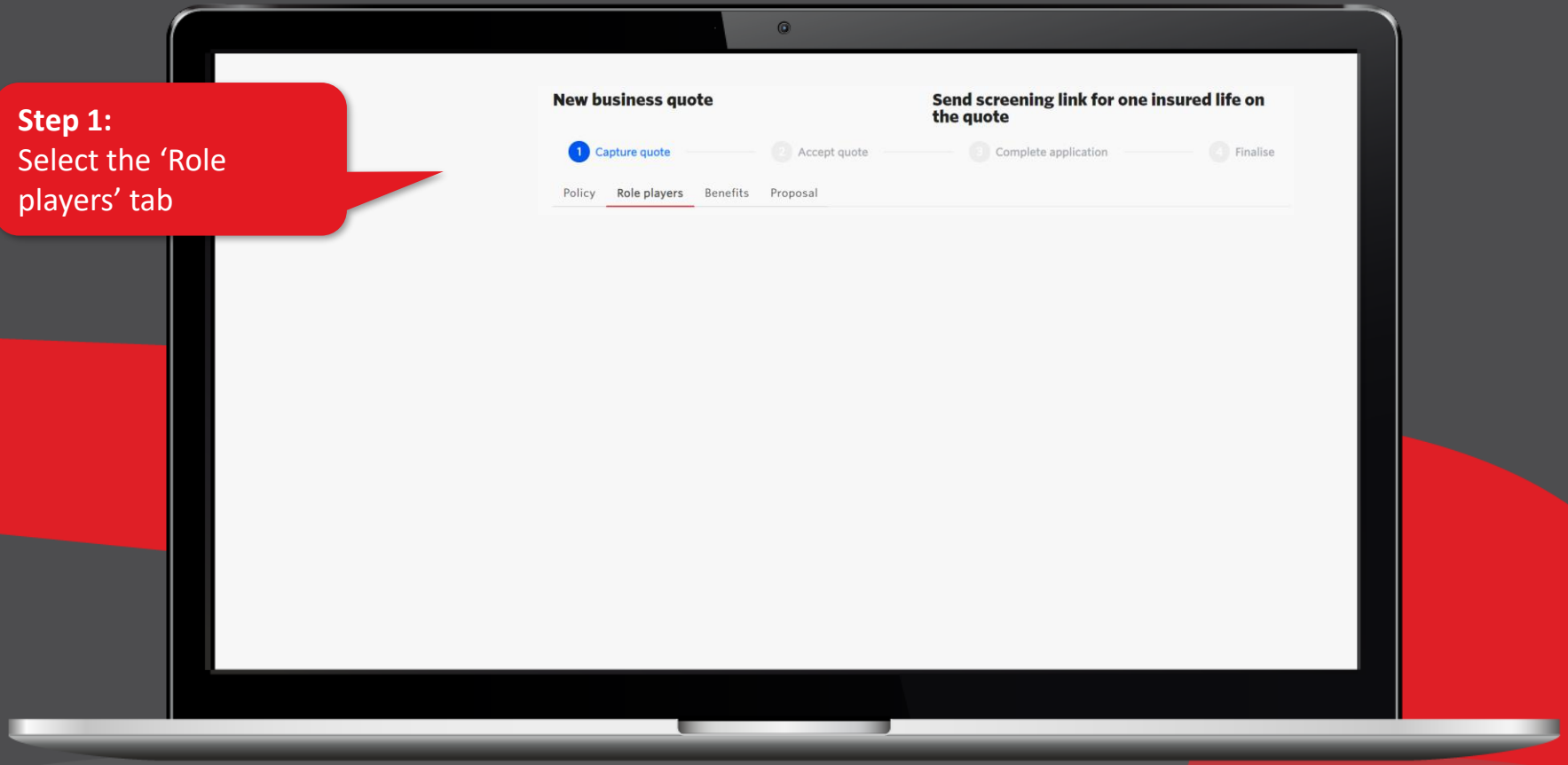
How to screen one insured life

Step 1:
Select the ‘Role players’ tab



