J.P.Morgan
WORKPLACE SOLUTIONS

L3 Public

Workplace Solutions

Mobile App

User Guide 2025

Powered by Global Shares

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Overview of the Mobile App

The **J.P.Morgan Workplace Solutions app** (Mobile App) is a fully native App for Plan participants, available to be downloaded from iOS and Android stores.

In using the Mobile App, participants can:

- View their portfolio value
- View and download tax documents
- Drill into a detailed view of their plan, awards, and shares
- Sell shares
- Exercise options
- Review transaction history
- Track future, upcoming, and past events
- Accept Consent and Notifications on the Mobile App.

With a secure sign-on process, Participants must input a valid Username and Password and complete two-factor authentication before gaining access to their portfolio.

You can enable biometric login once you have successfully signed in.

The Purpose of the Mobile App

The iOS and Android App gives you access to the following functionality:

- **Dashboard**: view your **portfolio** and the total potential value
- **Portfolio**: get a **breakdown** of your portfolio by plan, awards, and shares
- **Transactions**: **exercise** your options, **sell** your shares, and **view** your contract notes and transaction history
- **Events**: review **transaction history** and **track** future, upcoming, and past events
- **Account**: here, you can view; **Bank Account Information, Account Preferences, Participant Labels, Identifiers, Contact Details,** and **Address Details,** if this information is available to view on your **desktop** account. You can also; **update your preferred language and currency,** manage your **password**, and **multi-factor authentication**, and can **view** and **download MifID, FINRA,** and **1099** statements. There is also a **Contact Us** option.

Read on for further information, including information on options that you can view if your company has them enabled!

How to access the Mobile App

Prerequisites for **Mobile App** access include:

- Your **employer**, or the **company** with whom you have your equity compensation plan, must have **authorized** the use of the Mobile App as part of their agreement with the firm
- You must have logged in to your **desktop portal** and have a valid **user ID** and **password**

  Important: If your company has given you **SSO** (Single Sign-On) access, you can log in with your **verified** work email address.

  This involves the following steps:
  1. Tap **Login with SSO** on the Login screen
  2. Enter your **work email address**
  3. Once your details are **verified**, you will be logged in.
- Please refer to the **FAQ** '**How do I login with SSO'** section of this user guide for further details including helpful images for this process.
- You must have **signed off all required tasks** on the **desktop portal** before you can enter the Mobile App dashboard.

How to use the Mobile App

The **Dashboard Chart** shows your **Portfolio** in terms of **units** and the **total potential value**. It also gives you a breakdown of your **Portfolio**, i.e., what is available, what is available with restrictions, what transactions are in progress, and what is unavailable.

The value of your **Portfolio** is based on the **most recent share price**. This is to give you an indication of the **potential value** of **your Portfolio.**

What do the dashboard values on the Portfolio Chart mean?

- **Available potential value**: the total of your vested and transactable equity by the latest share price
- **Available potential value with restrictions**: the total of your vested and transactable equity that has restrictions (i.e., tax implications) by the latest share price of the award's share class
- **Total potential portfolio value**: the sum of the available and unavailable value of your equity and shareholdings by the latest share price
- **Transactions in progress**: the total value of your vested and transactable equity, which is currently being processed but has not been finalized by the price achieved or the latest share price
- **Unavailable potential value:** the total of your unvested and non-transactable equity by the latest share price of the award's security class.

If you have more than one Share class, the drill-down option will appear at the bottom of the dashboard. You may select a different currency on the top right corner of the dashboard if you have more than 1 set up.

How to access Outstanding tasks on the dashboard

The **Outstanding task** banner on the dashboard provides a convenient overview of pending tasks. If task functionality is enabled, the banner will display the number of outstanding tasks related to grant and tax payment elections.

When this banner is visible, you can tap on the link to be redirected to the **Events** section of the app. Here, you can review your task history, accept outstanding grant tasks, and complete tax payment elections tasks (if applicable).

Mobile Grant Acceptance Tasks eligibility

- Mobile Grant Acceptance is available only for specific grant types: NQO, RSU, RSA, PSU, and PSA
- The **grant task** functionality is aligned with the new Workplace Solutions Participant portal, ensuring consistency across platforms. Mobile task content is currently not customizable
- The **mobile task** functionality must be enabled by a client before it will be visible on the mobile app. For more information on who this functionality is enabled for, please reach out to your Client contact.

