



## **Online Service**

User Guide for  
Independent Financial  
Advisors

**DENTISTS'  
PROVIDENT**



## What you can do

Our online service has been designed to support you through the sales and servicing process. We're committed to helping you use the internet to process your business quickly and efficiently.

Here are some of the things you can do by using our online service:

- Obtain quotes for additional benefits for new and existing clients;
- Apply for cover on behalf of new clients;
- Apply to increase cover for existing clients;
- Track the progress of pipeline applications and obtain immediate updates on your cases;
- View pipeline commission information;
- View your commission history and statements;
- View the up to date details of all your clients;
- Check the balance of your clients' Bonus Accounts.

## How to register

### Registering for use

In order to register for use, a firm must accept our Online System Access Agreement and complete and sign our IFA Registration Form.

Each firm must also nominate a Principal User who is authorised to set up new users for our online service.

Once the Principal User has requested online registration for a new user, they should normally receive their temporary PIN by post within seven days.

## Activating your account

- ❑ Once you've received your temporary PIN, log on to our website at [www.dentistsprovident.co.uk](http://www.dentistsprovident.co.uk) and click on the 'Activate Account' button;
- ❑ You'll be asked for your username (your e-mail address) and three random digits of your temporary PIN;
- ❑ After you've successfully completed the first part of the activation process, an automatic message will be sent to you via e-mail, containing a unique URL link. Click on the URL link to complete the activation process.

## Logging in for the first time

- ❑ After you've clicked the URL link to complete the activation process, you'll be directed to the login screen;
- ❑ For security reasons, you'll again be asked to enter your username and three random digits of your temporary PIN;
- ❑ On successful login, you'll receive a message confirming that the registration process has been completed successfully and you'll have the opportunity of changing your temporary six digit PIN to a number of your choice. We strongly recommend that you change your PIN.

## Advantages of using the online service

### Quotations

You can save quotations and retrieve them at a later date and proceed seamlessly from a current quotation to make an online application for benefits.

## **Applications**

We use tele-interviews to collate the necessary underwriting information for all our online applications. The combination of online applications with tele-interviews dramatically shortens the application cycle and will help you process your business quickly and efficiently. You can also save your applications and return to them later.

## **Application tracking**

You can obtain detailed and up to date information on the business you've submitted using our 'Application Tracking' tool. You can review the summary of your pipeline portfolio or drill down to obtain a detailed tracking history of any individual pipeline case. You can also view a real time record of any outstanding documents and information we're awaiting in connection with each case.

## **Commission**

You can obtain historic commission statements and review your pipeline commission amounts.

## **Client servicing**

Our search facility allows you to review detailed information about your clients, including benefit levels and the date of the last change in benefits.

## **Document library**

Our Document Library provides PDFs of our Key Features Documents, brochures, sales aids and other associated literature.

## Technical information

### What do I need to access the service?

You'll need:

- A PC connected to the internet;
- Internet Explorer (Version 5 and above) or Mozilla Firefox (Version 2.0 or above); and
- Adobe Acrobat Reader.

### Browser requirements

Most internet browsers will work with our service but, for security reasons, we reserve the right to prevent access at any time either to old or new browsers that might introduce risks (for example, they may no longer be supported by the original provider). If you experience any problems accessing our service, please call our Information Services Department on +44 (0) 20 7400 5700.

### Scheduled maintenance periods

We regularly undertake essential system maintenance and upgrades, which means the online service may not always be available. To minimise any inconvenience, we usually do this between midnight on Friday and 12pm on Sunday (UK time). Exceptionally, we may have to carry out maintenance at other times. Whenever possible, we'll give you advance notification of this on our website.

### Technical & service-related enquiries

For technical assistance, please call our Information Services Department on +44 (0) 20 7400 5700. Our technical team are available from 9.00am to 5.00pm Monday to Friday (except Bank Holidays).

## Dentists' Provident Society Limited

Registered office:  
91-94 Saffron Hill  
London  
England  
EC1N 8QP



Telephone number: **+44 (0) 20 7400 5700**  
We may monitor calls to improve our service.

Fax number: **+44 (0) 20 7400 5701**  
Website: **[www.dentistsprovident.co.uk](http://www.dentistsprovident.co.uk)**

Dentists' Provident is the trading name of Dentists' Provident Society Limited which is incorporated in the United Kingdom under the Friendly Societies Act 1992 (Registration Number 407F) and is authorised and regulated by the Financial Services Authority (Firm Reference Number 110015)