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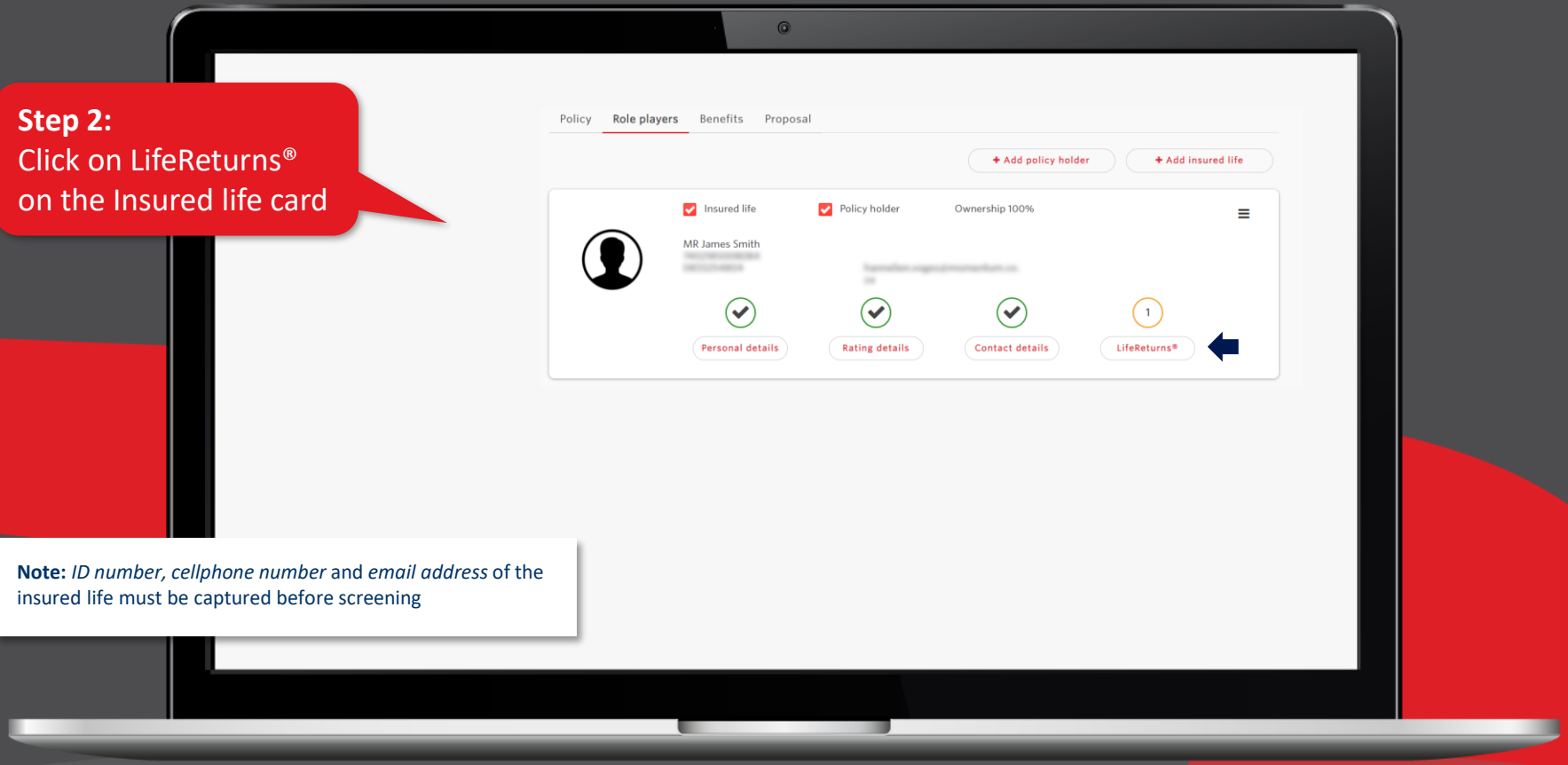
Step 2:
Click on LifeReturns®
on the Insured life card