Mobile Tax Payment Acceptance Election eligibility

- Available for the following awards types: RSU, RSA, PSU, PSA, and CRSU
- Awards with deferrals and multi-tranche elections are not currently available as part of the mobile task offering
- Caters to the following tax election types: sell all, monetary payment, sell to cover, and withhold to cover
- Must be enabled for a company as part of a mobile app release. To enable this functionality, please reach out to your Client contact
- The task functionality is at parity with the new Workplace Solutions participant portal. Mobile task content is currently not customizable.

How to access your Portfolio from the Dashboard Chart

1. Tap on the **total** in the center of the chart or on the following options, which include; **available**, **available with restrictions, transactions in progress, and unavailable**
2. You will be redirected to your **Portfolio**, where you will have a detailed view of your plans, awards, and shares.

> You can update your Portfolio currency on the Dashboard screen if you have more than one currency available.

How to use your Portfolio

The **Portfolio** area gives you a breakdown of your Portfolio by **Plans**, **Awards**, and/or **Shares**. To get further details on what is available under a plan, you can do the following:

1. Tap on the **plan** and use the arrows to drill down to a detailed view of your awards, where you can view **award balances, details, and transaction history**
2. To view all your awards, tap **Awards**
3. To view all your shares, tap **Shares**
4. You can also filter your **Portfolio** using the filters: **available with restrictions, transactions in progress, and unavailable.** These options are located above the total potential portfolio value.

> If you have more than one Share class, the drilldown option will appear at the top right corner of the Portfolio section so you can view your equity per share class.

How to use the Transactions area

If the **Transactions** option is available on your App, you will have access to one or more of the following areas:

1. Exercise options
2. Sell shares
3. Transaction history
4. Contract notes.

How to sell shares

When you tap the **Sell Shares** button, the App will validate if:

1. The transaction window is open
2. If you have a bank account set up
3. If you have shares available to sell.

If any of the above is invalid, you will not be able to sell your shares. If you do not have a bank account saved, you will need to update your bank details on your desktop portal.

How to agree to Sale Terms and Conditions

1. If your company requires you to sign off on **Sale Terms and Conditions, a Terms and Conditions** page will be displayed
2. You will need to **review** these terms before selling your shares
3. Tap on the checkboxes and select **Next** to continue.

If you have shares listed on more than one stock exchange, you will be required to select your security (share class).

If you have shares in different share groups, you will be required to select the share group before selecting the number of shares to sell.

How to select the shares that you want to sell

1. On the **Share Selection** screen, you can select the number of shares to sell by tapping on the **Total Units**
2. If you want to select a specific certificate to sell, press **Manually select** (if the option is available to you)
3. Select the **certificates** under the **Certificates** header by tapping the chevron
4. Once you have added the number of shares to sell, the **Estimated Proceeds Value** will update to indicate what you could expect to receive.

How to select the Order Type

If your company has more than one **Order Type** enabled, you can select one of the following order types:

1. Market order
2. Day limit order
3. Limit order.

How to select a Delivery Method

1. You can select the **currency** in which you wish to receive your proceeds if there is more than one currency available
2. If you select an **alternative currency**, the App will provide you with an estimated exchange rate
3. If there is **more than one** distribution method available, you can specify how your net proceeds should be delivered to you, i.e., whether it should be sent to your nominated bank account, via payroll, or sent to your address. The options available to you will depend on the currency and distribution methods that your company has adopted.

How to submit a Sale Request

1. In the last step, you can **review** your order, tap the checkbox to sign off on the declaration and submit the sale request
2. Once the **Sale Request** is sent for processing, you will receive an email confirmation when the sale is finalized.

