Canada Life Portal

Administration Guide

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Welcome to the Canada Life Portal Administration Guide

This Administration Guide for central or local administrators will take you through the simple process of how to provide access to other users within your organisation.

+ Adviser Connect - both onshore and offshore
+ The Retirement Account Dashboard

Canada Life can allocate access rights to you or your users. Then if you are the first central administrator for your organisation, you will need to enter the Administration Zone (through Adviser Connect) and allocate your required access. This includes both roles and agency numbers you require.

We would strongly recommend that you allocate another role of central or local administrator for your organisation or office. Local administrators can also amend access rights for their area. This will ensure that if you are unavailable there will be alternative administrator cover to continue authorising requests for access. It is recommended the number of administrators allocated should be appropriate and not be made too widely available to ensure an effective control is maintained.

This Administration Guide will cover all the functions within the Administration Zone, however, if you have any additional queries, please contact our **Service Support Team on 0345 606 0708.**

To access the Administration Zone you can either:

+ Click the link contained in any new registration email that you receive each time a new user from your organisation requests registration
+ Log in to Adviser Connect in the Canada Life Portal and click on the Administration Zone*

*Not available for The Retirement Account Dashboard

Main tasks of an Administrator

+ Act as a point of contact between your organisation and Canada Life regarding our Adviser Connect zone.

+ Allocate and update access rights for users within your organisation.

+ Add or delete other administrators. An administrator cannot revoke their own access and there must be a minimum of one active administrator per organisation.

+ Deleting or suspending profiles that are no longer required or will not be used for a period of time for example, leavers, or people on extended leave of absence.

Types of Administrators

There are two types of administrator that can be set up within an organisation; central or local. The first administrator will be set up by the Canada Life Service Support team and will always be a central administrator.

If your organisation has a main office with additional branches, a central administrator may choose to allocate local administrator roles. Local administrators can also amend access rights for their area. This will ensure that there are sufficient administrators to allocate access within each branch. Once a local administrator is allocated, central administrators no longer have these rights.

Everytime an amendment is made through the Administration Zone an email will automatically be sent to the user informing them of the update.
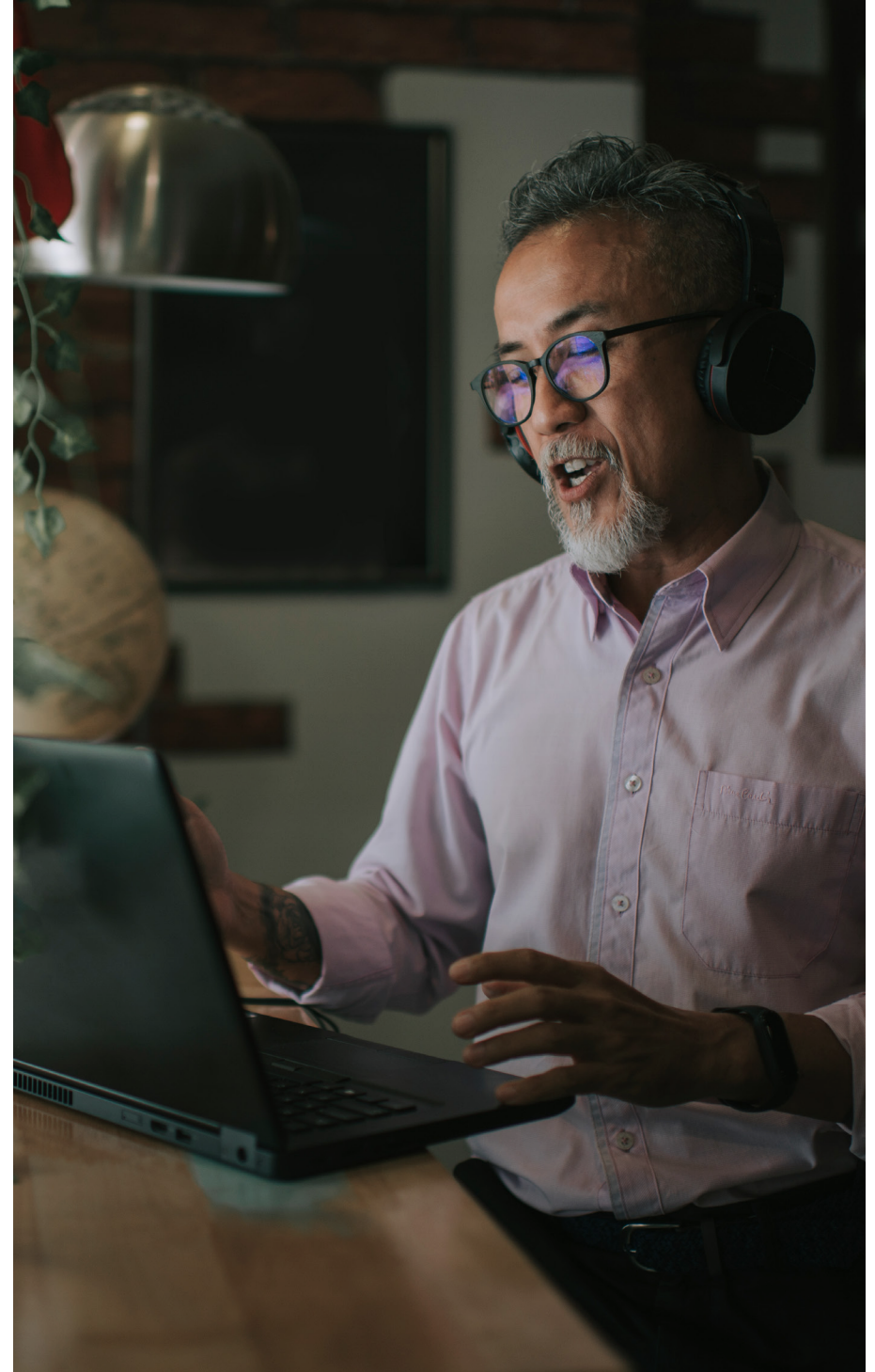
How to manage Portal access