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

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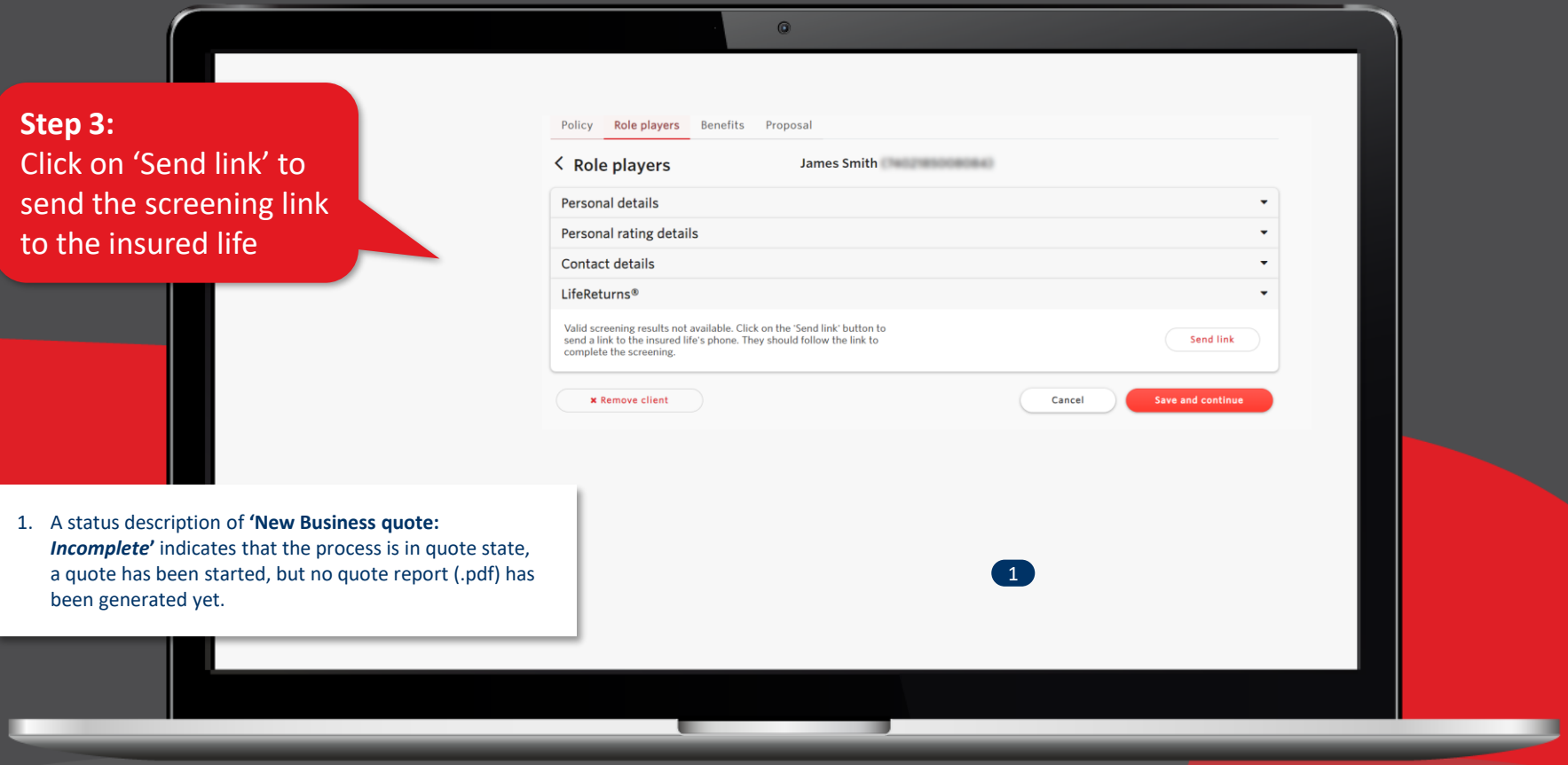
Step 3:
Click on ‘Send link’ to send the screening link to the insured life



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.