How to view Contract Notes

1. Tap on the **Contract Notes** button on the **Transactions** screen
2. The **Contract Notes Overview** page gives you a complete history of your **Contract Notes** and the **status of each transaction**
3. You can **filter** your **Contract Notes** by **Year, Type or Status**
4. If a **Cancel Order** link displays, there is the option to cancel the order
5. Tap on the relevant **Contract Note**, to view the **full sale order details, associated fees and commissions, and distribution details.**

How to Exercise Options and View Exercise History

Exercise Options: Exercise and Withhold Shares to Cover

You can convert your options into shares by **exercising your options** and **withholding** them. Your company will **keep enough shares** to cover the exercise cost, taxes, and other charges (if applicable), while the **remaining shares** will be held in your account.To access these options, please follow the below instructions:

1. Tap **Exercise options** to start exercising your grant
2. Agree to the **Terms and Conditions** (if your company requires you to sign off on **Terms and Conditions**, please read the documentation and tap **Next**)
3. Select a **Security** option**.** If you have **more than one security** with available grants, you will need to select the one with which you will proceed
4. Next, select a **Grant group.** If you have **more than one** type of grant group, you will be able to select between a number of options, e.g., stock appreciation rights and savings options
5. From here, select an **Exercise method.** If you have **more than one** exercise method, you will be able to select between the following options:

    a) **Withhold shares to cover** (the description below represents this exercise method)
    b) **Sell enough shares to cover payment**
    c) **Retain all shares**
    d) **Sell all**

6. Choose from the **number** of options to exercise
7. You can input the number of options in the **Total Units** field on the **Select Options** screen
8. If you would like a **specific grant**, **tap** the **grant title,** and open a **new screen** dedicated to that grant. This will have an impact on the overall values
9. After selecting the **number of options** to exercise, you may see an extra step, called **Select share distribution** from which you can choose from the following options:

    a) **Employee share account**
    b) **Transfer to alternate account**
    c) **Issued share certificate**

10. Review the **values** and **quantities** presented on the **Submit Exercise Request** screen
11. Read the **confirmation** text and tap the **checkbox** to agree
12. To conclude the process, tap **Exercise.**

Exercise and Sell enough shares to cover payment

With this method, you can **convert your options into shares**. Then, you can **sell some of those shares** to cover the cost of exercising, taxes, fees, and any other charges that may apply. Finally, you can **keep the remaining shares** in your account to sell them later.

To access these options, please follow the below instructions:

1. Tap **Exercise options** to get started on exercising your grants
2. Agree to the **Terms and Conditions** (if your company requires you to sign off on **Terms and Conditions**, please read the documentation and tap **Next**)
3. Select a **Security** option**.** If you have more than one security with available grants, you will need to select one with which you wish to proceed
4. Next, select a **Grant group.** If you have **more than one** type of grant group, you will be able to select between a number of options, e.g., stock appreciation rights and savings options
5. From here, select an **Exercise method.** If you have **more than one** exercise method, you will be able to select between the following:

    a) **Withhold shares to cover**
    b) **Sell enough shares to cover payment** (the below description represents this exercise method)
    c) **Retain all shares**
    d) **Sell all**

6. Choose from the **number** of options to exercise
7. On the **Select Options** screen, you can input the number of options in the **Total Units** field
8. If you would like a **specific grant**, **tap** the **grant title,** and open a **new screen** dedicated to that grant. This will have an impact on the overall values
9. After selecting the amount of options to exercise, you can see an extra step, called **Select share distribution** from which you may choose from the following:

    a) **Employee share account**
    b) **Transfer to alternate account**
    c) **Issued share certificate**

10. Review the **values** and **quantities** presented on the **Submit Exercise Request** screen
11. Read the **confirmation** text and tap the **checkbox** to agree
12. To conclude the process, tap **Exercise.**

Exercise and Retain all Shares

With this method, you can **convert** your options into shares and keep them in your account. To cover the exercise cost (if applicable), you need to make a payment to us. This can also be made to your company. Once the payment is received, we will process the exercise and transfer the shares to your account. Alternatively, your company can do this.