Please select 'Administration Zone' in your top navigation to show Registration Requests and Search options for other users of the Portal in your organisation.

+   Registration Requests

This is a queue of all users within your group that have completed a request to register and now require you to authorise or decline their access. You can sort this list by request date or postcode.

The first time you login to the Administration Zone Home Page you may see users in your 'Pending Registration Request' queue. You will not have received an email notification of these users as they will have requested to register prior to your allocation of the administrator role.

+   Refresh Button

Log in to the Administration Zone and select the 'Refresh' button, to update the 'Pending Registration Request' queue with any users who may have registered since you have been logged in.

+   Search for Registered Users

By selecting this link a page will be displayed to enable a search for users that have already completed the registration process within your group.
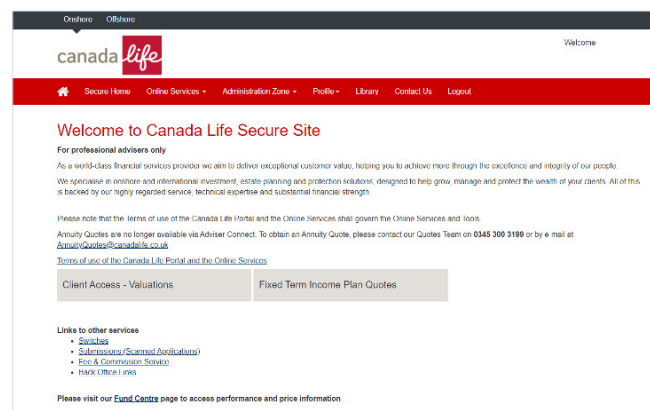
Central administrators are responsible for allocating roles to all users from their organisation. If the role of local administrator is allocated to a user, that user will drop down into the 'Awaiting Completion of Registration by User' queue together with anyone else using the same postcode.

It then becomes the responsibility of the local administrator to complete their registration and allocate roles to the users.

By selecting the 'Approve' button within the 'Pending Registration Request' section this displays the 'Assign Roles and Agency Numbers' page that splits into the following sections:

Functions

+ User Details

Confirms that you have selected the correct user.

+ Roles

Allows the selection of the relevant role(s) for the user.

Should you require more information regarding the description of roles please click on 'Roles Description' icon in the top right hand corner of the screen. Multiple roles may be allocated to a user but only one administration role can be allocated.

+ Agency Numbers

Allows the selection of agency number(s) the user will have access to.

