

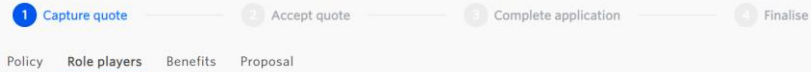
How to screen multiple insured lives



Step 1:
Select the 'Role
players' tab

New business quote

Send screening link for one insured life on the quote

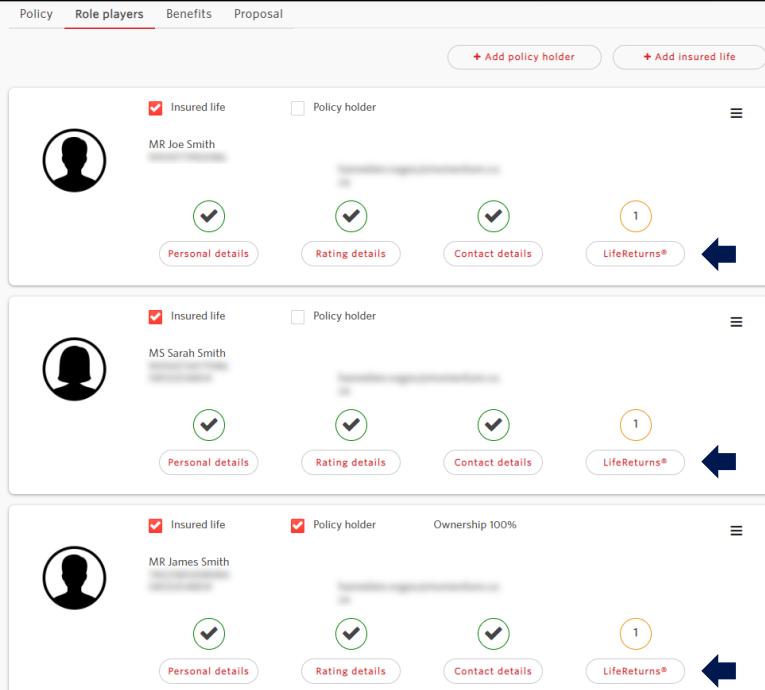


How to screen multiple insured lives

Step 2:

Click on LifeReturns®
on the Insured life card
who should receive the
screening link

Note: ID number, cellphone number and email address of the insured life must be captured before screening



Policy Role players Benefits Proposal

+ Add policy holder + Add insured life

| Insured life | Policy holder |
|--|-------------------------------------|
| <input checked="" type="checkbox"/> MR Joe Smith | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> MS Sarah Smith | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> MR James Smith | <input checked="" type="checkbox"/> |

Ownership 100%

Personal details Rating details Contact details LifeReturns®

How to screen multiple insured lives



Step 3:

Click on 'Send link' to send the screening link to the specific insured life

Policy **Role players** Benefits Proposal

< Role players James Smith (0123456789)

| | |
|-------------------------|---|
| Personal details | ▼ |
| Personal rating details | ▼ |
| Contact details | ▼ |
| LifeReturns® | ▼ |

Valid screening results not available. Click on the 'Send link' button to send a link to the insured life's phone. They should follow the link to complete the screening.

Send link

✕ Remove client Cancel Save and continue

How to screen multiple insured lives



Step 4:

Click on 'Confirm'

Confirm Screening Link?



You are about to send a screening link to the client, are you sure you want to continue?

Cancel

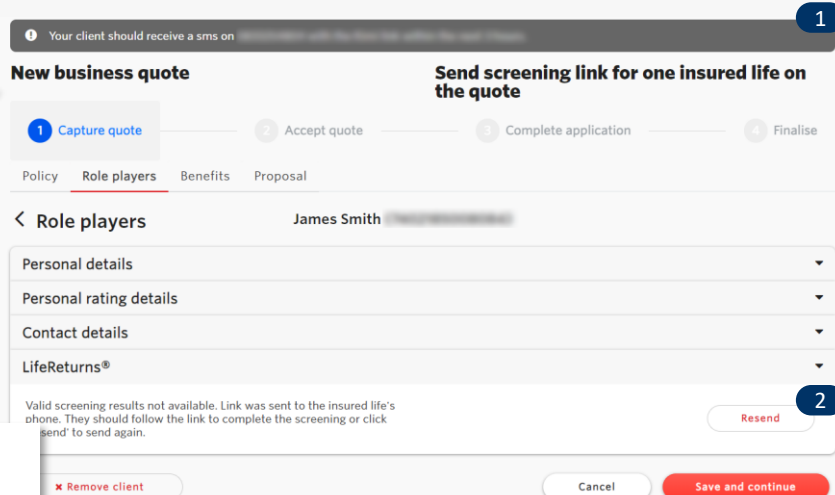
Confirm

How to screen multiple insured lives

Status description:

'Alterations quote: *Incomplete*
and Policy number: *policy #*'

1. The system will show a message that the screening link has been sent.
2. The financial adviser can resend the link at anytime to the insured life again. The '**Resend**' button will only be available while the insured life has not screened yet.



1 Your client should receive a sms on [redacted] with the link to complete the screening.

New business quote

1 Capture quote 2 Accept quote 3 Complete application 4 Finalise

Policy Role players Benefits Proposal

< Role players James Smith [redacted]

Personal details

Personal rating details

Contact details

LifeReturns®

Valid screening results not available. Link was sent to the insured life's phone. They should follow the link to complete the screening or click Resend to send again.

Resend

Remove client Cancel Save and continue

How to screen multiple insured lives

Example of the SMS the insured life will receive