1. Tap **Exercise options** to get started on exercising your grants
2. Agree to the **Terms and Conditions** (if your company requires you to sign off on **Terms and Conditions**, please read the documentation and tap **Next**)
3. Select a **Security** option**.** If you have more than one security with available grants, you will need to select one with which you wish to proceed
4. Next, select a **Grant group.** If you have **more than one** type of grant group, you will be able to select between a number of options, e.g., stock appreciation rights and savings options
5. From here, select an **Exercise method.** If you have **more than one** exercise method, you will be able to select between the following:

    a) Withhold shares to cover
    b) Sell enough shares to cover payment
    c) Retain all shares (the description below represents this exercise method)
    d) Sell all

6. Choose from the **number** of options to exercise. On the **Select Options** screen, you can input the number of options in the **Total Units** field
7. If you would like a **specific grant**, **tap** the **grant title,** and open a **new screen** dedicated to that grant. This will have an impact on the overall values
8. After selecting the amount of options to exercise, you can witness an extra step, called **Select share distribution** from where you may choose from the following:

    a) **Employee share account**
    b) **Transfer to alternate account**
    c) **Issued share certificate**

9. Review the **values** and **quantities** presented on the **Submit Exercise Request** screen
10. Read the **confirmation** text and tap the **checkbox** to agree
11. To conclude the process, tap **Exercise.**

Exercise and Sell All

Using this method, you have the option to **convert your options into shares** and then **sell all** of those shares right away. Once the sale is complete, the proceeds will be deposited into your **nominated bank account** or provided through **payroll** (based on your plan rules), after deducting the exercise cost, taxes, fees, and any other charges that may apply.

1. Tap **Exercise options** to get started on exercising your grants
2. Agree to the **Terms and Conditions** (if your company requires you to sign off on **Terms and Conditions**, please read the documentation and tap **Next**)
3. Select a **Security** option**.** If you have more than one security with available grants, you will need to select one with which you wish to proceed
4. Next, select a **Grant group.** If you have **more than one** type of grant group, you will be able to select between a number of options, e.g., stock appreciation rights and savings options
5. From here, select an **Exercise method.** If you have **more than one** exercise method, you will be able to select between the following:

    a) Withhold shares to cover
    b) Sell enough shares to cover payment
    c) Retain all shares
    d) Sell all (the description below represents this exercise method)

6. Choose from the **number** of options to exercise
7. On the **Select Options** screen, you can input the number of options in the **Total Units** field
8. If you would like a **specific grant**, **tap** the **grant title,** and open a **new screen** dedicated to that grant. This will have an impact on the overall values
9. Select the **Order type.** If your company has **more than one** order type available, you can select **Market Order** or **Limit Order**
10. Select **Delivery Method.** You can select the **currency** in which you would like to receive your proceeds. If you select an **alternative currency**, the App will provide you with an **estimated exchange rate**
11. You can specify how your **net proceeds** should be **delivered** to you. Select if proceeds should be sent to your **nominated bank account** via **payroll** or sent to your **address**. The options available to you will depend on the **currency** and **distribution methods** your company has enabled
12. Review the **values** and **quantities** presented on the **Submit Exercise Request** screen
13. Read the **confirmation** text and tap the **checkbox to agree**
14. To conclude the process, tap **Exercise.**

Exercise Contract Notes and Transaction History

1. If you submitted a **Sell All** or **Sell to Cover** exercise, you can review their status in the **Review** section of the **Transactions** area
2. If you submitted a **Retain All** or **Withhold to cover exercise,** you can view their status in the **Transaction History** section.

To comply with Rule 603 of Regulation NMS (Vendor Display Rule) participants who hold shares or options listed on the U.S. Stock Exchange will have real-time share price information displayed prominently at the top of the final confirmation/review step of the Exercise, or Sales Wizard.

How to view Transaction windows

The transaction windows show current and upcoming sale and exercise windows directly within the Mobile app.

1. Navigate to the **Transactions** tab
2. Tap on the **Transaction Windows** button. It will appear below the existing **Sell shares** and **Exercise options** navigation buttons.

How to track Events

You can keep track of **notable events** in the **Events** area:

1. The **To Do** area lists **outstanding tasks** that must be completed on the participant's **desktop portal**
2. The **Future Events** area displays **upcoming events** so that you can plan for the future
3. The **In Progress** area displays **transactions** that are currently in progress, for example, a transaction request submitted outside of market hours
4. The **Past event** area displays **historical events and transactions**.

