

# LifeQuote

## Frequently Asked Questions Case Tracking



## Finding Cases

### **Q. Where do I find my cases?**

Once you have logged in there are two ways to find your cases.

1. On the left hand side there is a “Filter” section and three search boxes – Name, Postcode or Case Number. Enter your client information in any or all of these boxes and click “Search”. Your results will appear on the right hand side.
2. On the right hand side of the home page you will see a “Summary Page” with four coloured categories (detailed below). If you already know the status of the application you can click on the relevant section to find the case.

### **“Applications in Progress”**

**PRE-SUBMISSION** – This shows all your cases that have not been submitted to the insurer yet and are waiting a tele-underwriting call or further information from the client or you, the adviser.

**PIPELINE** – This shows all your cases that are being progressed by your Case Manager who is gathering all outstanding information required by the insurer.

### **“Awaiting Start Date”**

**READY TO START** – This shows all your cases that have been accepted and are awaiting a start date.

### **“Applications at Risk”**

**AT RISK OF CANCELLATION** – This shows all your cases that are at risk of lapsing as the premium has bounced or the client has cancelled the direct debit mandate and therefore may result in a clawback.

### **“Completed Applications”**

**COMPLETED** – This shows all your cases that have been placed on risk and are live.

**NOT PROCEEDED WITH/DECLINED** – This shows all your cases that were abandoned, lapsed, declined, postponed or cancelled from inception.

### **Q. I am the Master User, where can I view all my individual Adviser’s cases?**

Once you have logged in under your Master login you will need to select a status option from the Summary Page. When the case list comes up move the scroll bar to the right to find the “Agent Number” option, you can then filter by each adviser.

## Case Details

There are multiple tabs within the case details page which contain your case information.

### **Q. Where can I see all the action that has been taken on my case?**

Once you have chosen your case you will need to select the “History Notes” tab underneath Case Details.

This details all the progress that has happened on the case so far. It will provide information on the tele-underwriting and submission information followed by every action your Case Manager has

taken so far. It will show every phone call, email, text or letter that has been sent or received along with brief notes in regards to the discussion had in any phone call.

**Q. Where do I find what information is outstanding for my case?**

Included in the “History Notes” tab there is a sub heading “Outstanding”.

This details the outstanding information that your Case Manager is working on. This could include when the application or terms are due to expire, each piece of missing information, an outstanding start date or that an underwriting decision is awaited from the insurer.

**Q. Where can I see when my case will next be chased?**

Next to the outstanding requirements in the “History Notes” tab you will see a heading “Next Action” and underneath will show the date your Case Manager is next due to chase.

**Q. My case hasn’t been looked at yet, when will it be?**

Your Case Manager must prioritise all acceptance terms and risk instructions before anything else and then they start working on diarised chases on your cases. So, if you can see from the tracking that they are due to chase a case that day, they will be doing so, therefore there is no need for you to contact them.

They must also answer their incoming calls as they come in along with any emails received from clients and yourselves. Therefore, if they are receiving chaser emails and calls for cases due to be chased that day, it will take longer for them to get to their chases as they are having to stop to answer the phone and email queries.

At times there may be occasions when we get peaks in our workflow as can happen in any business. For example, your Case Manager may have received an influx of acceptance terms, had lots of incoming calls on a particular day or we may have had a day of low resource and this may mean that on occasion, we haven’t got to your case on the day it is due.

If this happens, the following day, your Case Manager will prioritise clearing up the previous day’s chases before getting on with the next day’s work (apart from risks and acceptance terms) so although a rare occurrence, if this happens we will take steps to get back on track as soon as possible.

**Q. What is a Key Milestone?**

Under the “History Notes” tab you will see an option to “View Key Milestones”. If you click on this, it will show you a brief history of what is/was required and whether it has been returned or not as yet without all the details of the chases that have been made.

**Q. Where can I download the documents for a case?**

They are located in the “Document’s” tab in Case Details. You will see the documents available for you to open and print or download.

**Q. Why are some documents not there?**

If you feel you are missing a document that should be there, please email or phone your Case Manager who will be able to help you.

**Q. Where do I find the policy details for my case?**

When you're in your chosen case you will see a heading "Case Detail". Underneath if you click on "Application" you will see all the policy information.

**Q. Where do I find the client details for my case?**

When you're in your chosen case you will see a heading "Case Detail". Underneath if you click on "Client Details" you will see all the client information.

## **Commission**

**Q. How do I find out about commission?**

When you're in your chosen case you will see a heading "Case Detail". Underneath are multiple tabs. Click on "Commission" and this will show you the current Commission Status which is either, Policy not on risk, Awaiting commission from provider, Commission received by LifeQuote or Commission Paid to Adviser.

When the Policy has been placed on risk and we have received commission here you will see the date we received the commission. Our standard commission payments are sent on the 14<sup>th</sup> and 28<sup>th</sup> of each month, or on the previous banking day when these dates fall on weekends or bank holidays. Once commission has been received by LifeQuote this will be included in the next available commission run.

When we have paid your commission you will see the amount paid and the date on which the commission was paid. Please note; if you work on a fee basis, your commission details will not be available.

## **Other Information**

**Q. Where can I find my client contact preferences?**

On the left hand side of the screen you will see "Contact Preference". If you have chosen a specific way that you want your Case Manager to take care of your clients it will be shown here along with an explanation of all the options.

**Q. How do I contact LifeQuote?**

If you regularly have email or phone contact with your Case Manager then you will know how to get in contact with them but if not, you will see on the left hand side of the screen an option to "Email LifeQuote". If you select this option it will open an email to [casemanagers@lifequote.co.uk](mailto:casemanagers@lifequote.co.uk). This will be sent to a managed inbox and forwarded onto to the correct person.

The Case Managers work 8:00am-5:30pm Monday to Friday.