

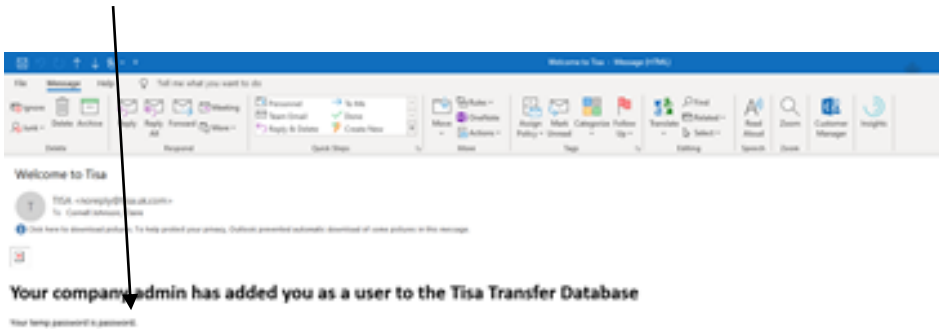
## Transfers Database First Time Logon User Guide

### Existing users

In July 2019 the transfers database was changed. Access for users who previously received logon details was copied across based on the email address held by TISA with standard initial password **1503D1**.

### New users

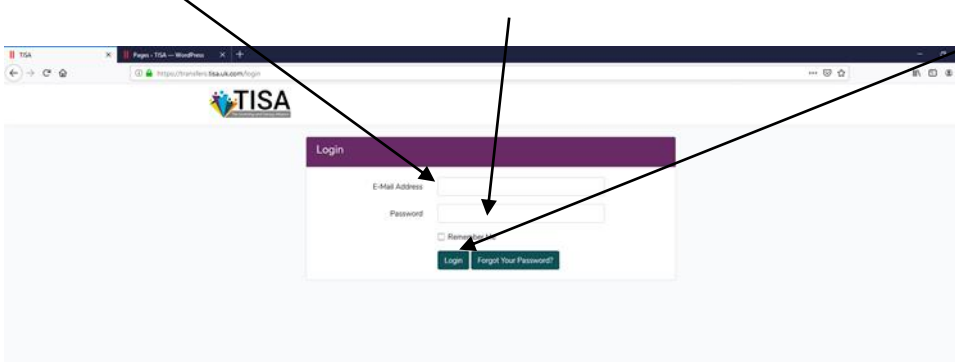
New users added to the transfers database will receive an email to confirm their access and to provide an initial password (note this may go into spam or junk)



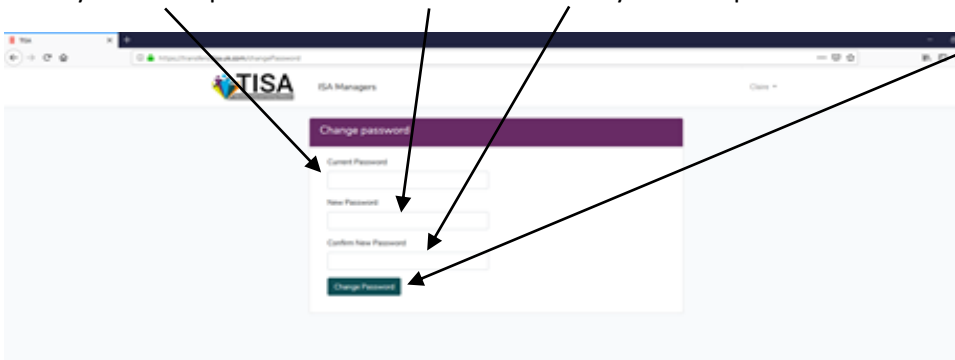
### All users

When logging on for the first time you will be prompted to reset your password,

Enter your email address and initial password (note both are case sensitive) and select **LOGIN**



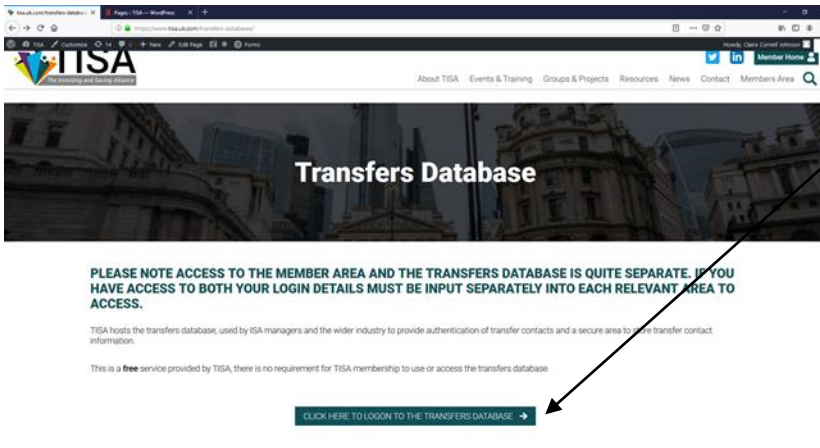
Enter your initial password then enter and confirm your new password and select **CHANGE PASSWORD**.