1

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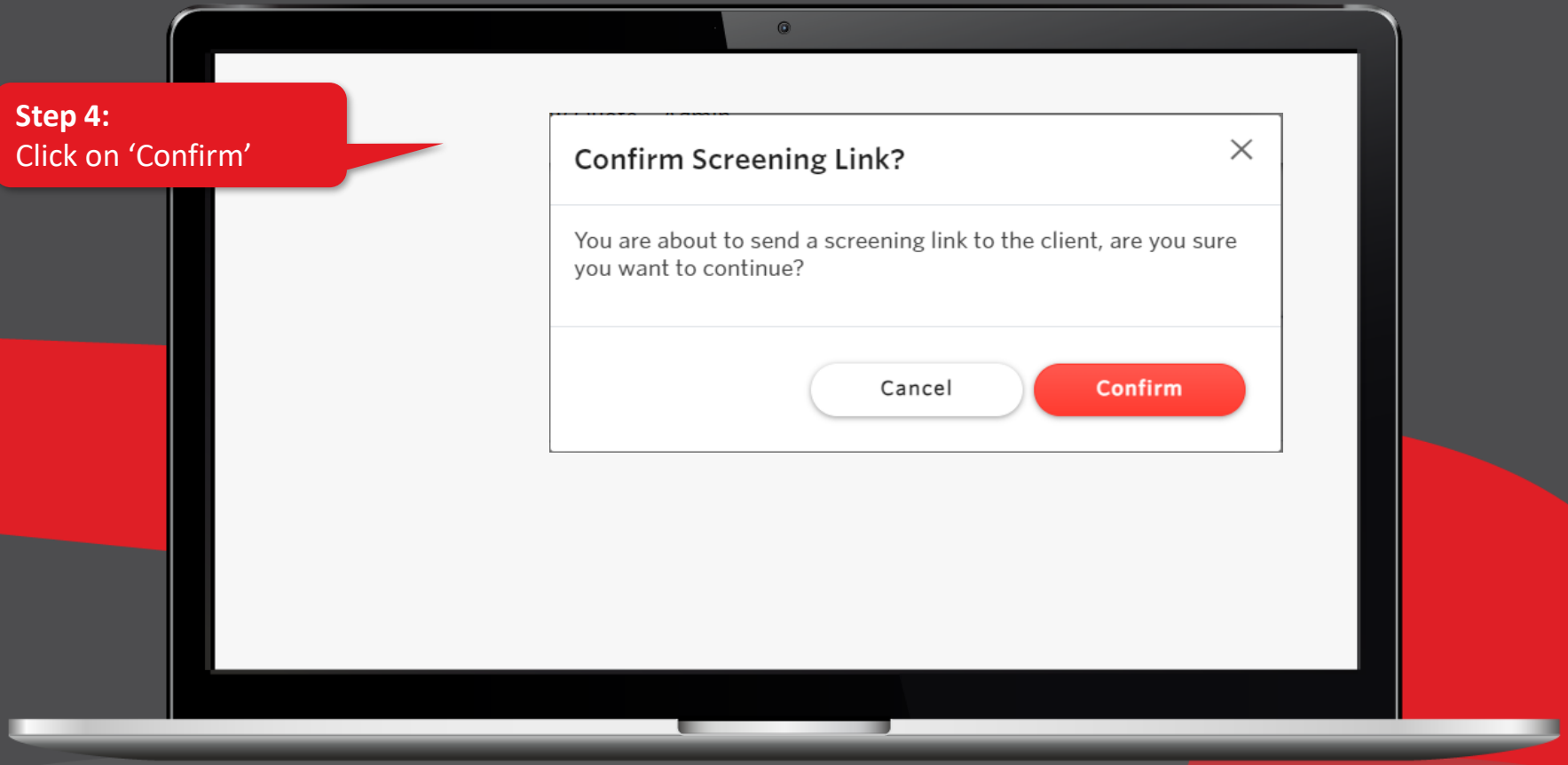
Step 4:
Click on ‘Confirm’



