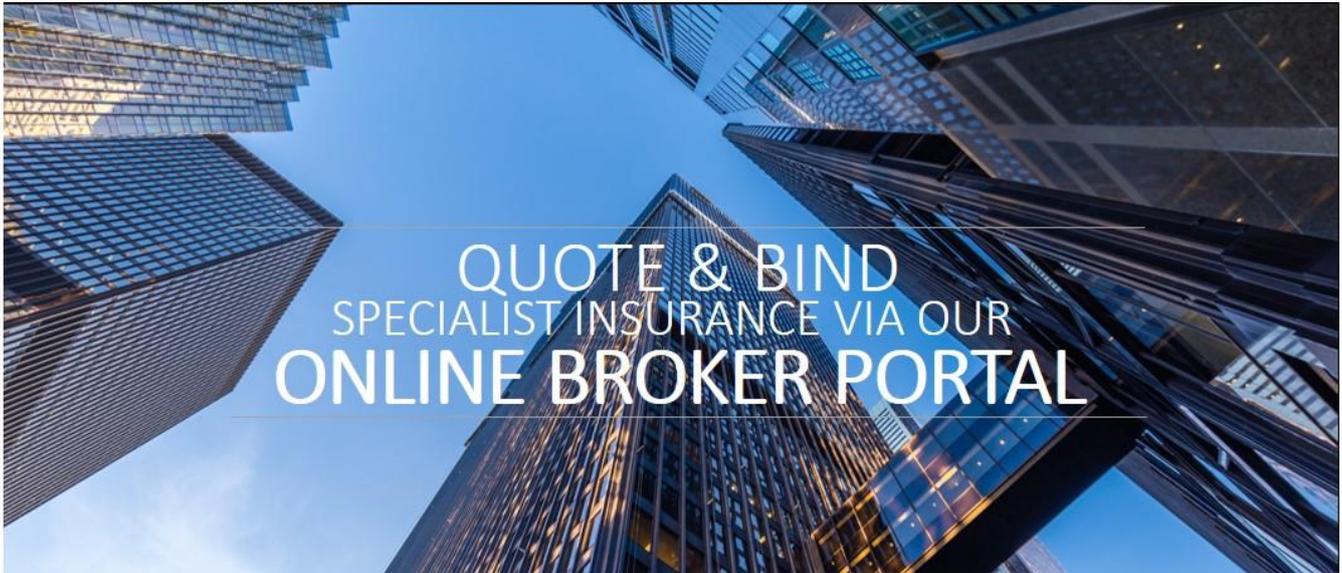


FAQS



LOGIN & PASSWORD

How do I request access to the Broker Portal?

If your brokerage has not signed a Terms of Business Agreement with us, you will need to complete an [agency registration form](#) first.

If your brokerage has a signed Terms of Business Agreement then you need to complete and submit our [online form](#).

If there is more than one person who requires access in your brokerage, please email portal.help@t-u-l.co.uk the list of names and email addresses as well as the Agency ID and address of your branch.

What is my login ID?

Your username is your first name and surname with no space in-between and all lowercase (e.g. joebloggs). When your account is created you will receive an activation email confirming your login details.

I have forgot my password. How do I obtain access?

You can reset it from the log in screen by clicking the '[forgotten password](#)' link. Enter your username and email address when prompted and click 'submit' to confirm your request. A link to reset your password will be emailed to you.

How can I change my password?

[Log in](#) to the Broker Portal and click 'help'. You will then see an option to change password. Enter the new password details when prompted and click 'submit' to confirm your change.

Passwords should be a minimum of seven characters and should include lowercase, uppercase and numeric.

My account is not active or locked? How do I obtain access?

Your account may have been deactivated for a number of reasons. Should this be the case please email portal.help@t-u-l.co.uk with a screen shot if applicable.

PRODUCTS

How do I know what products my brokerage have access to?

Our [Products page](#) on our TUL website will indicate which products are available via the Broker Portal.

When you access a client record and go to add a new policy, it will list the Products available to you. It may be that not all products are made available to all brokers.

POLICY

I need to make changes to a policy mid-term. How do I process an amendment?

Click the 'contact UW' and put the MTA details to us fully in writing. We will then undertake the MTA change and post the documents online ready for you to collect.

How do I cancel a policy?

Please contact an Underwriter either by clicking the 'Refer to UW' button on the portal and advising full details of the cancellation etc. or contact your Underwriter directly via Email.

How will I receive my terms?

You will receive terms by email enclosing the relevant documents in PDF format. Alternatively you may collect the documents from the Broker Portal by searching for the policy record and then going to the 'Documents Section'.

Am I able to manage all my brokerages policies online?

Unfortunately not, although we are working upon adding all of our products to the broker portal.

FAQS

CLIENTS

Who sees my clients on the Broker Portal?

All users logged against your brokerage will have access to the client list.

QUOTES

How long do quotes remain live on the system?

Quotes are valid for 30 days. After this time you would have to revalidate the quotation.

I need to provide alternative quote for amended cover in addition to the generated Renewal terms. How do I do this?

Amend the renewal schedule and you will either be requested or referred to an underwriter, if it's a simple change.

Should it be more than a simple alternative quote please, contact our office. We will create you an alternative record to which to put the alternative quote changes against

I need to make changes but have already accepted cover. Can you amend this post acceptance and provide me with an amended schedule?

No, cover basis has already been accepted by you. You will need to complete an MTA request.

INVOICING

Who do I contact with regards to invoicing queries?

Please contact our Accounts Team on 01245 204 568 or email TUL_Accounts@t-u-l.co.uk

RENEWALS

How far in advance will I receive renewal terms?

Renewal terms are generally available up to 30 days in advance. Where we are awaiting proposal forms or specific details from you then renewal terms shall not be available until we have received the information requested.

CLAIMS

How do I make a claim?

Please contact our Claims Team on 01923 298 431 or email TUL_Claims@t-u-l.co.uk.

From 2019, you may review current positions on claims for your clients.

OTHER

What will you do with mine and my client's personal information?

Please read our [Terms of Business](#) to learn more.

How do I report errors found on the Broker Portal?

Please email portal.help@t-u-l.co.uk and include a screenshot if applicable.

I need technical help. Who do I contact?

Please contact the team on 01923 298 440 or email portal.help@t-u-l.co.uk for assistance.

How long will my session last?

The Portal will automatically log you out of the system after 20 minutes if you are idle.

A member of staff has left our brokerage. How do we remove or transfer their online account?

Please email the relevant details to portal.help@t-u-l.co.uk and we can either remove the account or transfer to another colleague.

QUICK LINKS

[Login here.](#)

HOW TO GUIDES:

- > [Intro to Broker Portal](#)
- > [Adding ERN details](#)

TECHNICAL

- > [Encryption Protocols](#)