

# Life Protection Platform

## Onboarding Guide

---

We want to ensure all of our intermediary partners, their advisers and other staff can easily access and use the Life Protection Platform. This guide will provide you with useful information on how to register your firm, administrators, paraplanners and advisers.

Should you need any further support please get in touch with our eSupport team on 0370 850 4419 or the Agency & Remuneration team on 0800 151 3333.

### Steps to register on the Life Protection Platform

There are three key steps you will need to complete to register on the platform.

1. Origo agency request (via Origo Services Limited and sign up to the Zurich Terms of Business (unless you are already registered).  
<https://agencyreg.origoservices.com/MainPages/Welcome.aspx>
2. Register for Zurich Services and create your username (unless you are already registered).  
<https://signin.zurichintermediary.co.uk/createuser>
3. Register Firm/Administrator on the platform

**We recommend that you use Google Chrome when completing the registration journey.**

### The roles on the system

**Adviser:** Advisers can quote and apply, submit new business, review the pipeline, activate policies and enact contractual changes on their clients' policies.

**Paraplanner:** Paraplanners can have access to all or specified advisers in their firm to work on their behalf. They cannot set up other para-planners or administrators or manage their own rights or permissions.

**Administrator:** This is a "Super User" role with the ability to set up new additional administrators and assign and manage paraplanner access to individual advisers. **Only administrators can view commission statements.**

All firms should have **at least one** administrator. We recommend that you have more than one administrator.

Please get in touch with our Agency & Remuneration team on **0800 151 3333** if you have an existing account without an administrator.

The administrator cannot quote and apply for business, unless they give themselves paraplanner rights. For sole trader firms we recommend that the administrator account is set up with paraplanner rights and authorised to process business on behalf of the adviser account. The adviser will still need to register as an adviser.

Any advisers who require both administrator and adviser access will still need to register themselves separately as an adviser. This will require the creation of a second username.

**To register a firm on the platform you must first set up an administrator before adding paraplanners and advisers.**

## Firms with an existing active Zurich Agency Relationship

As part of the firm set-up process we will need details of at least one administrator.

If a new administrator is being set up and is an existing Zurich Services user, there is an option to use your current credentials for Life Protection Platform access or your Unipass account or certificate.

## Firms that are new to Zurich or do not have an active Zurich Agency Relationship

1. Start the process through the Origo agency request (via Origo Limited) and sign up to the Terms of Business by [clicking here](#).
2. We will complete our due diligence process within 5 working days ahead of you registering for Zurich Services after which you can proceed immediately to quoting and applying for business.
3. For administrators of new firms that have completed Zurich due diligence you will need to follow these steps:
  - Register for Zurich Services and create your username.
  - Once authorised the next time you log in you will be able to access the Life Protection Platform to set up the firm.

### Registering for Zurich Services

Username/password: <https://signin.zurichintermediary.co.uk/createuser>  
(for more information, see Register for Zurich Services section)

Unipass: <https://idp.zurichintermediary.co.uk/sso/saml2/0oa2y3vpvrTMRfzpFOiZ>

4. Once Zurich Services registration is complete you can then proceed to set up the administrator and firm details on the platform.

## Administrator registration

Regardless of whether the administrator being set up is an existing user or not they will enter their details on the same screen.

This will then allow firms to create the hierarchy between the advisers and paraplanners that they require. For example, a firm may decide that it wants all of its paraplanners to be aligned to and work across all advisers or alternatively to align paraplanners to certain advisers (refer to Paraplanner registration).

**We recommend that you set up more than one administrator and give them paraplanner rights as well if appropriate.**

Please note that Appointed Representative firms cannot be set up on the Life Protection Platform until their FCA authorised Principal firm has completed the registration process and has been activated.

