

How to screen one insured life



Step 1:
Select the 'Role
players' tab

New business quote

**Send screening link for one insured life on
the quote**

1 Capture quote

2 Accept quote

3 Complete application

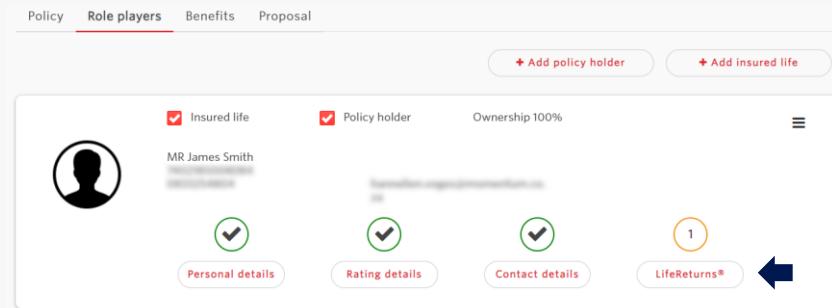
4 Finalise

Policy **Role players** Benefits Proposal

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Step 2:

Click on LifeReturns®
on the Insured life card



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

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Step 3:

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

Policy Role players Benefits Proposal

< Role players James Smith

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

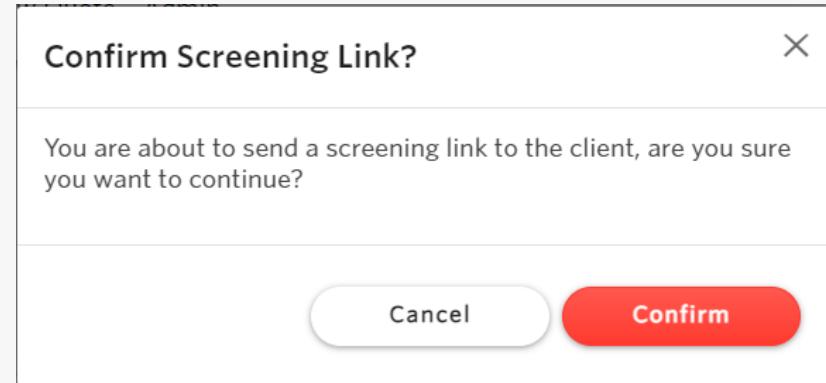
Remove client Cancel Save and continue

1. A status description of **'New Business quote: Incomplete'** indicates that the process is in quote state, a quote has been started, but no quote report (.pdf) has been generated yet.

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Step 4:
Click on 'Confirm'



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

1 Your client should receive a sms on [REDACTED]

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New business quote

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Policy Role players Benefits Proposal

Role players James Smith

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 'send' to send again.

Resend

2

Remove client Cancel Save and continue

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.

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Example of the SMS the insured life will receive

