

Your guide to the Customer Portal

Helping you make the most of your policy



The Customer Portal

The Customer Portal is there when you need it, helping you make the most of your policy.



Benefits of registering

The Customer Portal gives you secure 24/7 access to all of your policies so you can easily manage your cover.



View all your documents online



Find information about your policy

- Type of cover
- Who's covered
- Cover amount
- Your current premium
- How long you're covered for.



Update your personal details

- Change your contact details
- Change your address
- Change your bank details.



Update your preferences

- Change your premium payment date
- Change your communication preference, including the option to go paperless.

And, if you bought your policy from us directly:

- Increase or reduce your cover
- Add selected benefits
- Change how long your policy runs for.

Getting started

Before you can do anything, you'll need to activate your portal account using a unique link.

- If you've already received an invitation, use the link provided – it's valid for up to 60 days from the date of issue.
- If you haven't got one, or if the link has expired, you can ask us to send you one. Call us on **0370 850 4419** (Monday to Friday 8.30am to 5.30pm, except bank holidays) or email us at zigesupport@uk.zurich.com – we'll just need your email address and policy number.
- Alternatively, go to the portal and click on the 'Not currently registered?' link – either scan the QR code or click on the blue button below to go to the login page.



[Go to Customer Portal](#)

Using your online account



Your Dashboard



Viewing your documents



Updating your contact details and preferences



Updating your bank details



Changing your cover



Changing your password



Making a claim





Your Dashboard

You'll find yourself here when you log in. It has key information about your policy, and you can easily navigate to find the information you're looking for or make changes.

The screenshot shows the Zurich Life Protection dashboard. At the top left is the Zurich logo, and at the top right is a 'Sign out' button. On the left is a navigation menu with links: 'Dashboard', 'Contact details', 'Change password', 'Bank details', 'Documents', and 'Make a claim'. Callouts point from these links to specific areas: 'View and update your details' points to 'Contact details', 'Bank details', and 'Documents'; 'To make a claim or for helpful claims information' points to 'Make a claim'; and 'Links to your document library' points to 'Documents'. The main content area is titled 'Life Protection' and displays 'Policy number : PRXXXXXXXXXX'. A large blue box shows the premium of '£25.77 a month' with a '✓ 10 year term'. Below this, the 'Sum assured' is '£50,000'. A callout states 'This section shows key information about your policy or policies'. Under 'Policy Active', details include 'Single life', 'Life and critical illness cover', 'Level cover', 'Start date 01/05/2019', and 'End date 30/04/2029'. At the bottom are three links: 'View policy documents', 'Change payment details', and 'Amend policy'. Callouts also point to these links: 'Change the bank account your premiums are taken from' points to 'Change payment details', and 'If you're a direct customer and want to change your policy' points to 'Amend policy'.

ZURICH Sign out

Dashboard

- Contact details
- Change password
- Bank details
- Documents
- Make a claim

Life Protection

Policy number : PRXXXXXXXXXX

£25.77 a month
✓ 10 year term

Sum assured
£50,000

Policy Active
Single life
Life and critical illness cover
Level cover
Start date 01/05/2019
End date 30/04/2029

[View policy documents](#)

[Change payment details](#)

[Amend policy](#)

Callouts:

- View and update your details
- To make a claim or for helpful claims information
- Links to your document library
- This section shows key information about your policy or policies
- Change the bank account your premiums are taken from
- If you're a direct customer and want to change your policy






Viewing your documents

There's no need to hang onto mountains of paperwork if you prefer not to. Simply click the link to find all your policy documents in one place.

You'll find your policy schedule, terms and conditions, as well as other useful documents and of course the letters we send to you, like your yearly statements.

Sign out

Dashboard

Contact details

Change password

Bank details

Documents

Make a claim

View your documents

Documents

Document name	Reference	Date	
Direct Debit Confirmation Notice	PRXXXXXXXXXX	25/04/2019	
Policy Schedule	PRXXXXXXXXXX	25/04/2019	
Policy Cover Letter	PRXXXXXXXXXX	25/04/2019	
Key Features	PRXXXXXXXXXX	25/04/2019	
Terms and Conditions	PRXXXXXXXXXX	25/04/2019	
Personal Details Confirmation	PRXXXXXXXXXX	25/04/2019	







Updating your contact details and preferences

If you're moving house or you've recently changed your telephone number, you can update your information by following the 'Contact details' link on your Dashboard.

