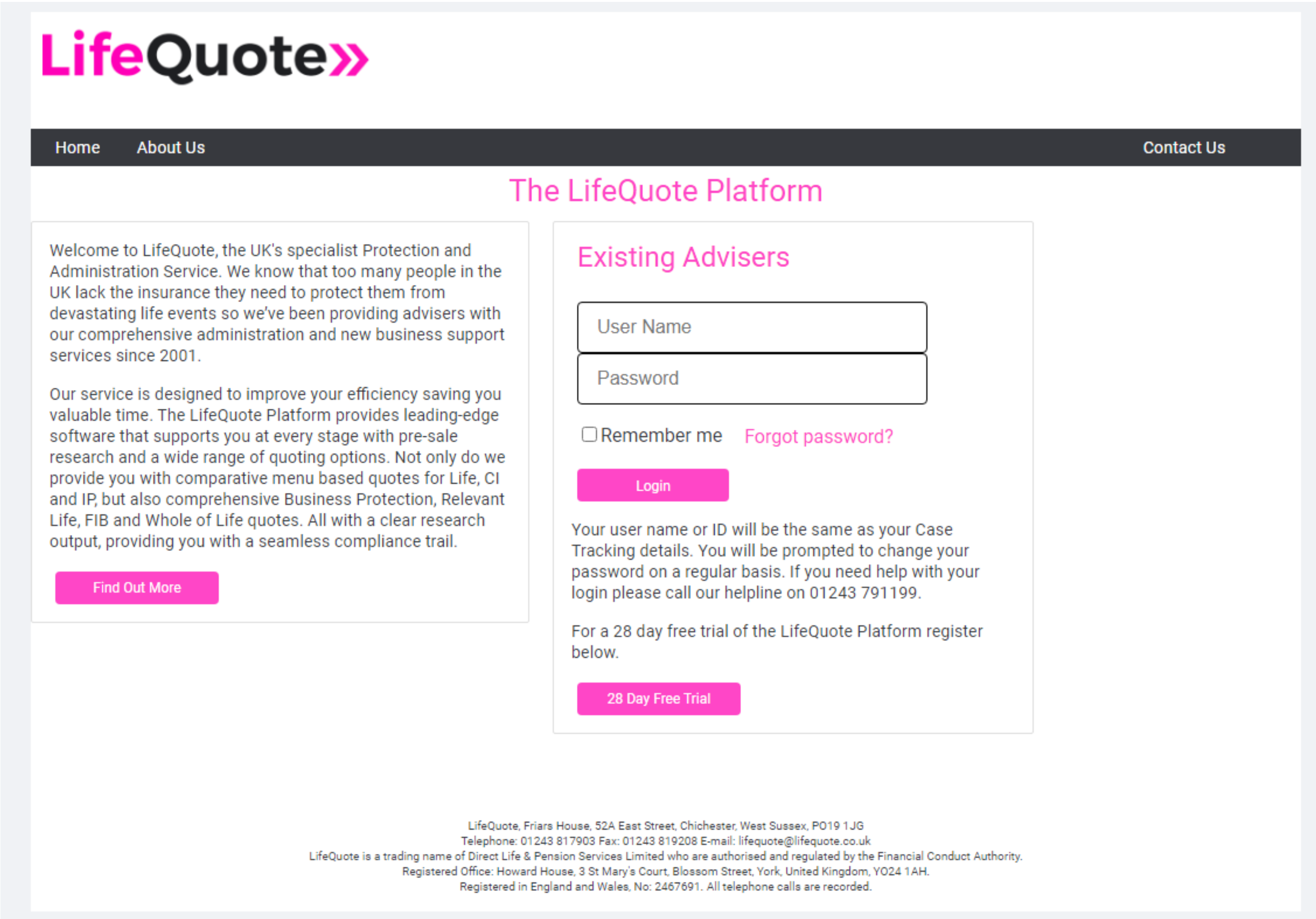
Case Tracking Quick Start Guide

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.

