

# LifeQuote

## LifeQuote Case Tracking User Guide



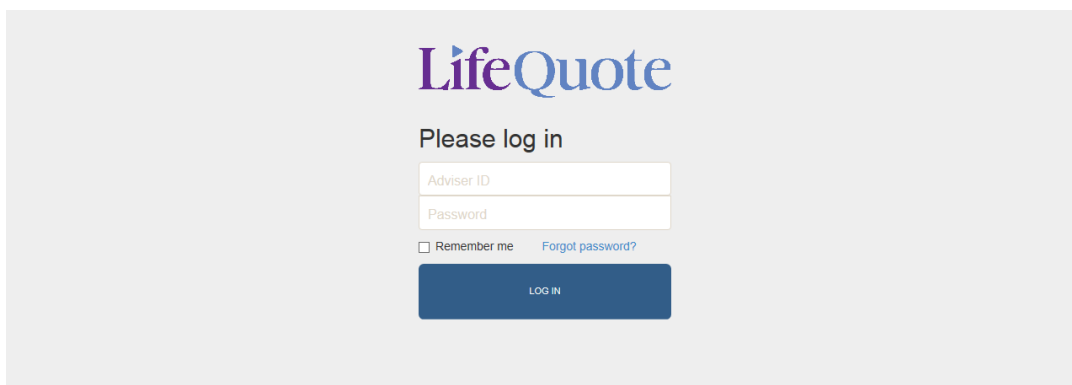
LifeQuote's case tracking system is designed to make it simpler for advisers to obtain on the spot updates on their cases and download any important documents like a copy of the online application.

It is a real time system so will be updated as soon as an action has been taken by your LifeQuote Case Manager.

## **Logging in**

To log in to your case tracking you will need to use the same login details as for the quoting portal. If you are unsure of these please contact your Case Manager or call the Adviser Support Team on 01243 791199.

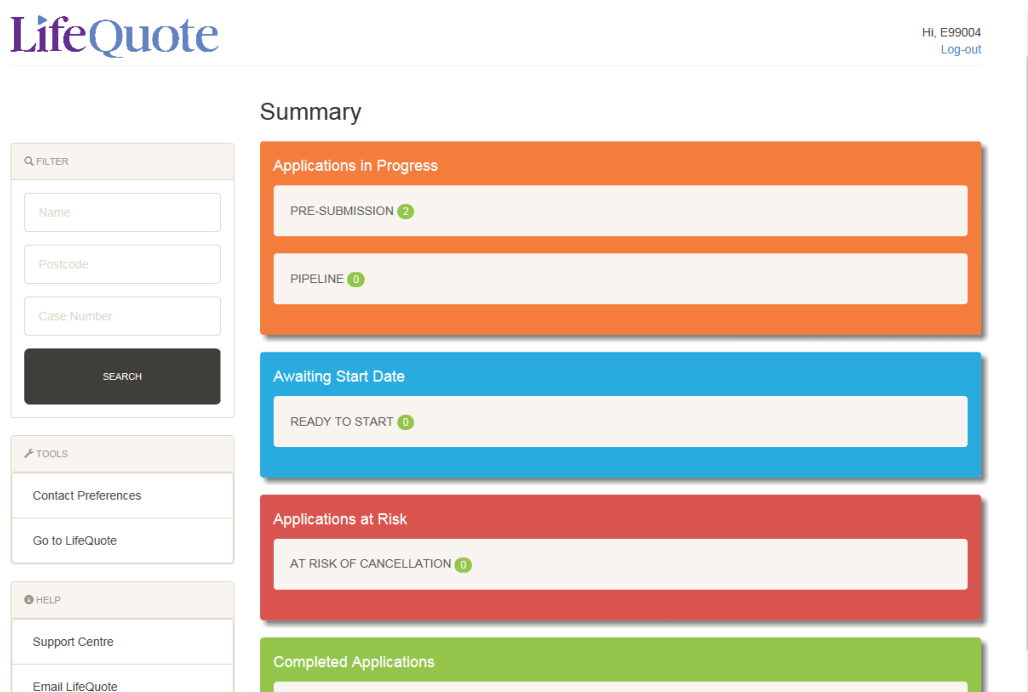
URL: [www.lifequote.co.uk/casetracking](http://www.lifequote.co.uk/casetracking)



The image shows the LifeQuote login interface. At the top center is the LifeQuote logo. Below it, the text "Please log in" is displayed. There are two input fields: "Adviser ID" and "Password". Below these fields are two links: "Remember me" (with a checkbox) and "Forgot password?". At the bottom is a blue "LOG IN" button.