How to accept a Grant Task on the App

1. Upon logging into the app, you will be redirected to the dashboard view
2. **Outstanding Task Banner:**
    - The **Outstanding Task** banner on the dashboard provides a convenient overview of pending tasks. It displays the number of outstanding tasks related to grant and tax payment elections, applicable only for specific grant types
    - When this banner is visible, you can **tap** on the link to be redirected to the **Events** section of the app. Here, you can review your **task history** and **accept** grant tasks, streamlining the task management process
    - The number of outstanding tasks is also visible on the **Events** icon on the Navigation panel. Outstanding tasks over 90 days will not be counted.
3. **How to Accept a Grant Task:**
    - Tap on the **Events** tab to review tasks and navigate to the **Tasks** section
    - Scroll across to view all **outstanding** tasks. Tax payment elections cannot be completed on the app and must still be accepted on the portal
    - Tap on the **task** card to review an outstanding task
    - Scroll down to review the **grant information**, download, and accept task documentation if applicable
    - Tap on the **Accept** button to complete the task
    - Tap on the **Decline** button to decline the grant task
    - Once completed, you will be **redirected** to a screen confirming the grant has been accepted or declined
    - To **review** your task history or complete the task again, select the task in the History section of the task screen.

How to submit a Tax Payment Election task on the App

1. Tap on the **Events** tab to review tasks and navigate to the Tasks section
2. Scroll across to view **all** outstanding tasks
3. Tap on the **task card** to review an outstanding task
4. Review the **grant and vesting details** information, then tap Next
5. Select your **preferred** tax payment method. Depending on your plan rules, one or more of the following options will be available: sell all, monetary payment, sell to cover, or withhold to cover. Then tap **Next**
6. Review and **accept** the relevant task documentation (if applicable)
7. Tap on the **Select** button to complete the task
8. Once completed, you will be redirected to a screen **confirming** the tax election has been processed
9. To review your task history or update the task, select the task in the **History** section of the task screen.

How to use the Account area

The **Account** area is divided into the following sections, **Profile, Preferences, Documents,** and **About Us**.

You can do the following in this area:

1. You can find your **Personal information** under **Profile.** This includes; **Address details, Contact details, Identifiers and Labels.** Tap on this section to review your **Profile details.** One or more of the menu options may **not** be visible on the App. If the option is visible on your desktop portal, it will display on the App
2. In **Payment Preferences**, you can see your **bank accounts**, **dividend** and **sale payment** preferences
    - **Bank Account Information:** Tap on this option to view your **bank account** details
    - **Dividend Payment Preferences:** Tap on this option to view **dividend payment preferences** for your Shares (if applicable), SIP Shares (if applicable) and Dividend Equivalents (if applicable)
    - **Sale Payments:** Tap on this option to view your **default payment preference** for the **Sales** and the **Exercise transaction wizards**
    - **Participant Labels:** Tap on this option to view **participant labels**. **Participant labels** are **custom** fields that are company specific
    - **Identifiers:** Tap on this option to view your account-related **Identifiers**, which may include one or more of the following. If these options are visible on your desktop portal, they will be available on the App:
        1. Social security number
        2. Employee ID
        3. Stockholder ID
        4. Tax ID
3. **Contact details:** View your **contact details**, which may include one or more of the following. One or more of the below menu options may not be visible on the App. If the option is visible on your desktop portal, it will display on the App:
    - Email(s)
    - Preferred email
    - Work email
    - Personal email
    - Phone numbers
    - Mobile number
    - Office Number
    - Fax number
4. **Address Details:** View your **address details**, which may include one or more of the following. If these options are visible on your desktop portal, they will be available on the App.
    - Work Address
    - Residential Address
    - Alternative Payment Address
    - Beneficiary Address

