

LifeQuote Status Guide

At LifeQuote we provide a range of statuses to help you understand where in the process your client's application is. These start prior to completion of the application and continue through to the policy starting and commission being paid.

Abandoned

The application has been closed down. This could be due to the application expiring or a request from the client or adviser.

CFI

Cancelled From Inception – The policy has been cancelled within 30 days of the start date. This is likely to be within the 'cooling off' period for the client which would result in any premiums paid being refunded.

Current

The medical and lifestyle application has been completed, submitted to the insurer and is now in underwriting. This could be with the insurer to assess or there could be outstanding requirements such as GP Reports or Medical Examinations. These applications will appear in the "Pipeline" section of Case Tracking.

Declined

The application has been declined by the insurer due to medical or lifestyle reasons.

EU Unsuccessful

Our submissions teams have not been able to complete the medical and lifestyle application and submit to the insurer. This could be due to the telephone application not being completed due to a missed appointment, unable to schedule an appointment or missing information from the client.

Lapsed

The policy has been cancelled after the 'cooling off' period at the clients request or due to unpaid premiums.

New Proposal

We have received the client's details to complete a Telephone Application or submit the application questions but this has not yet been completed and passed to the insurer. These applications will display in the "Pre-Submission" section of Case Tracking.

On Hold

The client or adviser has requested we place the application on hold.

Policy Sent

The policy has been started with the insurer. This could be straight away or a future start date.

Postponed

The application has been postponed by the insurer for a certain amount of time due to medical or lifestyle disclosures.

Replaced

This application has been replaced by a new one. This would be at the request of the adviser.

Start Date

The insurer has made a decision and the application is waiting for a start date from the adviser or client. These applications will display in the "Ready to Start" section of Case Tracking.

[Click here](#) for more information on how to use Case Tracking or contact your Case Manager.