



For
adviser
use only

Our SIPP Options UK

Agency Admin Function
Online Application

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ONLINE AREA

You can log into your online account via the Adviser Area on the Options UK website: <https://www.optionspensions.co.uk/online-area>. Follow the path: **SIPP > Online Area** and click on the Adviser Area.

The screenshot shows the Options UK website's 'Online Area' page. The URL is [optionspensions.co.uk/online-area](https://www.optionspensions.co.uk/online-area). The page features the Options UK logo and the STM Group PLC logo. A navigation menu includes links for 'ABOUT US', 'SIPP', 'SHARIA SIPP', 'SSAS', 'PROPERTY', 'WORKPLACE PENSIONS', 'TRUSTEES', 'NEWS', and 'DOCUMENTS & RESOURCES'. A secondary menu includes 'CONTACT US', 'PERSONAL PENSION - INDIVIDUAL SIPP', and '& SCAMS'. The main content area is titled 'Online Area' and includes a 'Welcome to the Online Area' message. It provides instructions for advisers and clients, with three links: 'Adviser Registration', 'Adviser Area' (circled in red), and 'Client Area'.

- Once logged in you will see your permitted functions.
- If you are both a Business Writer & Agency Administrator, you would have additional tabs available for the below:
 - Illustrations
 - Pipeline Tracker
 - Clients

The screenshot shows the 'Adviser Area' page. The title is 'Adviser Area'. The main content area contains a welcome message: 'Welcome to your dedicated Adviser Area. From here you will be able to access and manage your clients' policies and illustrations, as well as carrying out any necessary maintenance in relation to your Agency details.' On the right side, there are four buttons: 'Illustrations', 'Pipeline Tracker', 'Clients', and 'Your Account'.

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AGENCY MAINTENANCE

Invite new Users

Approve new User requests

View existing Users for your agency

Remove/suspend User accounts

Access your Agency Agreement with Options UK

Agency Maintenance

Welcome to the 'Agency Maintenance' area of our website.

As an authorised Administrator, you will have the option to invite potential new users to join your Agency and authorise them to write new business on your behalf.

Using the navigation panel on the right, you can simply invite them to join your Agency by clicking on the 'Invite Business Writer' button, and following the instructions.

Occasionally it is possible that a potential new user may attempt to join your Agency before they have been authorised to do so, and in the event that this happens an automatically generated email will be sent to notify you.

Upon receipt of this email simply click on the 'Existing Business Writers' tab located on the right hand side of this page, and the applicant's details and status will be displayed. You will then be given the option to either approve or delete the request.

Should you require any further assistance with regards to any of the features contained within this section, or any other part of our website, please contact us.

> Agency Maintenance

> Agency Agreement

> Invite Users

> Existing Users

> Your Account

ADDING USERS

This section allows you to add anybody that holds an advisory capacity within your organisation, in order for them to have access to our Options UK products & services, and to utilise the online application.

Only the Agency Administrator can add Business Writers, and by adding them to your agency, you are agreeing to accept regulatory responsibility for that individual and/or firm.

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ADDING USERS

Invite Users

Enter the email address of the person you wish to invite as a user in the box below, select the role(s) they will perform, and then invite them.

We will then email them out an invitation to become a user, and their details will appear within the "Existing Users" section.

Email Address *

User Roles *

Business Writer
User who is suitably authorised to submit business

Paraplanner
User who can help a business writer complete product applications

- > Agency Maintenance
- > Agency Agreement
- > **Invite Users**
- > Existing Users
- > Your Account

Simply select which function your new User will be performing and add in their email address.

For Paraplanner access, please contact customerrelations@optionspensions.co.uk and specify which Business Writer the Paraplanner will need to be assigned to.

EXISTING USERS

Here you can view your previously invited or approved Users.

You can also suspend an account if someone leaves the firm.

Existing Users

Existing Users			
Name	Email	Account Status	Account Actions
Mr Test Case	testadmin@test.com	✓ Roles	
Mr Test Case	testbusinesswriter@test.com	✓ Roles	

- > Agency Maintenance
- > Agency Agreement
- > Invite Users
- > **Existing Users**
- > Your Account



FOR MORE INFORMATION PLEASE CONTACT

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