**To start the registration process, access the following link and follow the appropriate journey:**

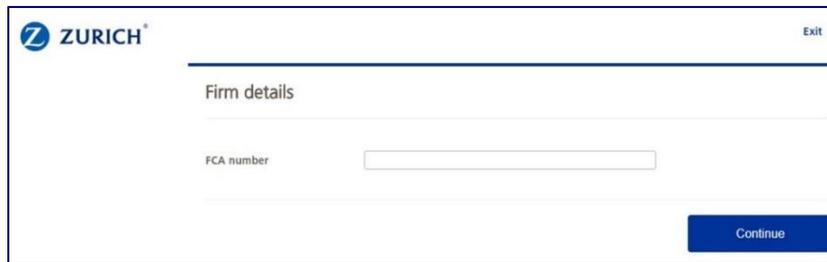
**<https://www.zurichintermediary.co.uk/en-gb/protection/registration>**

The firm registration process should only be completed by someone with the authority to act on behalf of the registering firm and accept terms of business/use. Please don't start the process until you have created an appropriate Username for the purpose of fulfilling the administrator role.

## Firm registration

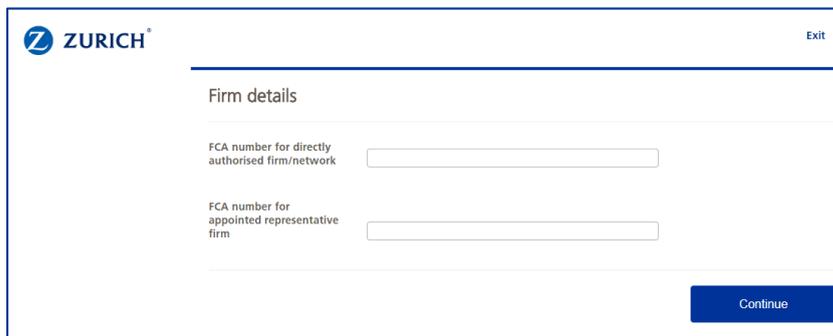
1. You will need to enter your firm's FCA/FRN number.

a. Directly Authorised (DA) Firm



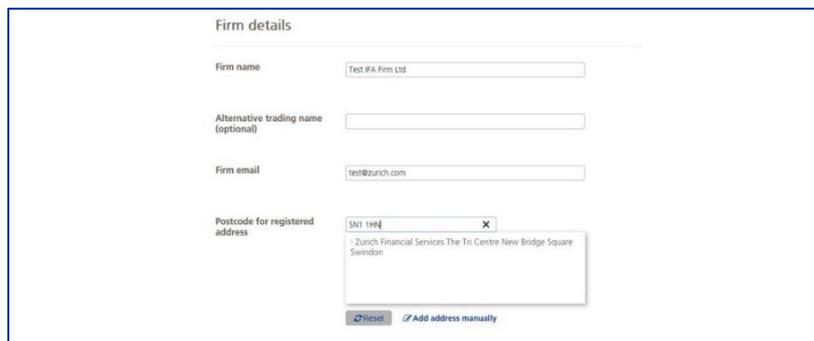
The screenshot shows the Zurich firm registration interface for a Directly Authorised (DA) Firm. At the top left is the Zurich logo, and at the top right is an 'Exit' link. The main heading is 'Firm details'. Below this, there is a single text input field labeled 'FCA number'. At the bottom right of the form is a blue 'Continue' button.

b. Appointed Representative (AR) Firm



The screenshot shows the Zurich firm registration interface for an Appointed Representative (AR) Firm. At the top left is the Zurich logo, and at the top right is an 'Exit' link. The main heading is 'Firm details'. Below this, there are two text input fields: the first is labeled 'FCA number for directly authorised firm/network' and the second is labeled 'FCA number for appointed representative firm'. At the bottom right of the form is a blue 'Continue' button.

2. Once your firm is identified by your FCA number, you are asked to fill in your e-mail address and postal address (either by postcode look up or by entering manually).



