Frequently Asked Questions

The Adviser Portal

1. How do I access the Adviser Portal?

The Adviser portal can be accessed via www.cirencester-friendly.com

To access the portal for the first time, look out for an email from us with your secure login instructions.

If you have not received a registration email from us, please contact our Agency Team on **0800 587 5098** or **agency.services@cirencester-friendly.co.uk**

2. What is the Adviser portal? What does it do?

The Adviser portal is a self-serve tool that enables you to quote, apply and purchase our Income Protection products online on behalf of your clients. The portal is supported by our new automated Underwriting tool, which we will continually configure to ensure we provide you with an immediate decision wherever possible.

We are part way through our digital transformation journey, therefore it is not yet possible to service existing contracts via the portal.

3. I've forgotten my password to the portal, how can I reset it?

Reset your own password by selecting the 'I forgot my password' section on the portal log in screen. Please click here for our user guide on how to do this.

4. How can I amend my notification preferences in the Adviser portal?

The portal will notify you when certain key events take place during the application journey. You can configure the notification settings in the portal to your liking. Click here for our guide showing you how to do this.

5. Are Paraplanners/Sales Support able to access my applications on the Adviser portal?

Yes. We have a dedicated paraplanner permission available to anybody in paraplanner/sales support roles. I you would like to talk to us about setting up paraplanner permissions for your team please contact our Agency Team on **0800 587 5098** or **agency.services@cirencester-friendly.co.uk**

6. How can I update you with changes about me?

As an Adviser, you can amend personal details such as; address, telephone number and email address in the 'My Account' section of the Adviser portal. Any other changes will need to be notified to our Agency Team, who can be contacted on **0800 587 5098** or **agency.services@cirencester-friendly.co.uk**

7. Can I view earned commission on the Adviser portal?

Yes, you can view details of earned commission in the 'My Commission' section of the portal. This will only display details of commission earned on contracts sold via the new Adviser portal. If you have other contracts with us that have been sold prior to you using our new portal, commission details for these contracts will not be shown here.

Quote & Apply

1. Can I quote and apply with you using the adviser portal?

Yes. Our Adviser portal enables you to quote and apply with us directly. You can find more detailed instructions on how to do this here.

2. Can I view previously created quotes and applications in the portal?

Yes. You can use the 'My Quotes' and 'My Applications' section of the Adviser portal to do this. Please click here for further information set out in our guide.

3. How do I track progress on an application that I've submitted?

You can use the 'My Applications' section of the adviser portal to view the current status of your application. In many cases, you will also be able to see details of any outstanding information for each application.

4. Can I amend an application after I have submitted it?

No. It is not currently possible to amend an application once you have submitted it. Please ensure you complete all information accurately as a new application may need to be submitted if changes are required.

5. Can I download a copy of a submitted application?

Yes, this is available in the 'My Applications' section of the Adviser portal. If you open the application, on the right-hand side of the screen is a section entitled 'Documents', click on the drop-down menu 'Application documents' and open the Application Summary. This will open the document. You can download the document by selecting the arrow icon in the top right-hand section of the screen.

6. Do I need to provide my client's email address?

Yes. The client's email address is important as it is used as their logon for the Member portal, where they will be able to view their contract documents. If you are applying for multiple contracts for a number of people within a household, please ensure you provide a separate email address for each applicant, as they will each be provided with their own portal account.

7. A third party will be paying my client's premiums from their bank account, do I need to do anything different when submitting the application?

Yes. You will still be able to enter the 3rd party's payment details into the portal however we will be unable to start premium collections until we have received a paper copy of the Direct Debit instruction that has been signed by the payer. In the event that your applicant wishes to pay from a third-party bank account, please give our Underwriting Admin Team a call on **0800 587 5098**, who can talk you through the next steps.

8. When do quotes automatically expire?

Quotations are valid for 30 days.

9. When do applications automatically expire?

Applications expire 90 days after an Underwriting decision has been made.

10. Am I able to put a contract on risk myself?

Yes. The Adviser portal enables you to accept underwriting terms and put a contract on risk. Please click here for our user guide on how to do this.

Contract Servicing

1. What is the Member portal? How does my client access it?

The Member portal enables your client to access their contact documentation online. We will send your client an email with instructions on how to log in to the portal once their contract is issued.

2. Can my client's contract be amended via the Adviser portal or Member Portal?

It is not possible to amend existing contracts on our portals at this time. If your client wishes to make an amendment to a contract, please contact our Member Services Team on **0800 587 5098** (ext 7201), who will be happy to help.

3. How can my client make a claim?

In the event that your client needs to claim, they can follow the steps below to begin the claims process:

- Contact us to request a Claim Form on **0800 587 5098**
- Complete and return the form
- Ensure to include original medical documentation
- Ensure to include original financial documentation showing your earnings in the last 12 months.
- Your claim will then be given to a dedicated handler who will help you with any queries you may have.