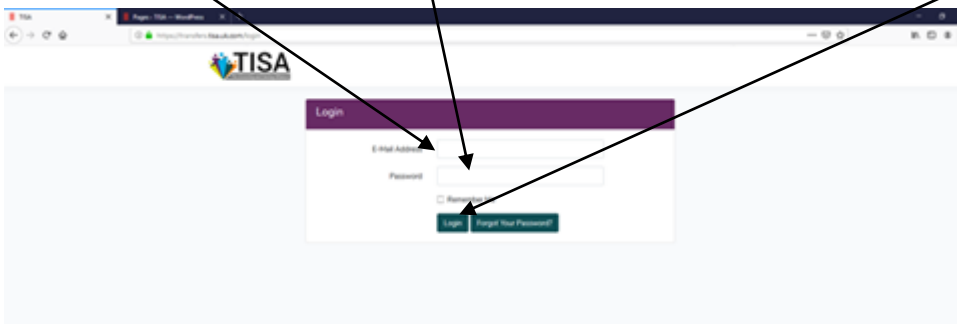
## Transfers Database User Guide

### Accessing the transfers database

The transfers database can be accessed from various areas of the TISA website or directly using the following link: <https://www.tisa.uk.com/transfers-databases/> and following the **CLICK HERE** link



Enter your email address and password (note both are case sensitive) and select **LOGIN**

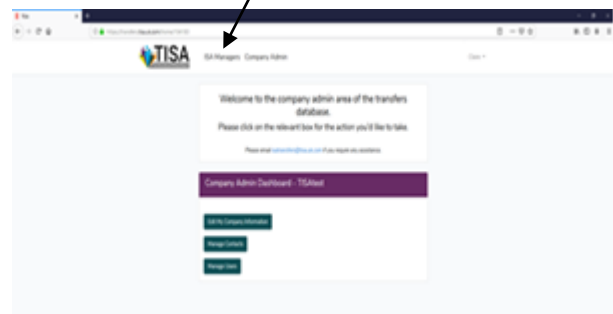


The screen displayed next will depend on your individual access level. Database users will be presented with the transfers database information (1). Database managers will be presented with a choice of ISA managers or Company Admin (2), to access the transfers database select **ISA MANAGERS**

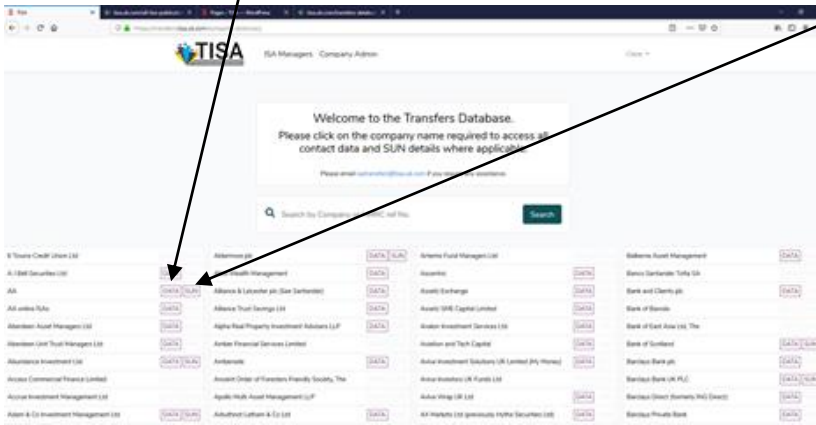
1



2

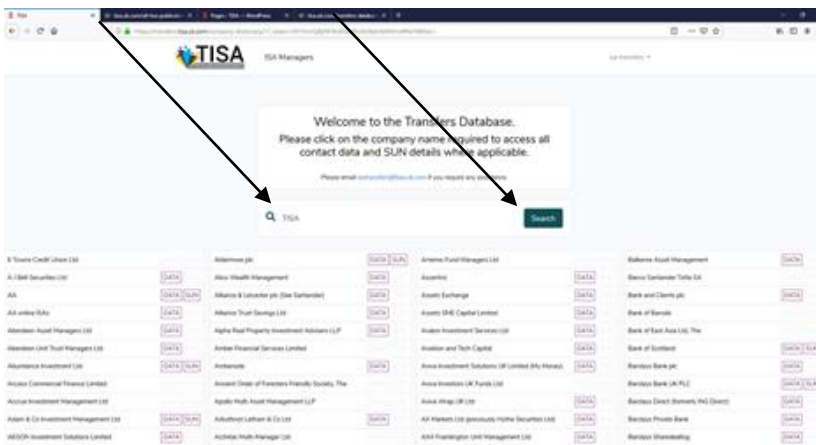


All ISA managers listed on the transfers database are displayed alphabetically, those with data present are indicated by the **DATA** flag and those with SUN details are indicated by the **SUN** flag.