You can also update your contact preferences, including the option to choose paper or digital communications.

The following steps show how to change your details. Once you've made the changes, remember to click the 'Update details' button to make sure they're saved.



 Sign out

Dashboard

Contact details

Change password

Bank details

Documents

Make a claim

Contact details

Postcode

Reset

Address line 1

Address line 2


Address line 3

Town

Your phone number

How would you prefer to be contacted about your policy?

☒ Online through the Zurich portal ☐ Post



At Zurich, we're always working to reduce our carbon footprint. Help us save the environment by going paperless

Cancel

Update details

We're passionate about trees and customer choice. If you share our passion for trees and prefer to receive digital communications, please select 'Online'. When we send you something, we'll put it in your document library and send an email to let you know it's there.

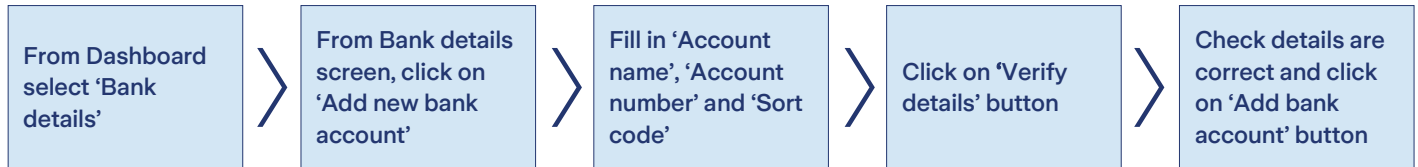
Click on 'Update details' once you've finished



Updating your bank details

In just a few clicks, you can add new bank accounts and change premium collection dates.

To add a new bank account



The screenshot shows the Zurich user interface. On the left is a sidebar menu with options: Dashboard, Contact details, Change password, **Bank details** (highlighted), Documents, and Make a claim. The main content area is titled 'Bank details' and displays the user's name 'John Smith', 'Account number: 000000000', and 'Sort code: 00-00-00'. A blue callout box points to the 'Bank details' menu item and the 'Add new bank account' button. The button is a dark blue rectangle with white text.

This screenshot shows the same 'Bank details' page but with the form fields for adding a new account. The fields are: 'Account holder's name' (containing 'John Smith'), 'Account number' (containing '000000000'), and 'Sort code' (three boxes, each containing '00'). A blue callout box points to these three fields. At the bottom, another blue callout box points to the 'Verify details' button, which is a dark blue rectangle with white text.

- Dashboard
- Contact details
- Change password
- Bank details**
- Documents
- Make a claim

Bank details

Account holder's name

John Smith

Account number

000000000

Sort code

00 00 00

BANK NAME

Bank House
Bank Street
Bankstown
BK00 0XX

Check details are correct and click on 'Add bank account' button

Cancel

Add bank account

Changing the account we take premiums from

Once you've set up new bank account details, you'll need to set it up so we take future premiums from it.

If you've got more than one policy, you can choose for the premiums for each policy to be taken from the same or different accounts. You'll need to set up each separately.



It's important to complete this last step to apply your new account details to each of your respective policies. If you don't, your premiums will continue to be debited from the original account.

From Dashboard, select the policy you want to change



Then select 'Change payment details'



Select the account from the dropdown menu and your preferred payment date



Finally, click on 'Update details' button to save your changes

Dashboard

Contact details
Change password
Bank details
Documents
Make a claim

Life Protection

Policy number : PRXXXXXXXXXX

Sum assured
£50,000

Policy Active

Single life
Life and critical illness cover
Level cover
Start date 01/05/2019
End date 30/04/2029

£25.77 a month
✓ 10 year term

Select 'Change
payment details'

[View policy documents](#)[Change payment details](#)[Amend policy](#)**Change payment details**

Bank account

John Smith (****00000) 

Preferred premium collection date

1 

Select the account from
the dropdown menu and
your preferred payment
date

Are you the holder of this account?