## **Summary Screen**

Once you have logged into the system you will be taken to the Summary Screen. This is the home page of your tracking system where you will be able to quickly see the status of your applications and search for more detailed information.



The image shows the LifeQuote Summary Screen. At the top left is the LifeQuote logo. At the top right, it says "Hi, E99004" and "Log-out". Below the logo is a "Summary" heading. On the left side, there is a "FILTER" section with input fields for "Name", "Postcode", and "Case Number", and a "SEARCH" button. Below the filter section is a "TOOLS" section with links for "Contact Preferences" and "Go to LifeQuote". Below the tools section is a "HELP" section with links for "Support Centre" and "Email LifeQuote". The main content area on the right is divided into four colored boxes: "Applications in Progress" (orange), "Awaiting Start Date" (blue), "Applications at Risk" (red), and "Completed Applications" (green). Each box contains a summary of applications in that status, with counts in green circles. For example, "Applications in Progress" shows "PRE-SUBMISSION 2" and "PIPELINE 0".

On the left hand side of the page you will see the option for “Filter”, “Tools” and “Help”.

The “**Filter**” option allows you to search more specifically for your clients using their name, postcode or case reference number. You can enter any or all of these options to find the results.



Q FILTER

Name

Postcode

Case Number

SEARCH

“**Tools**” - allows you to see your contact preferences with LifeQuote and provides a link back to the LifeQuote Portal.

When you first submit a case to LifeQuote your Case Manager will contact you to discuss contact preferences for your clients. Confirmation of these along with a detailed explanation of the options can be found under “Contact Preferences”. For more information contact your Case Manager.



Hi, E99004  
[Log-out](#)

## Contact Preferences

TOOLS

Home

Contact Preferences

Go to LifeQuote

HELP

Support Centre

Email LifeQuote

Your current contact preferences are detailed below along with an explanation for each. If you need to change your preferences please contact LifeQuote using the [link](#) in the Help section of this screen.

**Client contact** : Never

**Terms and start dates** : Only on Standard Terms

[Client Contact](#)

There are 3 options you can choose as to how you would like us to manage contact with your clients prior to Acceptance Terms which are managed differently (see below).

1. **Standard Process**

We will contact your client by either phone, email, text or letter to gather all required information.

2. **Not by Phone**

We will only contact your client by email, text or letter and not phone them.

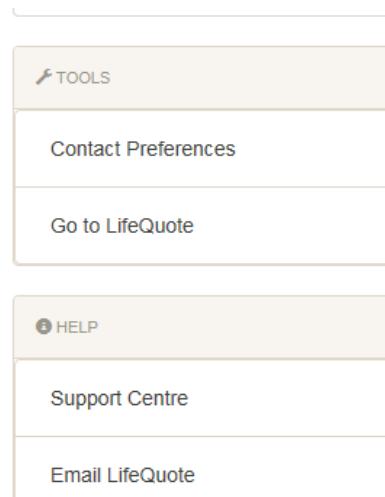
3. **Never**

We will never contact your client directly.

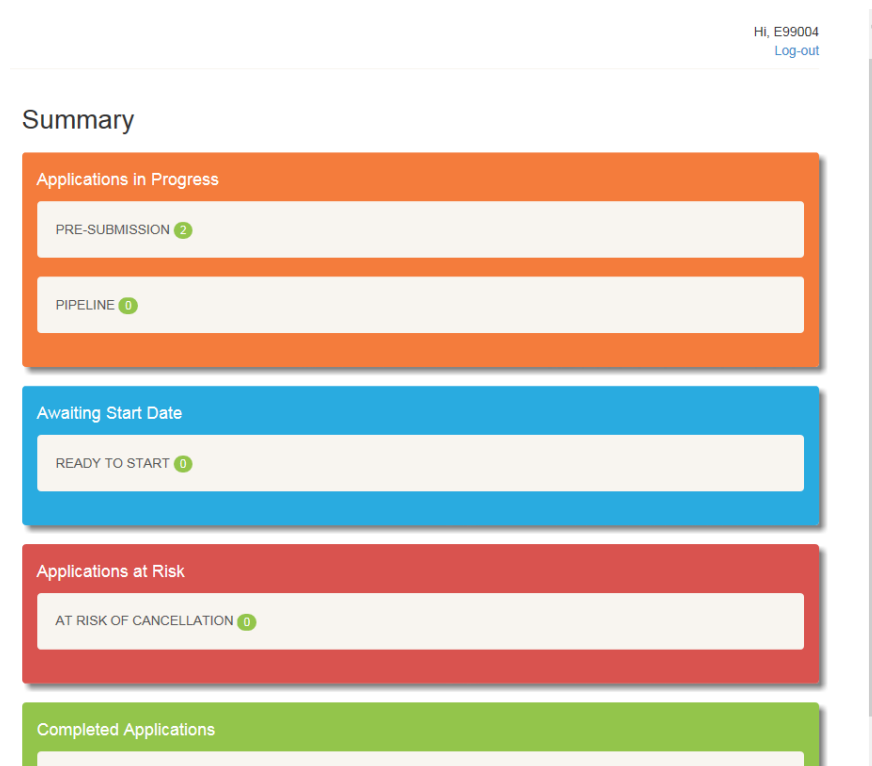
[Acceptance Terms and Start Dates](#)