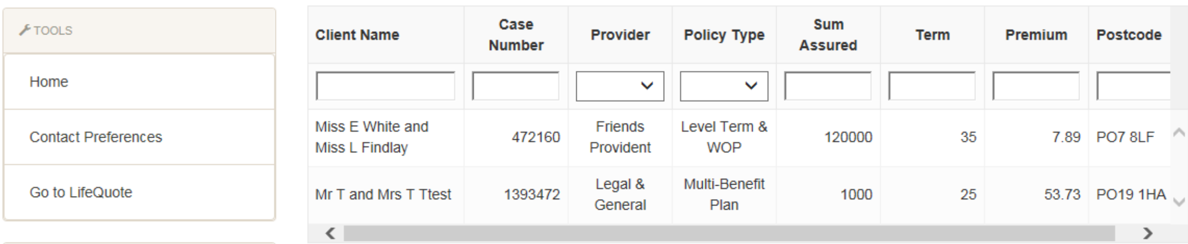
URL: www.lifequote.co.uk/casetracking



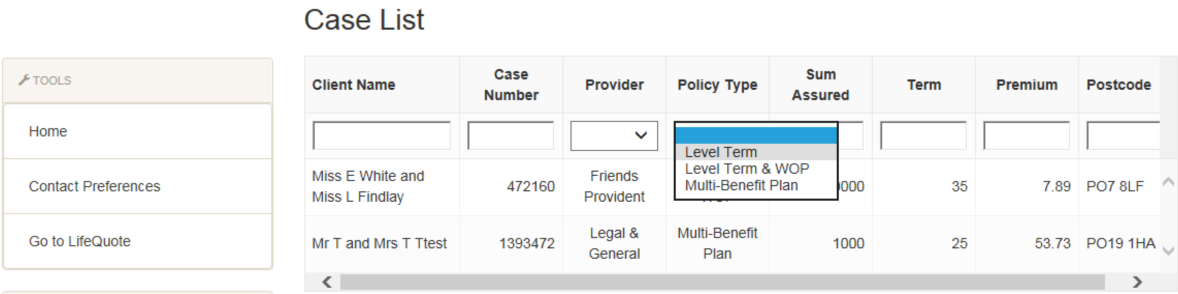
Finding a case

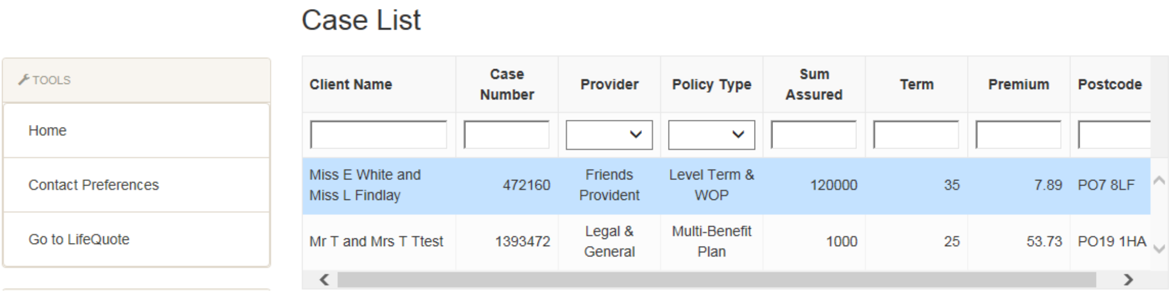
Using the "Filter" section on the left hand side enter the clients name, postcode and/or case reference number.

Once the results have come up you can select the client from the list or use the options at the top to filter further.



Client Name	Case Number	Provider	Policy Type	Sum Assured	Term	Premium	Postcode
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

This will outline all notes made by the submission team and your Case Manager so far. To view important events select “View Key Milestones” which will then show a brief overview of what has been requested and received.

The “Outstanding” section will show what your Case Manager is currently chasing and the next date this is due.

Please note - It is very important your case manager deals with all acceptance terms and risk dates before chasing other requirements.

There could be the odd occasion when your case does not get chased on the date specified for example if we have had an influx of acceptance terms.

Once these keys tasks and any phone calls/emails responded to we will then work hard to catch up with any outstanding chases.

Documents

If you need a copy of the application form, terms or quotation these will be available in the documents section. Once they are available they will appear in this section and you can download them.

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.

Commission

For an update on the status of a commission payment on your case please select the commission tab. You will see one of the following statues which will explain where in the process your commission is:

- 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.

Please note – For Advisers using LifeQuote on a fee basis the commission details map not be available.