ReAssure

What can we help with?

Help for Advisers

Q. Where can I find out more information about the move from Adviser View, for ReAssure Life (former Old Mutual Wealth Life Assurance) policies?
You can read more about the changes and frequently asked questions on our Adviser Hub.

Q. How do I view a client's policies?
You'll need to use the 'Add a client' feature to search for policies that you're authorised to view, then they'll be added to your Clients list. If the client details you enter match our records we'll add them to your Clients list and display all policies where you're the servicing agent. You'll only need to do this once for each client.

Q. I can't view all of the policies that I have authority for
As this is a new service, some policies aren't available on ReAssure Now yet and we'll be gradually adding more. You'll still be able to find the policies but you won't be able to view policy information until they're available.

Q. I'm searching for a policy that I know exists but the search has been unsuccessful
Check that the information you're entering is correct and if you're sure it is, you can call us on 0800 073 1777 between 8:30am and 5:30pm Monday to Friday.

Q. I'd like to request full policy details on my client's policies.
The majority of information that we'd provide in a full policy details response can be found on ReAssure Now, such as policy values, any cover, how much is paid in and how much the policy costs. You can download policy information for all available policies on your ReAssure Now Clients list as a CSV file, which can then be easily exported to your own system. If you want information about anything that's not available on ReAssure Now, you can still request this from us.

Q. Does the client need to have activated their ReAssure Now account before I can view their policy information?
It doesn't matter whether the policyholder has activated their account or not, you can search for and access information about the policies that you hold authority for. We'll display whether each client on your list is registered for ReAssure Now or not.

Q. Can I see clients' personal information?
You can only see policy information for policies that you hold authority for.

Q. Where can I find the latest ReAssure Now Terms of Use?

You can view the most up to date ReAssure Now Terms of Use **here**

ReAssure

Help for ReAssure Now Administrators

Q. What can ReAssure Now Administrators do on ReAssure Now?
The ReAssure Now Administrator plays an important role in the day-to-day management of your company's ReAssure Now accounts. Your key responsibilities will be

- Adding colleagues from your company as ReAssure Now users.
- Updating Users' accounts, such as requesting changes to their business contact details by sending us a secure message.
- Removing ReAssure Now access if a colleague leaves your company or they should no longer have an account.
- Switching on or off a data feed of policy valuations data to an approved third party software provider.
- Completing an annual attestation, where required, to make sure that all ReAssure Now User accounts are still required and all details are up-to-date.

You can also search for clients and add their policies to a Clients list, view policy information and also send and view secure messages.

Q. How do ReAssure Now Administrators give access to ReAssure Now Users?
You can add new ReAssure Now users by selecting **Add a User**. This can either be a ReAssure Now User, who can view clients' policies, or a Commission User, whose access is limited to commission statement information.
When adding ReAssure Now users' details, you must provide their full name and business contact details (including a valid business email address, landline and mobile numbers). Their contact details will be available to all your company's users, which is why you must not add personal information that isn't associated with the company.
We'll automatically send an invitation letter based on the information you've entered and all ReAssure Now users will be added to the Users list. The invitation letter contains a unique invitation code that each user needs when they register.

Q. Can ReAssure Now Administrators see who else from their company is registered on ReAssure Now?
You can view details of all users from your company who have been invited to register and whether they've activated their account or not.

Q. Can ReAssure Now Administrators see clients and secure messages that all users from their company have added?
Whether you can see all clients and secure messages added by your company's users, or just those you have added depends on the type of access chosen by your company – **Individual** or **Company**:

Individual

- The ReAssure Now Administrator and any ReAssure Now Users for the company each create their own Clients list on ReAssure Now and will only be able to see information about the clients' policies they've added.
- A client can be added to the Clients list of more than one user, and although each user can see the same policy information, they will only see the secure messages they personally have sent (and any ReAssure replies to those).