The administrator can request access to agency numbers for Portal users in their company. This is approved by Canada Life and takes up to 3 days to process. Approved users will then be sent an automatic email that contains:

– The role(s) they have been allocated

– The agency number(s) they have been allocated access to

– A link that once selected will enable them to complete the last stage of their registration

– Your contact details as administrator

External Roles and Access

A list of each role description can be seen in the following table:

Role	Client Access - Valuations	Commissions	Update User Access
Registered Individual (adviser or paraplanner)	✓		
Commission Access		✓	
Local Administrator			✓
Central Administrator			✓

Access to The Retirement Account Dashboard will be available to all users after being set up as a Registered Individual. Users can register, log in, view.

Administrators can provide additional access, including commissions/fees and policy documentation for Adviser Connect.

Commission/Fees Access Role

If a user has the 'Commissions' role applied to their profile, the individual will start to receive electronic Commission/Adviser Fee statements for new and existing business. The statements will be sent by email in CSV format, weekly (or monthly depending on preference) for Canada Life Onshore.

It is recommended where possible that more than one user is granted commission/fees access to cover for absences and so on.
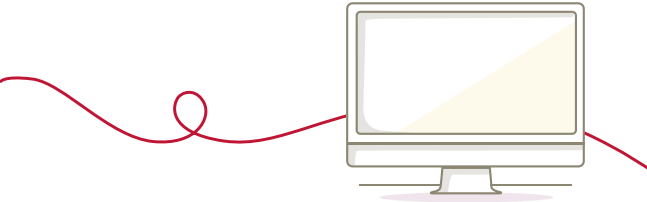
Decline Screen

Selecting the 'Decline' button within the 'Pending Registration Request' section will display the following 'Confirm Decline' page.

Once a user has been declined, an automatic email will be sent together with your contact details should they need to contact you.
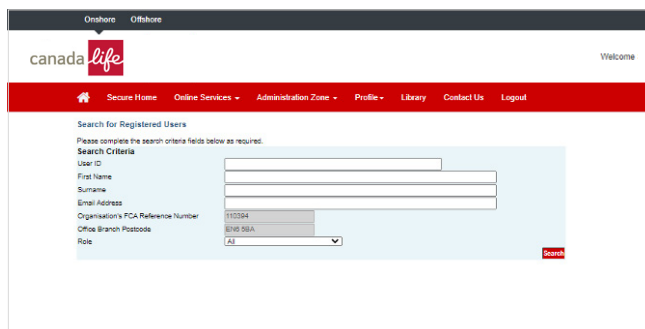
This function can be used to search for registered users within a group using one or more of the following criteria below. Only users that have completed registration will appear in the results. If the link is in grey, this means that access is waiting for approval.

+ **User ID**

+ **First name**

+ **Surname**

+ **Email address**

+ **FCA Reference Number**
  This will be pre-populated and shaded grey as you are only permitted to search/see your own organisation's user details.

+ **Office/Branch Postcode**
  This will be pre-populated and shaded grey for all local administrators as you are only permitted to search/see your own organisation's user details with the same organisation FCA Number and postcode.

+ **Role**
  This is a drop down box with the following options: All, local administrators, central administrators or both administrators.

You can search using one or more criteria to show a list of matched users. Or search with no criteria to show all active users for your group.

Search Results

A user profile can be viewed/changed by selecting the user.

User Details

To update a user profile, please select the relevant function.

Changes made to a user profile will send a confirmation email with their administrator's contact details.

Update Status

+ **Active**
  The user has access to the portal and its ancillary applications

+ **Suspended**
  Access to the portal has been voluntarily revoked* by an administrator (Central or Local) through the Administration Zone. This function can be used for members of staff on extended leave of absence for example

+ **Locked**
  The user has had their access revoked systemically, due to a potential security breach. The user may have made too many attempts to enter their password or memorable question

To change the status of a profile, select the desired setting from the dropdown menu.
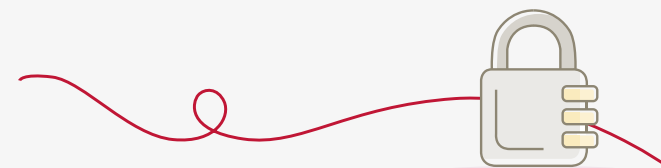
* Reset password is not available through Unipass

Contact us

If you require further information or assistance regarding registration, please do not hesitate to contact us

By email
adviserconnect@canadalife.co.uk

By phone
0345 606 0708
Lines are open Monday to Friday from 9am to 5pm

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