There are 3 options you can choose as to how you would like us to deal with acceptance terms and start dates. These include:

The “**Help**” section provides a Support Centre for FAQ’s, user guides and more information about the case tracking. If you have further questions about your cases please contact your Case Manager directly, if you are unsure who this is then you can use the “Email LifeQuote” option and they will contact you.



On the right hand side of the Summary Page you will see some coloured sections. These reflect the status of each of your cases. If you know whether your cases are awaiting a telephone call, are undergoing underwriting or are outstanding a start date you can select the appropriate status and see all of your cases in a list.



Finding client records

You have two ways to search for client records, if you know the status of the application you can select this or you can enter details in to the “Filter” section.

Once the results have come up they will show in a list as below:

LifeQuote

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[Log-out](#)

Case List

TOOLS

Home

Contact Preferences

Go to LifeQuote

Client Name	Case Number	Provider	Policy Type	Sum Assured	Term	Premium	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Miss E White and Miss L Findlay	472160	Friends Provident	Level Term & WOP	120000	35	7.89	PO7 8LF
Mr T and Mrs T Ttest	1393472	Legal & General	Multi-Benefit Plan	1000	25	53.73	PO19 1HA

If you can see the client then you can click on their line to open up the case details. Alternatively you are able to filter these results further by Client Name, Case Number, Provider, Policy Type, Sum Assured, Term, Premium and Postcode.

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Case List

TOOLS

Home

Contact Preferences

Go to LifeQuote

Client Name	Case Number	Provider	Policy Type	Sum Assured	Term	Premium	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Miss E White and Miss L Findlay	472160	Friends Provident	Level Term & WOP	120000	35	7.89	PO7 8LF
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LifeQuote

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Case List

TOOLS

Home

Contact Preferences

Go to LifeQuote

Client Name	Case Number	Provider	Policy Type	Sum Assured	Term	Premium	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Miss E White and Miss L Findlay	472160	Friends Provident	Level Term & WOP	120000	35	7.89	PO7 8LF
Mr T and Mrs T Ttest	1393472	Legal & General	Multi-Benefit Plan	1000	25	53.73	PO19 1HA

## Case Details

Once you have found your selected client you have a series of tabs for more information. For updates on your cases see the “**History**” tab and for important documents select “**Documents**”.

### History

The history tab provides you with all the case notes and actions from the submissions teams and your Case Manager.

Outstanding – this shows what your Case Manager is chasing and when the next action will take place. This could include when the application or terms are due to expire, each piece of missing information, that a start date is required or that an underwriting decision is awaited from the insurer.

***Please note** – Your Case Manager must prioritise all acceptance terms and risk instructions before they start working on diarised chases. They must also answer their incoming calls along with any emails received from you. At times there may be occasions when we get peaks in our workflow, for example an influx in acceptance terms, which could mean we won’t get to your case on the day it’s due.*

*If this happens your Case Manager, on the following day, will prioritise clearing the previous days chases before moving on to that day’s work (apart from acceptance terms and risk dates.) So, although this is a rare occurrence we will take steps to get back on track as quickly as possible.*

*If they receive chaser emails or calls for cases that are to be chased that day it may take longer for them to get to those cases but please rest assured we will chase them as soon as possible.*

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[Log-out](#)

### Case Detail

TOOLS

Home

Contact Preferences

Go to LifeQuote

HISTORY NOTES

DOCUMENTS

APPLICATION

CLIENT DETAILS

COMMISSION

#### Outstanding

Item	Next Action
New Proposal - Awaiting Call to Client	27/02/2017
FT - - Legal & General	23/02/2017

History – This is the full history notes for your application. It will show every phone call, email or text that has been sent or received along with brief notes in regards to the discussion in any phone call. For more information select the “More” option.

[View Key Milestones](#) – For a brief overview of the key milestones in the application you can select this button. You will then be able to see when important information was requested and received.