The screenshot shows the Zurich firm registration interface for filling in firm details. The heading is 'Firm details'. There are four text input fields: 'Firm name' (containing 'Test #A Firm Ltd'), 'Alternative trading name (optional)', 'Firm email' (containing 'test@zurich.com'), and 'Postcode for registered address' (containing 'SN1 1HN'). A dropdown menu is open for the postcode, showing a search result: 'Zurich Financial Services The Tri Centre New Bridge Square Swindon'. At the bottom of the dropdown are two buttons: 'Reset' and 'Add address manually'.

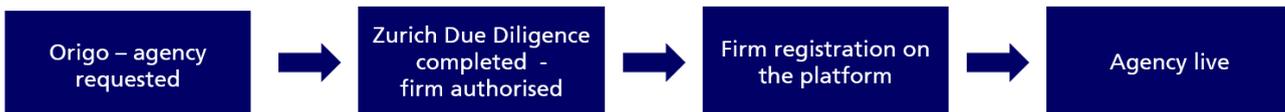
3. You will be given the opportunity to capture a different correspondence address or to confirm that you wish to use the registered address for correspondence. In addition, you can indicate your correspondence preference, by post or e-mail.

4. The next screen offers you the opportunity to determine the payment frequency for commission and the bank account you wish the commission to be paid into. Please note, if you are an Appointed Representative of another firm this screen is not displayed, the payment details are set by the FCA Principal firm.

The screenshot shows a form titled "Payment frequency" with two radio buttons: "Weekly" (selected) and "Monthly". Below this is a "Payment day" dropdown menu set to "Wednesday". The "Address" section has two radio buttons: "Registered Address" (selected) and "Correspondence Address". The "Bank details" section includes three input fields: "Account name" with the value "test account", "Account number" with the value "00003634", and "Sort code" with three boxes containing "07", "01", and "16". At the bottom right, there are "Back" and "Continue" buttons, with a mouse cursor pointing at the "Continue" button.

5. Next you are asked to capture your preference regarding the commission payable. (Please note, whilst commission preferences can be indicated, these may be subject to change at the conclusion of our internal due diligence processes).
6. You will then need to fill in the administrator details and confirm that you accept the Terms of Business.

The screenshot shows a "Terms of business" screen. It contains the following text: "Thank you for choosing Zurich. In order to complete your registration, please click on the 'Register' button below. If you are a directly authorised firm and have not previously established a relationship with Zurich, you will also need to complete our [online agency application](#) hosted by Origo Services Ltd. By registering you will agree to our [terms of business](#)." Below this text is a checkbox that is checked, with the text "I confirm that the firm administrator and any paraplanner setup here have agreed to the terms of use for the Zurich Life Protection Platform." At the bottom right, there is a blue "Register" button with a mouse cursor pointing at it.



## Paraplanner registration

### Existing Registered users

If a new paraplanner who is being set up has previously registered for Zurich Services, there is an option to use their current credentials to access the Life Protection Platform or their Unipass account.

If they can't remember their current username, or they sign in with a Unipass certificate, they can contact eSupport for details on 0370 850 4419.

### New Users

#### Registering for Zurich Services

Username/password: <https://signin.zurichintermediary.co.uk/createuser>

(for more information, see Register for Zurich Services section, below)

Unipass: <https://idp.zurichintermediary.co.uk/sso/saml2/0oa2y3vpvrTMRfzpFOi7>

The administrator will enter the new paraplanner details from the Firm Administrator screen by selecting the Set up additional paraplanner button:

Include paraplanner rights  Yes  No

Set up additional paraplanner  Yes  No

Paraplanner details

First name

Surname

Email

Zurich Services username   
If you don't have a Zurich Services username, or wish to know more, then [SSO2E.NHS](#)

Please note: Unipass users will still have a Protection Hub username. If you do not know your current username, information on how to retrieve it can be found [here](#).

Contact number

Paraplanners can either be assigned access to all advisers or restricted to one or more advisers depending on requirements.

