**Wealth Management | Employee Benefits | Investing & Insurance | Software & Technology**
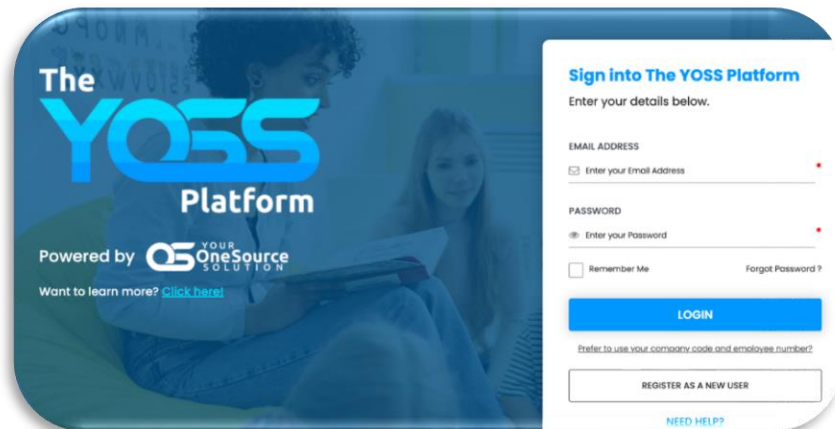
# The YOSS Platform – End User Guide

Your employer utilizes The YOSS Platform for many of your Finance and HR Topics. The YOSS Platform is a simple to use web-based HR & Finance Software which allows you 24/7 access to important documents such as your pay stubs. Our team has compiled this guide as a useful resource to assist you in accessing the platform.
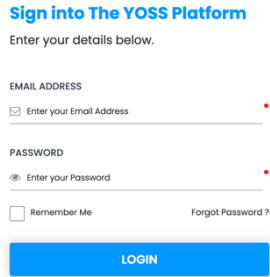
**How do I register?**

1. Visit https://yossplatform.com/login.aspx
2. Click on "Register as a New User"
   a. Users have two choices when completing the New User process
      i. Email and Date of Birth
      ii. Company Code (as provided by your HR Department), Employee ID, and Date of Birth
   b. **When implementing The YOSS Platform, emails are not always available. As such, it is possible your email is not pre-loaded in the system so you may be required to register using option two. Once registered, you can update your profile with your email for use when logging in moving forward should you wish to.**
   c. Your Employer's HR/Finance/Payroll Department can provide you with your **Company Code** if you do not know it
   d. Once you enter your details and are verified, you will create a password
      i. Passwords must include at least 8 characters with at least 1 upper case, 1 lower case, 1 number, and 1 special character.

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**How do I login?**

1. Visit https://yossplatform.com/login.aspx
2. Two Login Methods
   a. Using your email and password
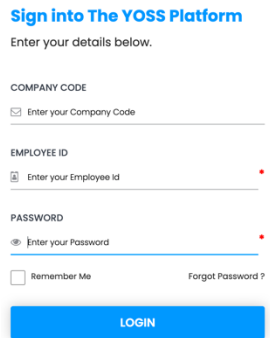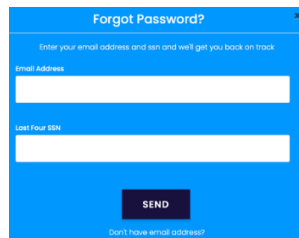
   

   i.
   b. Using your Company Code, Employee ID, and password

   

   i.

**How do I reset my password if I have forgotten it?**

1. Click on Forgot Password on the main login screen
2. Two Reset Methods
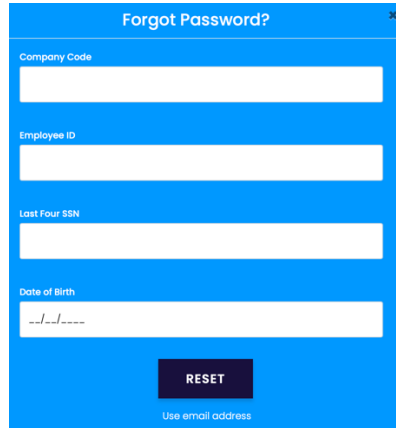   a. Using your email address and the last four of your Social Security Number

   

   i.
   ii. Once you enter your email address and the last four of your Social Security Number and the data has been matched to your profile, you will receive a reset password link via email.

Password reset continued on next page.