Company

- The ReAssure Now Administrator and any ReAssure Now Users for the company will add clients' policies to a company Clients list and be able to see any clients, along with their policies, that have been added. They'll also see which user added the clients and view secure messages, along with any ReAssure replies, that users have sent about those clients.

A Commission User can only view commission statement information. They have access to **Adviser Documents** but not to clients, policies or secure messages.

Q. Can ReAssure Now Administrators change their own details on ReAssure Now?
Although Adminstrators can update other users' accounts through ReAssure Now, they can't update their own. The Authorised Persons for your company (your company Director, Chief Executive, Partner, where applicable, or Compliance Oversight function holder) will need to confirm the change of details. Please send us a secure message, or call us, and we'll confirm what we need your company to do.

Q. What happens if the ReAssure Now Administrator needs to change?
The Authorised Person(s) for your company (your company Director, Chief Executive, Partner, where applicable, or Compliance Oversight function holder), will need to confirm the details of the new ReAssure Now Administrator. Please send us a secure message, or call us, and we'll confirm what we need your company to do.

Help for ReAssure Now users

Q. What can ReAssure Now users do on ReAssure Now?
ReAssure Now users can add clients, view policy information and send and view secure messages about those clients. Whether you can see all clients and secure messages added by any users from your company or just those you have added depends on the access type chosen by your company (explained below).

A Commission User can only view commission and payment statement information. They have access to **Adviser Documents** but not to clients, policies or secure messages.

Q. Can ReAssure Now users see who else from their company is registered on Reassure Now?
You can see the business contact details of any ReAssure Now users that your ReAssure Now Administrator has added. You can also see the ReAssure Now Administrator's details in case you need to contact them for help with your ReAssure Now account.

Q. Can ReAssure Now Users see clients and secure messages that all users from their company have added?
Whether you can see all clients and secure messages added by your company's users, or just those you have added depends on the type of access chosen by your company – **Individual** or **Company**:

Individual

- The ReAssure Now Administrator and any ReAssure Now Users for the company each create their own Clients list on ReAssure Now and will only be able to see information about the clients' policies they've added.
- A client can be added to the Clients list of more than one user, and although each user can see the same policy information, they will only see the secure messages they personally have sent (and any ReAssure replies to those).

- This is unless a User has been given access that's limited to commission information only, and can't view clients, policies or secure messages.

Company

- The ReAssure Now Administrator and any ReAssure Now Users for the company will add clients' policies to a company Clients list and be able to see any clients, along with their policies, that have been added. They'll also see which user added the clients and view secure messages, along with any replies, that any users have sent about those clients.
- This is unless a User has been given access that's limited to commission information only, and can't view clients, policies or secure messages.

Q. Can ReAssure Now Users change their own details on ReAssure Now?
You'll need to contact your ReAssure Now Administrator, who is responsible for keeping ReAssure Now Users accounts up to date. e.g. if you've changed your name or business email address, your ReAssure Now Administrator will update these through ReAssure Now by sending us a secure message. Your company's Users list will show who the ReAssure Now Administrator is and their contact details.

Help for ReAssure Now Commission Users

Q. What can ReAssure Now Commission Users do on ReAssure Now?
Commission Users can view Adviser Documents which relate to their company's commission and payment statement information. Commission Users can't add clients, view clients' policy information or send and view secure messages.

If your company wants to be able to view commission payment information online, the ReAssure Now Administrator will need to invite someone to be a Commission User. They can do this through the **Add a User** feature, using only the individual's business contact information to create their account.

Q. What commission and payment information can Commission Users view?
Commission Users will be able to view and download PDFs of their company's commission and payment statements.
Users can check whether a CSV file exists for a statement as the 'Export CSV' button will be enabled on the document toolbar, once they've selected to view a statement. A CSV file is a text file which enables you to export the statement information to a spreadsheet application.

Not all statements are currently available in a CSV format, including all historic statements.