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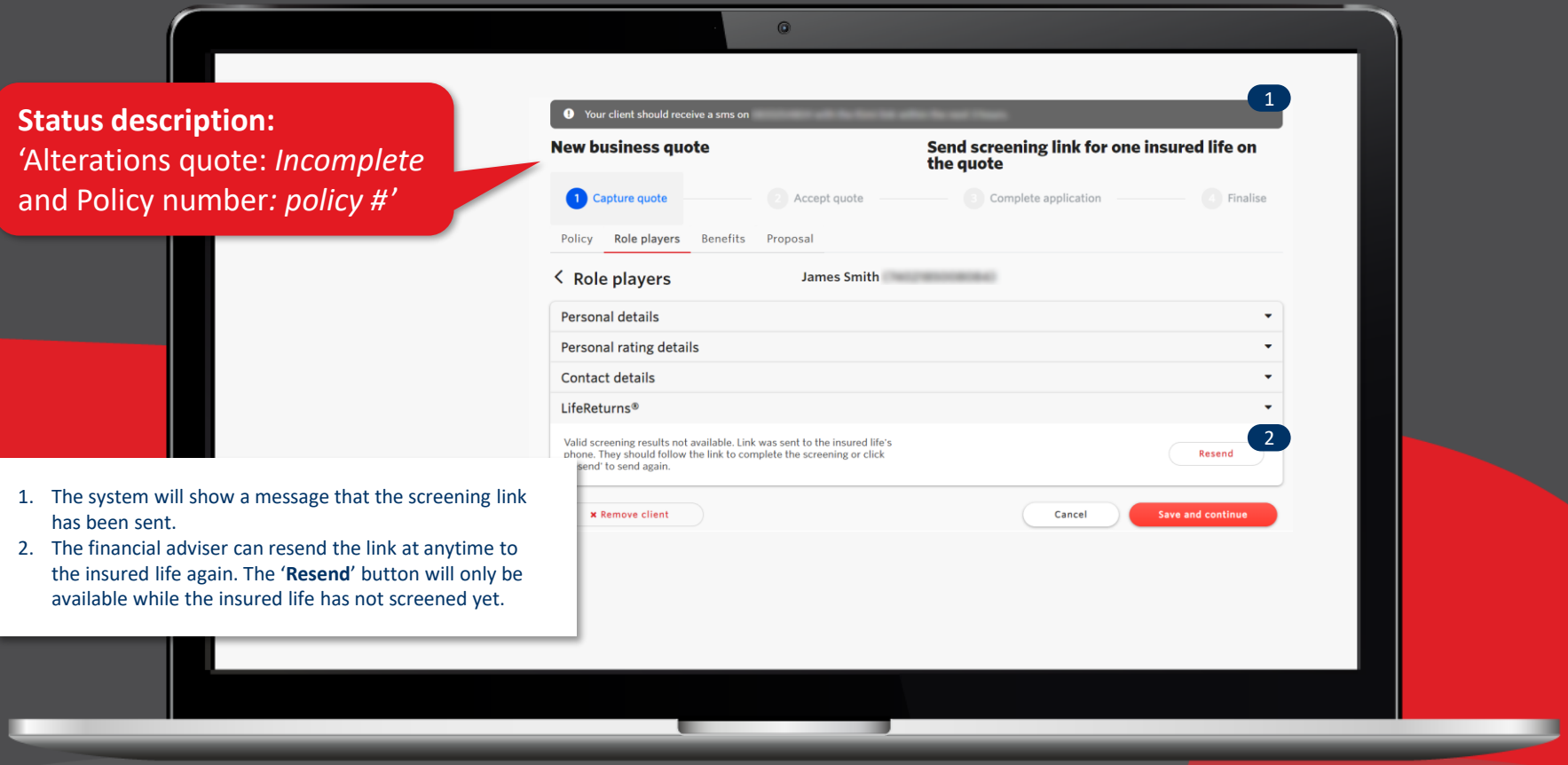
Status description:
'Alterations quote: *Incomplete* and Policy number*: policy #'*



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.

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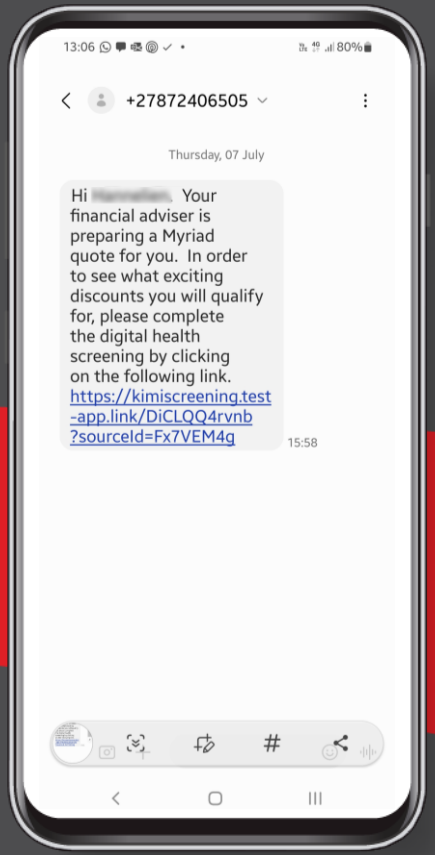
Example of the SMS the insured life will receive