HELP		
Support Centre		
Email LifeQuote		

History

VIEW KEY MILESTONES

Action Date	Format	Details
23/02/2017	Note	***** Fast Track ***** <a href="#">More</a>
23/02/2017	Note	Multi-Quote Details <a href="#">More</a>
23/02/2017	Note	Quote Details <a href="#">More</a>

## Documents

The documents tab gives you access to the documents associated with the application. The main ones which will be available are the Quote, Key Features, Online Application and Terms once available.

Any other documents such as consent forms, client questionnaires or direct debit mandates will also be available to download.

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[Log-out](#)

Case Detail	
TOOLS	HISTORY NOTES
	DOCUMENTS
	APPLICATION
	CLIENT DETAILS
Home	COMMISSION
	KFD
	Quote
	Underwriting Disclosures
Contact Preferences	
Go to LifeQuote	

HELP

Support Centre

Email LifeQuote



## Application

On this tab you have access to the application details such as the case number, name of your Case Manager along with the sum assured, term and provider you selected.

In the right hand column you can also see whether you or your clients selected immediate risk once accepted, what the final premium is, date it started and whether a trust was requested.

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### Case Detail

TOOLS	HISTORY NOTES	DOCUMENTS	APPLICATION	CLIENT DETAILS	COMMISSION
Home	<b>Case Number :</b> 1393472				
Contact Preferences	<b>Policy Number :</b>				
Go to LifeQuote	<b>Status :</b> New Proposal				
	<b>Administrator :</b> James Aslett				
	<b>Agency Company :</b> DEMO IFA				
	<b>Adviser ID :</b> 99004				
	<b>Partners Reference :</b>				
	<b>Provider :</b> Legal & General				
	<b>Policy Type :</b> Multi-Benefit Plan				
	<b>Lives Assured :</b> Joint Life (1st Death)				
	<b>Sum Assured :</b> £1000.00				
	<b>CIC Sum Assured :</b> £				
	<b>Premium Basis :</b> Guaranteed				
	<b>Term :</b> 25				
	<b>Proposal Received :</b> 23/02/2017				
	<b>Proposal Submitted to Provider :</b>				
	<b>Immediate Risk Required :</b> Yes				
	<b>Risk Date Requested :</b>				
	<b>Date Accepted :</b>				
	<b>Quoted Premium :</b> £53.73				
	<b>Premium Offered :</b> £				
	<b>Actual Risk Date :</b>				
	<b>Trust Requested :</b> No				

## Client Details

This tab provides you with the client information you submitted to us e.g. name, address and telephone numbers.

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Hi, E99004  
[Log-out](#)

### Case Detail

TOOLS	HISTORY NOTES	DOCUMENTS	APPLICATION	CLIENT DETAILS	COMMISSION
Home	<b>Mr T and Mrs T Ttest</b>				
Contact Preferences	<b>Ernest Jones</b> 93 East Street Chichester West Sussex PO19 1HA				
Go to LifeQuote	<b>App1 Evening No :</b>				
	<b>App2 Evening No :</b>				
	<b>App1 Daytime No :</b> 07999999				
	<b>App2 Daytime No :</b> 07999999				
	<b>App1 Mobile :</b>				
	<b>App2 Mobile :</b>				
	<b>Applicant 1</b>				
	<b>Sex :</b> Male				
	<b>DOB :</b> 02/02/1980				
	<b>Applicant 2</b>				
	<b>Sex :</b> Female				
	<b>DOB :</b> 01/01/1983				
	<b>App1 Email :</b>				
	<b>App2 Email :</b>				



## Commission

Our standard commission payments are sent on the 14<sup>th</sup> and 28<sup>th</sup> of the 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.

*Please note* – For advisers using LifeQuote on a fee basis the commission information may not be available.

In this tab you will be able to get an update on the status of your commission. You will see one of the following options:

- Policy not on risk
- Awaiting commission from Provider
- Commission received by LifeQuote
- Commission paid to Adviser

Once LifeQuote has received the commission payment and paid it onto yourself/the firm, a new line will appear to notify you on this date.



Hi, E99004  
[Log-out](#)

### Case Detail

<b>TOOLS</b>	HISTORY NOTES	DOCUMENTS	APPLICATION	CLIENT DETAILS	COMMISSION
Home	<b>Status :</b> Policy not on risk  Our standard commission payments are sent on the 14th and 28th 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				
Contact Preferences					
Go to LifeQuote					

For more information on how the LifeQuote Case Tracking works please visit the Support Centre [www.lifequote.co.uk/home/support-centre/](http://www.lifequote.co.uk/home/support-centre/)