  - Stockholder Address
5. Under **Account preferences**, are **Currency preferences**, **Biometrics, Language, Appearance, and Security options**
    - **Currency preference:** To view your **portfolio** (assets) in an **alternative currency**, select an alternative currency from the **currency** list provided. The currency options available will be the same as your desktop application
    - **Biometrics:** The **Biometric** option presented to you, will vary depending on your device (e.g., iOS=Face ID, Touch ID, Android = Fingerprint/Face.) Tap on this option to turn biometric authentication **on/off**
    - **Language:** The localization settings on your device will determine the language displayed on the Workplace Solutions Mobile App. For example, the App will display **Greek** if you have **Greek localization** set on your mobile device. If the App does not cater to the language on your device, it will display in English. You can change the default language in your device settings by tapping on the language option, where you will be redirected to the localization setting for your device
    - **Appearance:** The **appearance** of the App will automatically adjust to your device preference. You can also adjust the appearance of the App, by selecting **Appearance** and then selecting either Light (light mode), Dark (dark mode), or System (which is the default and picks up your device preferences)
    - **Security:** To manage your password, protect your account, and view additional security resources, tap on the **Security** option. You will be required to input your login credentials. Once logged in, there is the ability to, **Change your password**, **Manage MFA methods**, and **Manage Admin SSO**
6. Under the **Documents** area, you can access your **1099, FINRA** and **MiFID** reports
7. In the **About us** section, you will find the **Contact us** area, **Privacy Policy**, **Terms and Conditions,** and the **Sign out** button
    - **Contact us:** Tap to contact our Helpdesk team via email
    - **Privacy policy:** Tap to review our privacy policy
    - **Terms and Conditions:** Tap to review our Terms and Conditions.

Document Library has been renamed to Tax Documents to align with the desktop version.

How to accept Consent and Notifications on the J.P.Morgan Workplace Solutions' Mobile App

1. Log in to the **Mobile app** using credentials or **SSO**
2. Authenticate using **MFA**. Mobile Terms and Conditions must be accepted if it is your first time entering the app.The Account Opening task must also be completed on the Participant portal before accessing the Mobile app.
3. If new **Terms and Conditions** are required to be reviewed and accepted, the **Terms, documents and disclosures** page will display immediately upon logging in to the app
4. One or more documents are presented in the **Reference Documents** section
    a. Reviewing these documents is not a mandatory action
    b. Selecting the **document** will download the document and open in a new window
    c. The **Done** option can be used to return to the **Terms, documents and disclosures** page
5. The relevant **Terms and Conditions** document can be seen in the **Terms and Conditions** section
6. Select the **Terms and Conditions** document
7. The document will open in a new window
    a. It is **mandatory** to review the full document
    b. **Share and Search** options are also available
8. Once reviewed, select **Done** to return to the **Terms, documents and disclosures** page
9. The status on the **Terms and Conditions** document will update to **Read**
10. The status of the document will remain **Unread** if the document is not reviewed to the very last page i.e., it is mandatory to scroll to the end of the document.
11. Repeat steps **4-9** on all presented documentation
12. Select **Agree** to accept and proceed
    a. The **Agree** button will not be available until all presented **Terms and Conditions** documents have a status of **Read**
13. The **Consent for data sharing** page is shown based on your demographic information
14. Click on **I do not consent** or **I consent** to go to the main dashboard. This registers as **I do not consent** (i.e., you do not consent to share your data with the wider firm and it means that you do not want to avail of any additional J.P. Morgan Executive Services)
15. On each step, is it possible to contact the **Helpdesk** by selecting the **Contact Us** link
16. The **Privacy Notice** is also available at each step of the process by selecting the **Privacy Notice** link. This will redirect you to the relevant **Privacy Notice** on the our website.

Please note there is **no** decline option. To decline, you must log out of the app. When you next log in, the Terms and Conditions will be presented again. You must accept Terms and Conditions to access the rest of the app.

Terms and Conditions **only** display when the client is enabled on the Consent and Notifications framework.

FAQ

What are the prerequisites for Mobile App access?

- Your **employer**, or the company with which you have your equity compensation plan, must have **authorized** use of the Mobile App as part of their agreement with us
- You have logged in to your desktop portal, and you have a **valid User ID** and **password**
- If you have been given **SSO** (Single Sign-On) access, please refer to the FAQ section '**How do I login with SSO'**
- You must have **signed off** all required tasks on the **desktop portal** before you can enter the **Mobile App** dashboard.

What languages are supported on the Mobile App?

The **localization settings** on your device will determine the language displayed on the Workplace Solutions Mobile App.

For instance, the App will display in Greek, if you have Greek localization set on your mobile device. If the App does not cater to the language on your device, it will display in English.

The Mobile App supports the following languages:

1. Arabic
2. Canadian French
3. Chinese (Simplified)
4. English
5. French
6. German
7. Greek
8. Italian
9. Korean
10. Spanish
11. Turkish.

Can I switch to Dark mode when using the Mobile App?