☐ Yes ☐ No

Are you authorised to set up direct debits from this account?

☐ Yes ☐ No**Cancel****Update details**

Click on 'Update details'
button to save your
changes

Dashboard

Contact details
Change password
Bank details
Documents
Make a claim

Changing your cover*

If you purchased your policy through our website or through a third party provider, such as MoneySuperMarket for example, you may be able to make changes to your policy online.

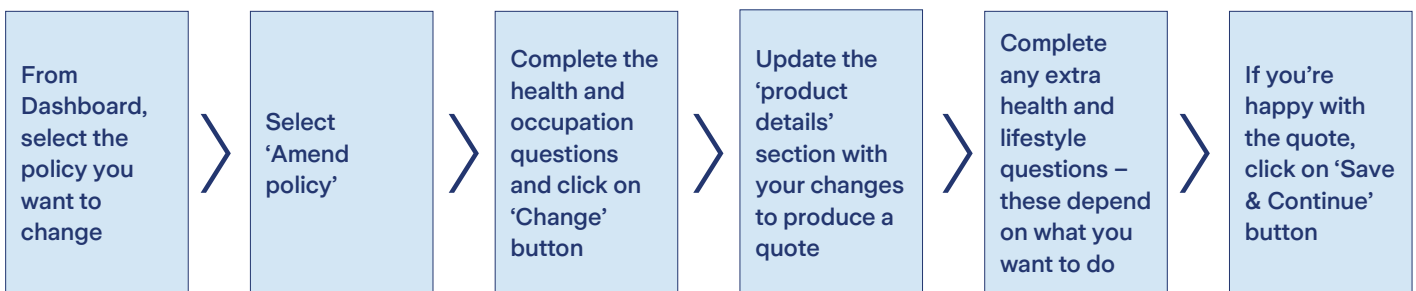
You can get a quote to:

- increase or reduce your level of cover
- amend how long your policy runs for
- add Children's Critical Illness cover
- add Multi-Fracture cover.

Once you've got a quote you can choose to go ahead with the changes or stick with the cover you already have, it's completely up to you.

***If you bought your policy from an adviser, you won't see this option in your portal. If you want to change your policy, please speak to your adviser. They're best placed to support you if your needs or circumstances have changed.**

Work through the screens answering the questions on each screen as you go. This will be different depending on the options you choose.



ZURICH Sign out

Dashboard

- Contact details
- Change password
- Bank details
- Documents
- Make a claim

Life Protection

Policy number : PRXXXXXXXXXX

Sum assured
£50,000

£25.77 a month
✓ 10 year term

Policy Active
Single life
Life and critical illness cover
Level cover
Start date 01/05/2019
End date 30/04/2029

[View policy documents](#) [Change payment details](#) [Amend policy](#)

Select 'Amend policy'

Personal details

Tobacco or nicotine usage

Never used



Please provide accurate information about your client's use of cigarettes including roll ups, vapes and e-cigarettes containing nicotine, cigars, pipes or any other tobacco or nicotine products including patches and gum.

This is an important factor in our assessment and payment of claims. We carry out tests to confirm use.

If the life assured is a previous smoker, the final premium could be higher than any initial quote previously provided through a comparison website.

Occupation

Customer Services Manager

Complete the health and occupation questions and click on either 'Change' or 'Continue' (which button you'll see will depend on whether you're amending your occupation or if it's staying the same)

Change



Save and exit

Product details

Change my cover amount

£

50000

I want my cover to last for a different amount of time (years)

10

Add Critical illness for my children



I also want to protect my children with cover that provides a lump sum should they suffer a critical illness

Add multi-fracture cover



I also want to protect myself with cover that provides a lump sum should I suffer a fracture.