**Where a paraplanner is aligned to a specific adviser(s) they will only be able to act on behalf of those advisers.**

Hi, Admin Advisor Documents Contact us Sign out

My policies  
My actions & notifications  
My statements  
My documents  
Administration  
My account

**ZURICH**

Maintain Paraplanner

Add administrator Add paraplanner Maintain paraplanner rights

Maintain Paraplanner access rights

First Name

Surname

Search

ID	First Name	Surname	Address Line 1	Post Code	Phone Number
Z31567898A	Pats	Palmer1	37 Cummings Park Drive	AB16 7BA	02145436

Maintain Adviser access for Paraplanner

Parent Firm	Parent Firm Type	Name	Access Allowed?	Default
F20090G5001	AGT	firmuser three F20090G5001	<input type="checkbox"/>	<input type="checkbox"/>
F20090K1001	AGT	firmuser F20090K1001	<input type="checkbox"/>	<input type="checkbox"/>
F20090KW001	AGT	firmuser F20090KW001	<input checked="" type="checkbox"/>	<input type="checkbox"/>
F20090KY001	AGT	firmuser F20090KY001	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Save

Once in place, the administrator can add additional administrators and paraplanners or assume paraplanner rights themselves. Please note that paraplanners have access to more functionality than an administrator.

## General Points

- One paraplanner can be set up as part of the firm set up
- A paraplanner cannot do anything (e.g. quote etc.) until there is an active adviser on the firm
- All subsequent paraplanners must be set up by an existing administrator
- There is no limit to the number of paraplanners that can be set up under a firm.

## Administrator registration

### Existing Registered users

When a new administrator is being set up and is already registered for Zurich Services, there is an option to use their current credentials for the Life Protection Platform access or their Unipass account.

If they can't remember their current username, or they sign in with a Unipass certificate, they can contact eSupport for details on 0370 850 4419.

If they act as both an adviser and the firm administrator and have an existing Unipass ID we recommend that they use this for the adviser account.

### New users

For new administrators who are not existing Zurich Services registered users the set-up is as follows:

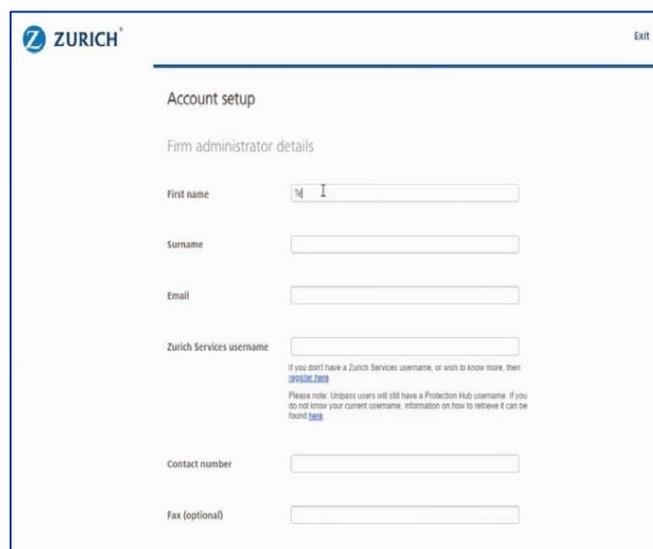
- Register for Zurich Services and create your username (this is then entered onto the administrator set up screen). Once authorised, the next time you log in you will have access to the Life Protection Platform.

## Registering for Zurich Services

Username/password: <https://signin.zurichintermediary.co.uk/createuser>  
(for more information, see Register for Zurich Services section, below)

Unipass: <https://idp.zurichintermediary.co.uk/sso/saml2/00a2y3vpvrTMRfzpFOi7>

Regardless of whether the administrator being set up is an existing user or not, they will enter their details on the below screen:



The screenshot shows the 'Account setup' page for a Zurich firm administrator. The page has the Zurich logo in the top left and an 'Exit' link in the top right. The main heading is 'Account setup'. Below it is the section 'Firm administrator details'. The form contains several input fields: 'First name' (with a cursor in the field), 'Surname', 'Email', 'Zurich Services username', 'Contact number', and 'Fax (optional)'. There is a small note below the 'Zurich Services username' field: 'If you don't have a Zurich Services username, or wish to know more, then [click here](#). Please note: Unipass users will still have a Protection Hub username. If you do not know your current username, information on how to retrieve it can be found [here](#).' The form is enclosed in a blue border.

