Star Member	Tuesday 16 Nov 2...
Danielle Barrass	5		danielle.barrass@tisa.uk.com	Operations Manager	07549614880	Star Admin	Monday 16:11
Lisa Lamont			Lisa.Lamont@criterion.org.uk	Marketing Manager		Star Admin	26 minutes ago
Lisa Lamont			Lisa.Lamont@criterion.org.uk	Marketing Manager		Star Relationship Manager	26 minutes ago
Lisa Test Shared			enquiries@criterion.org.uk	Marketing	07552207968	Star Relationship Manager	

1. View all contacts for your organisation.
2. Quick access to Group and brand/product SLA level.
3. Sort by selecting any column heading and then by using ascending/descending arrow.
4. Search for MI under any header using the free text field.
5. High level contact details can be viewed by selecting name. To manage contacts, please go to "User Registration" tab.



Your private documents

ST**STAR TEST 1**

STAR TEST 1

Products

Contacts

S

STAR TEST 1
S9999★ ISA/GIA
S9999z01,S9999y01★ PSS
s9999x01

Private Documents

Private Documents

	Name	↑ Added	
	permission workflow	30 Nov 2021	
	STAR Test Joining Form	28 Nov 2021	
	Test Subfolder	28 Nov 2021	



This area is secure and can be used by your organisation to store sensitive information relating to your involvement with STAR. It is private to your organisational group and is not user specific, all registrations under the group can see all documents added if they have the relevant permissions.

1. You can use create a new folder and easily upload any files to this private documents area.
2. Documentation stored in this folder can be exported to excel or PDF. Please note, only those contacts with the correct permissions can access, view, upload and extract documents saved in this area.
3. Documentation can be deleted if needed.

STAR shared documents

ST**STAR TEST 1**

STAR TEST 1

Products

Contacts

S

 **STAR TEST 1**
S9999 ISA/GIA
S9999z01,S9999y01 PSS
s9999x01**General Documents****General Documents**

	Name	↑ Added
	MI Requirements	3 Oct 2021
	Sample Files	3 Oct 2021
	User Guides	9 Nov 2021

1



- Home
- MI Submissions
- MI Data Analysis
- Contact Details
- Private Documents
- Shared Documents**
- User Registration

This area is used by STAR to store important information, which cannot be stored on the website.

1. You cannot upload any documentation to this area, however, you can access, view and extract in excel or PDF.

Managing your users





STAR test 2 < 10

STAR test 2

- Home
- MI Submissions
- MI Data Analysis
- Contact Details
- Private Documents
- Shared Documents
- User Registration**

Products Contacts

S

STAR TEST 1
S9999

ISA/GIA
S9999z01,S9999y01 1

PSS
s9999x01

User Registration

STAR test 2 Users 2

Not Registered 3

+ Add Update × Cancel 4

Name	Email	Access Level	
▼ STAR TEST 1			
Alex Wilber TEST	AlexW@contengodev.onmicros...	star member	5

Registered 6

+ Add Update × Cancel Search 7

Name	Email	Access Level	
▼ STAR TEST 1			
Danielle Barrass	danielle.barrass@tisa.uk.com	star admin	8
Lisa Lamont	Lisa.Lamont@critterion.org.uk	star admin	

<< < 1 > >> 9

1 of 1 pages (2 items)

<< < 1 > >> 1 of 1 pages (3 items)

1. Organisation/brand/product level.
2. Brand/product name.
3. List of unregistered users.
4. You can add/update a user (see next slide).
5. Once the user has been added and email verified, you can drag them to the registered list.
6. Registered user list.
7. You can view user details and permission levels.
8. Users can be edited and deleted as needed. Please note, this is your responsibility to keep up-to-date.
9. Page navigation.
10. Collapse chevron if you are unable to see the edit user button.

ST

STAR test 2

STAR test 2

Products

Contacts

S

STAR TEST 1
S9999ISA/GIA
S9999z01,S9999y01PSS
s9999x01

Search



Access Level

arrass@tisa.uk.com

star admin



nt@criterion.org.uk

star admin

**New user for STAR test 2** 1

First Name

Lisa

Surname

Lamont Test

Email

lisa.lamont@criterion.org.uk

Work Phone

07552 207968

Mobile Phone

07552 207968

Job Title

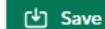
Marketing

Access Level

star relationship manager

2

2



Save



Cancel

1. To add a new user, select add (as per previous slide). Please note you need to click onto the product level (star icon) for the add users option to be clickable.
2. Complete all fields of the online user form, permission level and select save. An email verification will be sent to the users email.

Once the email has been verified, the user will appear in the "Not registered" user list. To activate, drag the user details to the "Registered User" list on the right hand side.

- ★ If a user has multiple relationship types for different product registrations then the menu items are available to the permission of a combined set that is available for either access level.
- ★ There is only one RM per company registration which has full admin access, but we allow you the ability to add additional admin users to support your role if required.
- ★ If the RM does not assign a specific MI contact it will be assumed the RM or admin will submit MI

Role	Admin	Relationship Manager	Member	MI	Supplier
Home	Y	Y	Y	Y	Y
MI Submissions	Y	Y	N	Y	Y
MI Data Analysis	Y	Y	N	Y	Y
Contacts Details	Y- edit all	Y- edit all	Y- edit own	Y- edit own	N
Private Documents	Y- edit	Y- edit	Y - view	Y - view	N
Shared Documents	Y - view	Y - view	Y - view	Y - view	N
User Registration	Y	Y	N	N	N

Overview of how the permissions are assigned to each user role

Y – Give the user access to that section

N – User will not be able to see the section

If you have any questions regarding how to use The Members Portal or about the STAR initiative, please do not hesitate to contact us.

★ enquiries@joinstar.co.uk

★ www.joinstar.co.uk