Complete the Product details screen based on the changes to your cover and then click on 'Continue'

Continue

Your quote

Existing cover

John Smith

- ✓ £50,000 Life cover
- ✓ £50,000 Critical illness cover
- ✓ 10 years Policy term

£25.77 a month

Updated cover

John Smith

- ✓ £50,000 Life cover
- ✓ £50,000 Critical illness cover
- ✓ 10 years Policy term

 [Quote illustration](#)

£25.77 a month

Back

Save & Continue

If you're happy with the quote, click on 'Save & Continue' button

If you're happy to proceed based on the updated cover option shown, simply select the 'Save & Continue' button. From here you'll be taken to a declaration page where you'll need to 'Accept terms' to make the changes required, following the steps on screen.

There might be some scenarios in which the process of generating a quote might take a little longer, or where we need to revisit some of the health and lifestyle questions you answered as part of your original application. This may happen if you're increasing cover. In these instances, any additional questions will be displayed on screen to make the process as smooth and seamless as possible.

Once you've accepted the new terms, you'll receive a confirmation to let you know your policy has been updated. A copy of your new documents will also be stored ready for you to view automatically in your 'Documents' section of the portal.

If your policy is held in joint names, you'll both need to complete this process and then call us to confirm your consent over the phone. This is an additional security measure to make sure both parties are happy with the changes requested.

If you've indicated you'd like to receive communications by post, you'll receive them via this method too, usually within the next 5-7 working days. Don't forget, if you'd prefer to receive them electronically, you can amend your preferences in the [Contact details](#) section by following the steps shown on page 6.



You've been accepted. Here's a summary of your cover

- ✓ £50,000 level life cover
- ✓ £50,000 critical illness cover
- ✓ 10 year term

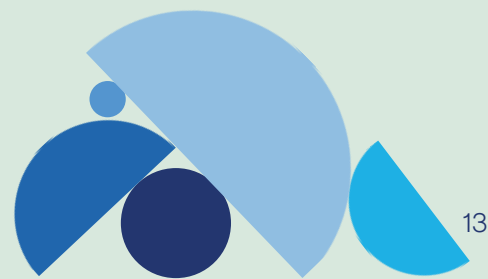
£25.77
a month



Thanks for
updating your
policy.

Congratulations and thank you for choosing Zurich. Your cover has been set up and we'll send you a confirmation email shortly.

You've successfully updated your policy



Finally, it's worth mentioning that depending on when you make your change, you might notice the details shown within your Dashboard are marked as 'Pending change' (see example below). Don't worry, this will be updated automatically on the effective date shown.

Life Protection

Policy number : PRXXXXXXXXXX

Sum assured

£200,000

Policy Active
Single life
Life cover
Level cover
Start date 13/09/2046
End date 12/09/2052

£7.07 a month
✓ 6 year term

Policy number : PRXXXXXXXXXX

Sum assured

£250,000

Pending change
Life cover
Level cover
Start date 13/09/2046
Effective 13/03/2048

£9.25 a month
✓ 6 year term

When you make a change you might see this as 'pending' – this will be updated on the effective date shown

[View policy documents](#)

[Change payment details](#)

[Amend policy](#)



Changing your password

If you need to change your password at any time, you can do this using the 'Change password' option from your Dashboard menu shown below.

From here, you can create a new password quickly and easily following the steps below. Just remember to choose a password that complies with the password criteria specified – it should be:

- At least 8 characters long
- Include at least 3 of the following options:
 - Upper case letters
 - Lower case letters
 - Numbers
 - Special characters (excluding the pound and euro symbols).

Once you've created your password, simply click the 'Update details' button to save it.



Dashboard

Contact details

Change password

Bank details

Documents

Make a claim

Change password

New password

Confirm password

Update details

Password requirements

Your password must have at least 8 characters and include at least three of these four options:


- Upper case letters
- Lower case letters
- Numbers
- Special characters (excluding £ and €)

Click 'Update details' button

Forgotten login details

If you forget your login details, it's quick and easy to reset them.

From the login screen on the Zurich website shown below (or using the link [here](#)), click on the 'Forgotten your details?' section to the top right of the password field.



Sign in

Email

Password


Sign in

[Not currently registered?](#)

Forgotten your details?

Click on 'Forgotten your details?'

This will open up another page, requiring you to enter the email address you originally used to create your account at first registration.



Forgotten your details?