## Adviser registration

### Existing Registered users

Advisers who have previously registered for Zurich Services can log on using their current credentials (username and password or Unipass). When they try to access the Life Protection Platform for the first time, they will be asked to go through a set up process.

If you can't remember your current username, or you sign in with a Unipass certificate, you can contact eSupport for details on 0370 850 4419.

If you act as both an adviser and the firm administrator and have an existing Unipass ID we recommend that you use this for your adviser account.

### New users

#### Registering for Zurich Services

Username/password: <https://signin.zurichintermediary.co.uk/createuser>  
(for more information, see Register for Zurich Services section, below)

Unipass: <https://idp.zurichintermediary.co.uk/sso/saml2/0oa2y3vpvrTMRfzpF0i7>

If you get an error message please click on the link to update your certificate.

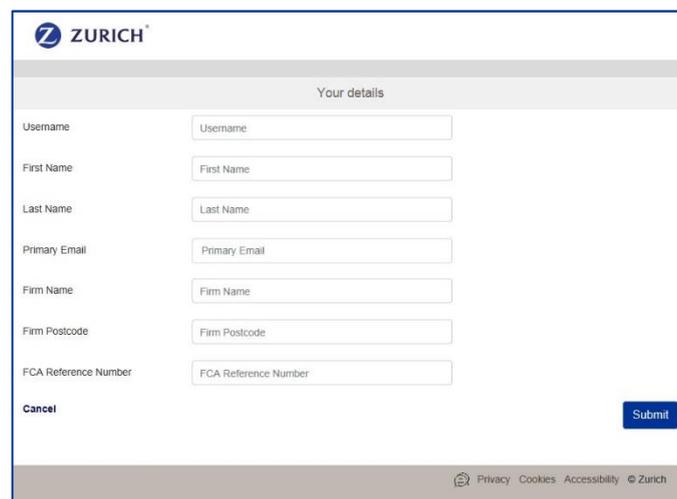
When you try to access the Life Protection Platform for the first time, you will be asked to go through a set-up process.

### General Points:

- It is not possible to quote on the platform without first being registered unless you are using a portal like Solution Builder.
- Advisers are restricted to working under one firm (by FCA number) per username. The same username cannot give access to multiple firms or users under a firm.
- When the adviser accesses the platform for the first time they will see the FCA number they've entered when setting up their account. This must be the FCA number for the firm they wish to submit business under. If the details in Zurich Services are incorrect, the adviser will need to re-register using the correct credentials.
- If the adviser works for an Appointed Representative firm they will need to provide us with their local FCA number.
- Some details that the adviser has already provided when setting up their username or Unipass account will be pre-populated on the platform set up for ease of use.
- The adviser will be asked to sign up to the adviser portal terms of use as part of their registration.
- Once registration is complete, the adviser will land straight in the adviser portal and can start to quote and apply.

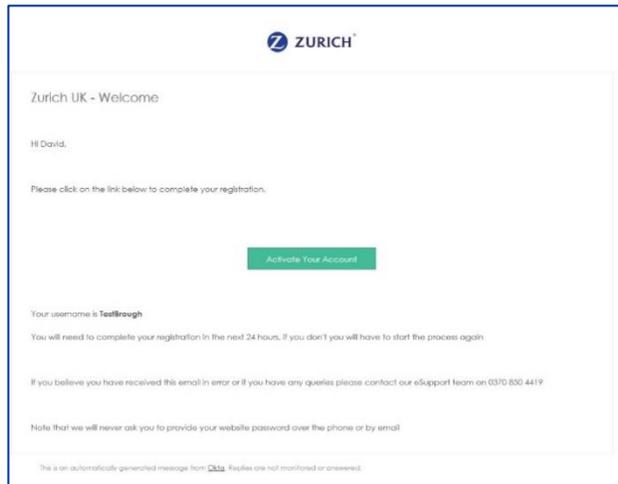
## Life Protection Platform user registration