If your company previously received commission and payment statements by secure email, once a Commission User has been set up on ReAssure Now you'll no longer receive them by this method. Your company will continue to receive statements in the post.

Help with ReAssure Now features

Portfolios

Q: What are Portfolios?
Portfolios enable you to group your chosen funds together and then link clients' policies to them, to help you manage your clients' investments online. You can then switch multiple

policies to a particular fund or set of funds without having to do this for each policy individually. You're able to view and maintain existing portfolios as well as create new ones.

Q: Who can view portfolios?
Portfolios are currently only available for ReAssure Life (formerly Old Mutual Wealth Life Assurance) policies, so that Financial Advisers who previously had portfolios in Adviser View will still be able to manage them in ReAssure Now. ReAssure Now Administrators and ReAssure Now Users are able to manage these portfolios, but Commission Users can't view them as their role is limited to commissions information.

Q: What if I need help to manage a portfolio?
You can change the funds and/or policies linked to existing portfolios in ReAssure Now and update the name and descriptions too. If you've receive any error messages which you're unsure about you can send us a secure message. Our Customer Service teams are unable to access or maintain your portfolios as they are an online only feature.

Q: Can I view all policies within in a portfolio?
To view policies within existing portfolios or link them to a new one, you'll need to have the relevant clients in your Clients list. If your company has requested that users have an Individual view in ReAssure Now, you'll only be able to view the policies linked to a portfolio that are in your individual Clients list. Administrators and Users with a Company view will be able to see all policies linked to all portfolios.

Q: Why does my portfolio have a status of 'Incomplete'?
Portfolios are complete once they have a name, description, product type (life or pension), and the fund allocation equals 100%. If any of these items are missing, the portfolio will have a status of 'Incomplete' and you're unable to add new policies to it. You may already have some policies within incomplete portfolios, but you can only add new policies once the portfolio status is Complete.

Third-party data feeds

Q. What is a third-party data feed?
Third-party data feeds give Financial Adviser firms the option to allow ReAssure to send bulk policy valuation information using a secure data feed, facilitated by an authorised third-party service provider. This allows you to integrate bulk policy valuations with your own Client Relationship Management software, without having to log into ReAssure Now every day to access them individually.

Q. Which third-party service provider will be supporting policy valuations data?
We'll be using **Intelliflo Office** and you'll need an Intelliflo account if you want to access ReAssure policy valuations through them. At the moment we aren't enabling, or continuing to support bulk policy valuations through any other third-party service providers when the Adviser View portal closes, but we're continually reviewing our online services and may expand the supported providers over time.
We're using Intelliflo as a large number of Financial Advisers firms moving from the Adviser View portal to ReAssure Now already use their service to access policy valuations data

Q. Who can use the third-party data feed?

Your nominated ReAssure Now Administrator will have control over the data feed and be able to switch it on or off within their ReAssure Now account at any time, for all available users within your company.

Q. How do I enable the third-party data feed?
Once the feature is available, there will be two separate steps that your ReAssure Now Administrator needs to complete before any data can be shared:

- **enable the data feed within their ReAssure Now account**
  Once logged into their ReAssure Now account, they'll need to read and accept the updated ReAssure Now Terms of Use and enable the Intelliflo data feed through the Manage area of ReAssure Now.

- **install the ReAssure app within the Intelliflo Store**
  If your company doesn't currently have an Intelliflo account, you'll need to get in touch with Intelliflo.com to arrange this separately. ReAssure isn't responsible for any costs of setting up an account with a third party.

Once enabled, bulk valuations will automatically be provided by secure data feed from ReAssure from the next available date and will include all available ReAssure Now policies that your company has authority to represent.

Q. What if I don't want to use this feature?
The data feed will be switched off by default and no data will be shared unless your ReAssure Now Administrator enables it within their ReAssure Now account, by following the steps detailed above. If you don't wish to use this feature, you can simply choose to leave the data feed switched off. Once enabled, the ReAssure Now Administrator can switch the feed off at any time.