Unipass
Transfer Tracking

By ORIGO

The ultimate guide to transfer tracking

About Unipass Transfer Tracking

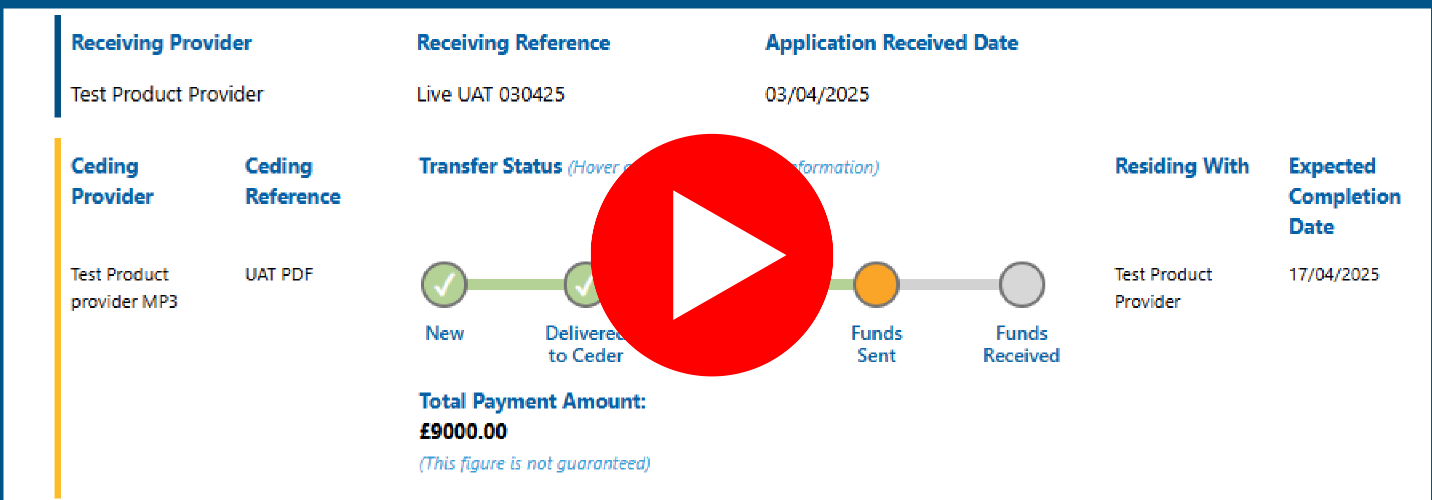
Our new Beta service, Unipass Transfer Tracking (UTT) enables advisers to conduct a real-time search on the status of pension cash and annuities transfers being processed through the Origo Transfer Service.

Through launching as a Beta service we are able to continuously monitor and use adviser feedback to implement improvements that best meet the needs of advisers and their customers.

UTT is available to all advisers with a Unipass Identity and can be easily accessed after logging into the Unipass website and heading to the ['My Account' page.]()

How does it work?

- Once you have authenticated with your Unipass Identity, you will be taken to the new My Account page.
- Select the Unipass Transfer Tracking tile to be taken to the service.
- Once you have entered Unipass Transfer Tracking, you will be able to conduct a search for a single client or transfer by entering the three mandatory fields. 1) The ceding (existing) or receiving provider's reference. 2) Client's Surname. 3) Client's Date of Birth.
- The service will conduct a search on the Origo Transfer Service to find a match.



Frequently Asked Questions

Q: How do I access Unipass Transfer Tracking

A: Unipass Transfer Tracking is available through the Unipass website. Simply login with your existing Unipass Identity via the My Account link at the top of the page and select the Unipass Transfer Tracking tile.
If you are not yet registered with Unipass, complete our online registration form, using the 'I want to use Unipass Identity' link on our homepage. Once registered and authorised, you will have access to Unipass Transfer Tracking as well as any of our other Unipass services.

Q: Which products are covered?

A: Currently, our Unipass Transfer Tracking service covers all Pension Cash and Annuity transfers that are completed through the Origo Transfer Service.

Q: Can’t find your clients’ transfers?

A: If you are unable to find your clients transfers, we would recommend getting in touch with the receiving provider to check that the transfer is proceeding through the Origo Transfer Service and confirm that they are using the same reference that you have for your clients transfer.

Q: How much does it cost?

A: This service is completely free for advisers.

Q: What is your clients’ receiving or ceding provider reference?

A: This is the reference number that your clients' providers are using on the Origo Transfer Service. This is normally your clients’ plan or policy number.

Adviser Feedback

“This was so quick and easy to use, easy to navigate and information displayed clearly. I tried it on a couple of clients straight away and had my team trained up within half an hour of receiving your email.”

“It's potentially revolutionary! “

“In years to come we will look back and laugh how this wasn't in place before.”

“Love this!! makes everything easy and all in one place.”

A massive welcome improvement that is going to save me 100’s of hours of time saved - as it will drastically reduce the amount of time spent on the phone chasing providers.”

Unipass Transfer Tracking has been designed to solve an industry pain point faced by advisers. The service takes away the need to call providers for the status of a transfer, and replaces this with an efficient, digital workflow, requiring minimal effort from advisers. Thanks to our service, transfer tracking can now be completed in seconds.

Get in touch

Find out more about UTT