1. The adviser needs to register for a Zurich Services username.



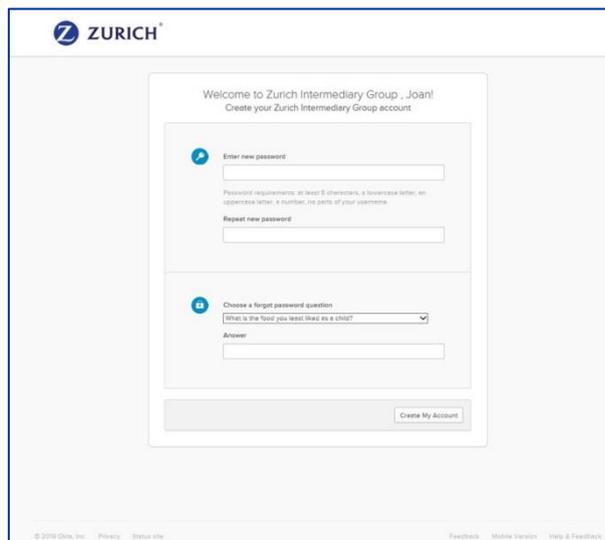
The screenshot shows a registration form for Zurich Services. At the top left is the Zurich logo. The form is titled "Your details" and contains several input fields: Username, First Name, Last Name, Primary Email, Firm Name, Firm Postcode, and FCA Reference Number. Each field has a corresponding label to its left. At the bottom left of the form is a "Cancel" link, and at the bottom right is a blue "Submit" button. At the very bottom of the page, there is a footer with icons for Privacy, Cookies, and Accessibility, followed by the text "© Zurich".

- The adviser will receive an email inviting them to complete the registration.

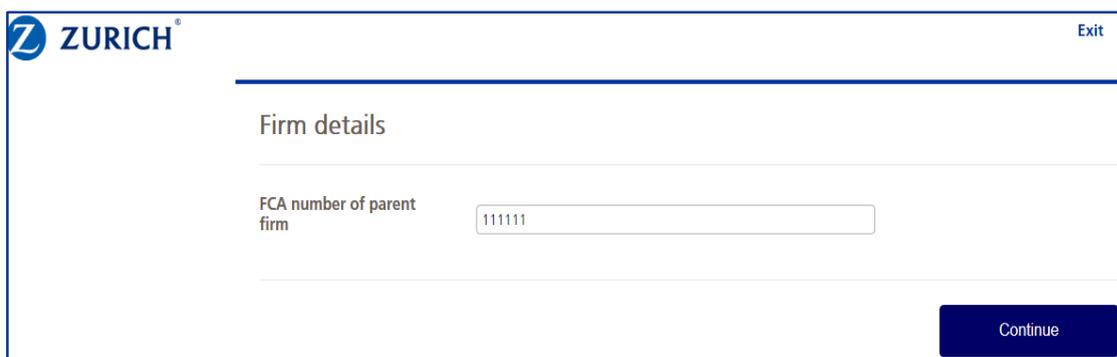


**You don't need to double-click on the Activate Your Account button.**

- The next step is to set up their password and their security question. They can use the same password if they have multiple accounts.



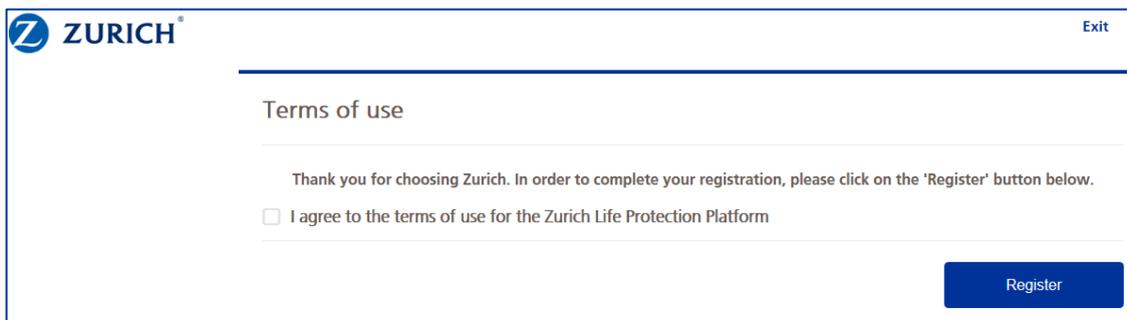
- The adviser needs to confirm their firm's FCA number. This will be read-only for users already registered with Zurich Services. If the adviser works for an Appointed Representative firm, they'll need to enter their local FCA number.