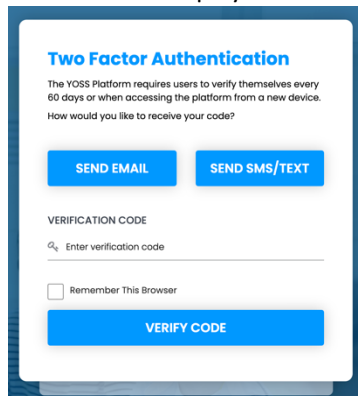**How do I reset my password if I have forgotten it? (Continued)**

    b.    Using your Company Code and Employee ID



        i.

        ii.    Enter your Company Code, Employee ID, the last four digits of your Social Security Number and your Date of Birth

        iii.    Once the information is confirmed as matching your profile, you will be provided with a Change Password option within your browser
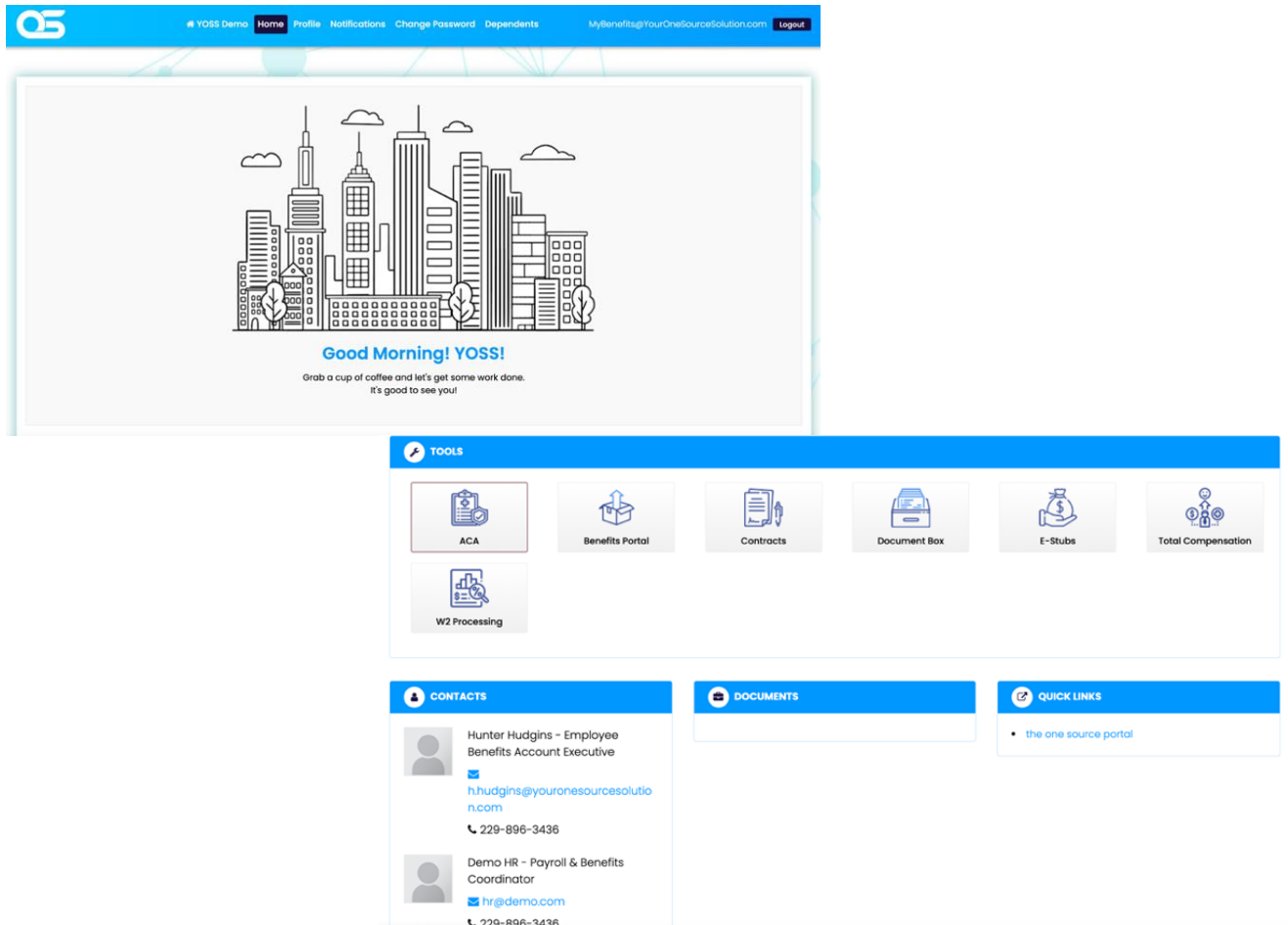
**How do I set-up and use the Two-Factor Security?**

1. Anytime you login from a new device you will be prompted to complete a Two-Factor Security Check. The below screen will display



    a.

    b.    You can verify using your email on file or your verified mobile SMS number if also verified.

    c.    Once you click "Send" **do not refresh your page** or you will be required to re-start.

    d.    Upon typing in the verification code, you can click "Remember This Browser" and you will not be prompted for a code for 60 days.

2. If your profile does not have an email or verified mobile number, you will be prompted to enter and verify those details before proceeding.

**Exploring the Employee Dashboard**



- Under Tools, you will be able to view the tools your employer is currently utilizing.
- Towards the bottom of your dashboard, you will find useful contacts, documents, and quick links.

- From the dashboard, you can view your Profile, update your Notifications preferences, and Change your password
- Profile change requests are set as pending until approved by your HR Department