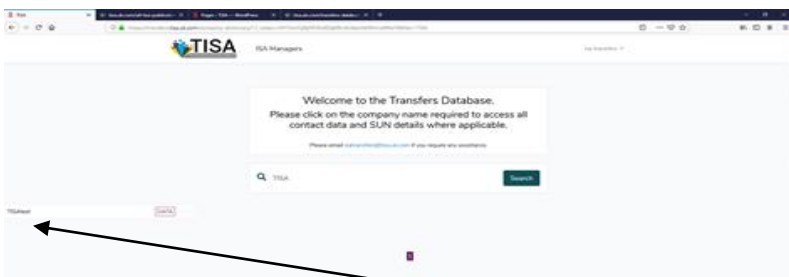


To view data (where data is present) select the relevant company name.

To search for an ISA manager by name or HMRC ISA manager reference, enter the relevant details in the search box and select **SEARCH**.



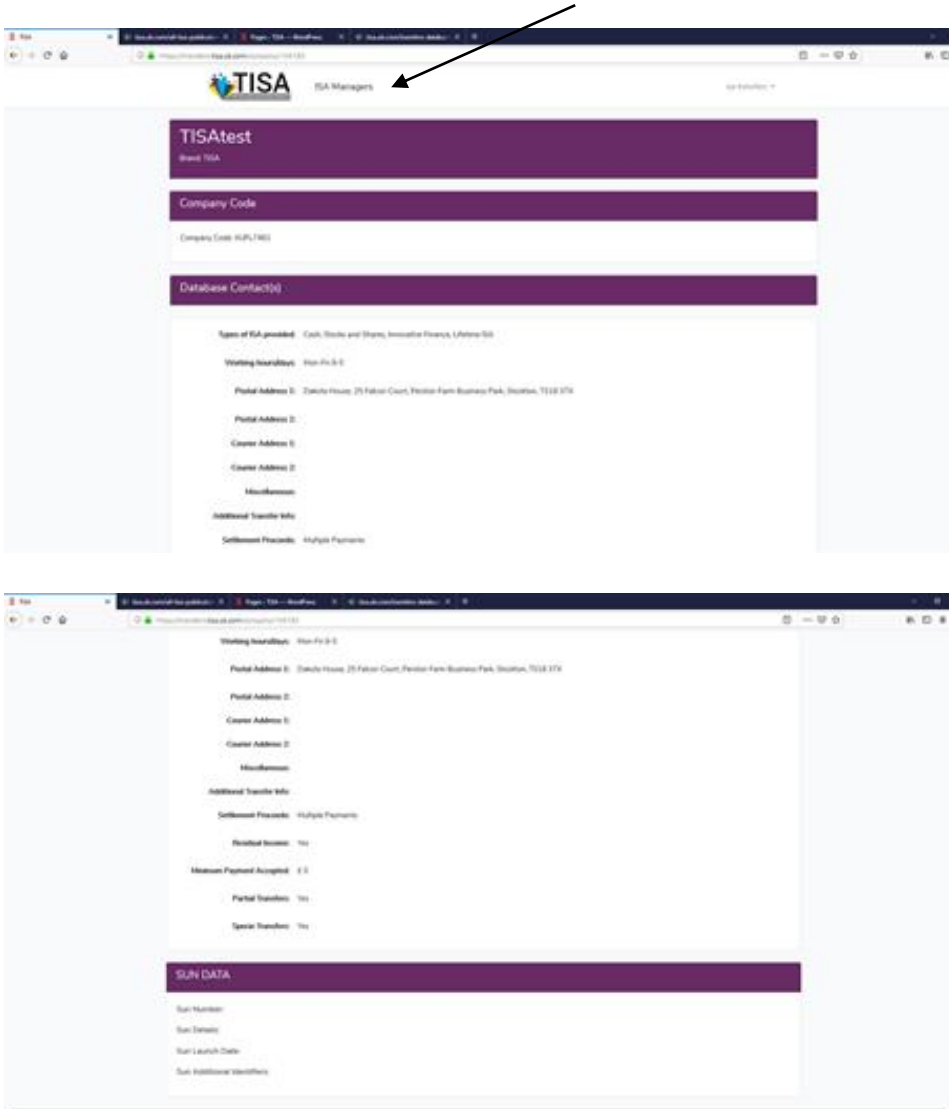
Any companies matching your search results will be displayed with the DATA and SUN flags per the main display page.



To view data (where data is present) select the relevant company name.

All data and contact details provided for the company will be displayed along with the transfers database company code and any SUN details. Scroll down the page to view all information.

To return to the transfers database select **ISA MANAGERS** (note there is no back button)



Please note the presence, accuracy and validity of data shown on the database is the responsibility of each participating company.

If you experience any errors or issues in performance or functionality of the transfers database please contact [isatransfers@tisa.uk.com](mailto:isatransfers@tisa.uk.com).