5. The adviser will need to provide their contact details. The default correspondence address will be the FCA registered address but the adviser can provide us with a different address.

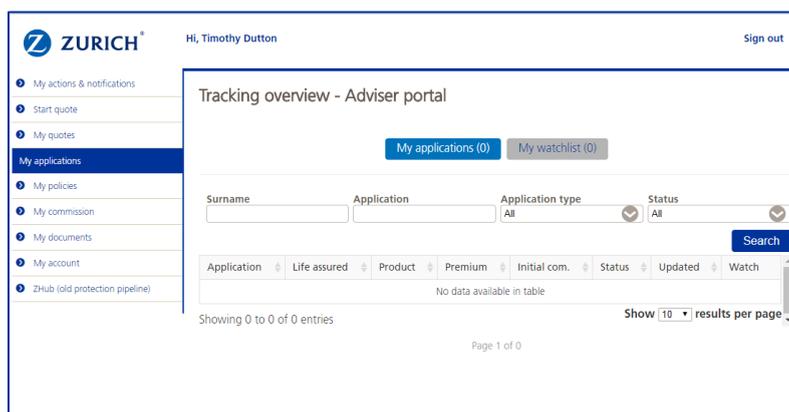
6. The adviser will need to indicate their notification preference. We recommend that they select 'Yes' for all alerts. This can help advisers determine which notifications are of value to them. They can change the notification preferences at any time.

7. In order to complete the registration, the adviser will need to agree to the terms of use for the Life Protection Platform.



The screenshot shows the Zurich 'Terms of use' registration page. At the top left is the Zurich logo and 'ZURICH' text. At the top right is an 'Exit' link. The main heading is 'Terms of use'. Below this is a message: 'Thank you for choosing Zurich. In order to complete your registration, please click on the 'Register' button below.' There is a checkbox labeled 'I agree to the terms of use for the Zurich Life Protection Platform' which is currently unchecked. At the bottom right is a blue 'Register' button.

8. They can now access the portal and start a quote.



The screenshot shows the Zurich Adviser portal 'Tracking overview'. At the top left is the Zurich logo and 'ZURICH' text. At the top right is the user name 'Hi, Timothy Dutton' and a 'Sign out' link. A left-hand navigation menu includes: 'My actions & notifications', 'Start quote', 'My quotes', 'My applications' (highlighted), 'My policies', 'My commission', 'My documents', 'My account', and 'ZHub (old protection pipeline)'. The main content area is titled 'Tracking overview - Adviser portal' and contains two buttons: 'My applications (0)' and 'My watchlist (0)'. Below these are search filters for 'Surname', 'Application', 'Application type' (set to 'All'), and 'Status' (set to 'All'). A 'Search' button is to the right. Below the filters is a table with columns: 'Application', 'Life assured', 'Product', 'Premium', 'Initial com.', 'Status', 'Updated', and 'Watch'. The table is currently empty with the text 'No data available in table'. At the bottom, it says 'Showing 0 to 0 of 0 entries' and 'Page 1 of 0'.

For intermediary use only – not for use with your clients.

Zurich Assurance Ltd, authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Registered in England and Wales under company number 02456671. Registered office: The Grange, Bishops Cleeve, Cheltenham, GL52 8XX.

We may record or monitor calls to improve our service.