Yes. The Mobile App now includes a **new dark mode**, which offers the following benefits:

1. **Saves battery life:** Dark mode helps your phone's battery last longer
2. **Enhances visibility:** Improves visibility for people with low vision and those who are sensitive to bright light

3. **Reduces eye strain:** Using dark mode can decrease eye strain and dryness for individuals who spend extended periods looking at screens.

The Mobile App provides a setting called '**follow system setting**' mode. When enabled, the App will automatically adopt the default display theme of the operating system. If the system is set to **dark mode**, the App will **switch** to dark mode as well. Conversely, if the system setting is not set to dark mode, the App will be in **light mode.**

How do I sign into the Mobile App if Multi-Factor Authentication (MFA) is enabled?

Please refer to the New Authentication User Guide for information on MFA.

What is SSO?

Single sign-on (SSO) allows you to access multiple related software systems with just **one login**.

We use the SSO initiated by the **Service Provider** (SP). This means that you don't need to keep logging in every time you want to access a different system.

Using **SSO**, you can **save time** and **avoid remembering** multiple logins for different systems, as you will use your employer, or the company, with which you have your equity compensation plan, login credentials.

How do I log in with SSO?

1. Tap **Login with SSO** on the Login screen
2. Enter your **work email address**. Your **work email address** is the source of information used to evaluate the **associated domain** and find the correct **Identity Provider** for your company SSO credentials
3. If the email address provided is **incorrect** or is **not associated** with any **Identity Provider**, you will receive an **Error message**
4. If the email address is **correct** and the correct **Identity Provider** is located, the App will redirect you to your employer SSO system. This will **verify** that you have **logged in**. In this case, further information is not needed.
5. If you are not logged in, you will be requested to log in via the employer SSO system. Here, you will need to provide your **company login credentials**.

Is the Mobile App available on iOS and Android?

The **Mobile App** is a fully native app for Plan Participants, available to be downloaded from iOS and Android stores. To provide iOS users with an excellent experience, we have discontinued support for the App on iOS devices running **iOS 13** and **14.**

The minimum requirement for iOS devices supported by the Workplace Solutions Mobile App is the **iOS 15** version or later. The App will also only be available for **Android Version 8** and above. You will be notified of this when signing into the App.

How do I enable Touch ID/Fingerprint ID?

To enable **Touch ID**, first, ensure that you have a **fingerprint** active and enabled in your phone's settings. Follow the instructions below:

iOS – Touch ID/FaceID

If this is your first time entering the App:

1. Open the **App**
2. Accept the **Terms and Conditions**
3. Tap **Sign in.** Enter your **Username** and **Password**
4. Tap **Enable Touch ID/FaceID**
5. Enter your **fingerprint/position your face** in front of your device. If successful, you will be logged in to the App. The next time you enter the App, you will be able to use your **Touch ID**
6. If you skipped the step on your initial log in, and want to enable **Touch ID/FaceID** from within the App, navigate to the **My Account** screen
7. Tap the **slider** next to **Touch ID enabled**
8. Enter your **fingerprint/position your face** in front of your device. If successful, the next time you enter the App, you will be able to use your **Touch ID.**

Android - Fingerprint ID

If you want to enable **Fingerprint ID**, ensure that you have a **fingerprint active** and **enabled** in your phone's settings. If this is your first time entering the App, follow the instructions below:

1. Open the **App**
2. Accept the **Terms and Conditions**
3. Tap **Sign in**
4. Enter your **Username** and **Password**
5. Tap **Enable Fingerprint ID**
6. Enter your **fingerprint**. If successful, you will be logged in to the App and the next time you enter the App, you will be able to use your **Fingerprint ID**
7. If you skipped the step on your initial login and want to enable **Fingerprint ID** from within the App, navigate to the **My Account** screen
8. Tap the **slider** next to **Fingerprint ID enabled**
9. Enter your **fingerprint**. If successful, the next time you enter the App, you will be able to use your **Fingerprint ID.**

Can the App be installed on a rooted device?

- For security reasons, the App **cannot** be installed on rooted Android and iOS devices. If you attempt to **download** and log in to the App on a rooted device, a **pop-up** message will appear
- If you select **OK** on the pop-up message, you will **not** have access to the **sign-in** functionality, preventing you from accessing the App.

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