Email

Enter your email address and click on 'Request password reset' button

Request password reset

The image shows a web form for a password reset. At the top is the Zurich logo. Below it is the heading 'Forgotten your details?'. There is a text input field labeled 'Email'. A callout box points to this field with the text 'Enter your email address and click on 'Request password reset' button'. Below the input field is a dark blue button with the text 'Request password reset' in white.

Once you've entered your email address simply click the 'Request password reset' button.

If the email address provided corresponds to an account created, you'll receive an email with instructions enabling you to reset your password.

Always check your junk mail to ensure that our password reset email hasn't snuck in there and, if you're struggling for any reason, feel free to reach out using the contact details shown at the end of this guide – we'll be happy to help.





Making a claim

If you need to make a claim, we'll make it as easy as possible for you to access the help and support required. From your Dashboard, simply select the 'Make a claim' option shown below.

The screenshot shows the Zurich user dashboard. On the left is a sidebar menu with the following items: Dashboard, Contact details, Change password, Bank details, Documents, and Make a claim. The 'Make a claim' item is highlighted with a blue box and a callout that says 'Select 'Make a claim''. The main content area displays policy information for 'Life Protection'. It includes the policy number 'PRXXXXXXXXXX', a sum assured of '£50,000', and a monthly payment of '£25.77 a month' with a '10 year term'. Below this, it states 'Policy Active' with details: 'Single life', 'Life and critical illness cover', 'Level cover', 'Start date 01/05/2019', and 'End date 30/04/2029'. At the bottom of the main area are three links: 'View policy documents', 'Change payment details', and 'Amend policy'. The top right of the dashboard has a 'Sign out' button.

This will take you to the following page where you can read our guide to making a claim, as well as starting the process online via our online claims form.

The screenshot shows the 'Make a claim' page. The left sidebar menu is identical to the dashboard, but 'Make a claim' is now the active section. The main content area has the heading 'Make a claim' followed by a paragraph: 'We understand when you make a claim you will be going through a difficult and emotional time. So we are here to support you and make sure that all valid claims are paid quickly and easily. Once you have registered your claim with us, you'll be assigned a dedicated claims specialist who will deal with you throughout the claim.' Below this is another paragraph: 'For information on how to make a claim, and what to expect at each step of the process, [read our claims guide](#).' The section is titled 'Online claim' and contains the text: 'Just tell us a little about the nature of your claim, and one of our team will give you a call on the number you provided.' At the bottom, there is a dark blue button labeled 'Make a claim' and a callout box pointing to it that says 'Click on 'Make a claim''.

Once you've completed the claim form our friendly team of experts will be in touch to explain the process, talk you through what happens next and what to expect.

To find out more about the process of making a claim, simply click on the hyperlink in the 'read our claims guide' within your portal from the page shown above.

Here to help if you need us

Making a claim can come with its own challenges, so it's worth knowing that your policy benefits from Zurich Support Services.

Our easy-to-access service is designed to help support you through life's ups and downs. From daily worries to major life events, we're here to help if and when you need us, 24 hours a day, 365 days a year.

To find out more, simply download our [Zurich Support Services brochure](#).

How to contact us



Chat with us online at
Zurich website online chat and
look for the 'agent online' icon in
the bottom right-hand corner of the
screen.



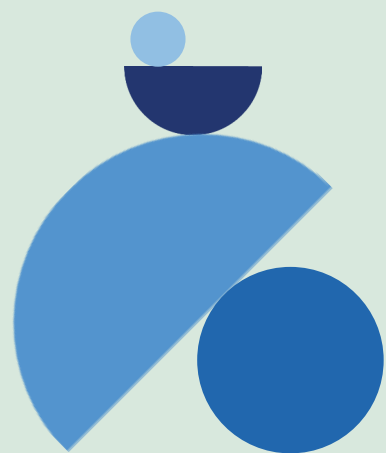
Email us at
life.service@uk.zurich.com



Call us on
0370 850 5682
Monday to Friday 8.30am to
5.30pm (excluding bank holidays).
We may record or monitor calls to
improve our service.



Write to us at
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We may record or monitor calls to improve our service.

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