

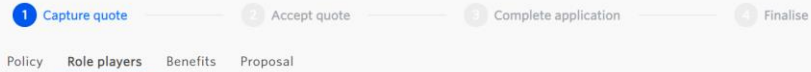
How to screen one insured life



Step 1:
Select the 'Role
players' tab

New business quote

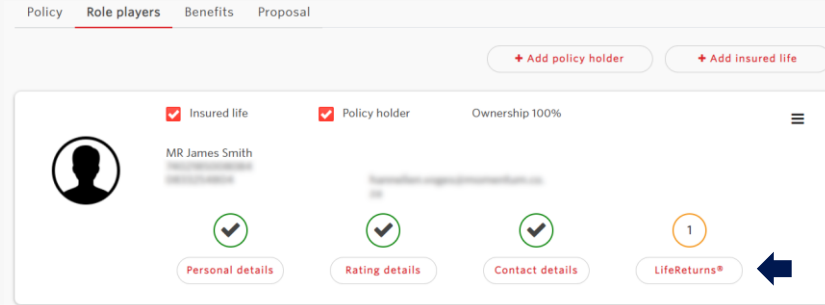
Send screening link for one insured life on the quote



How to screen one insured life

Step 2:

Click on LifeReturns®
on the Insured life card



Policy Role players Benefits Proposal

+ Add policy holder + Add insured life

☒ Insured life ☒ Policy holder Ownership 100%

MR James Smith

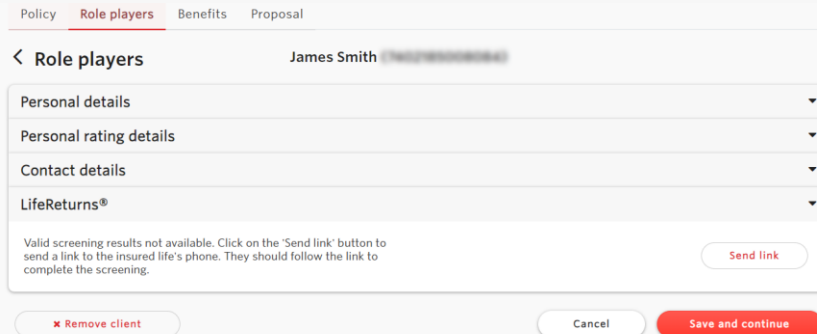
Personal details Rating details Contact details LifeReturns®

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

How to screen one insured life

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.

How to screen one insured life



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

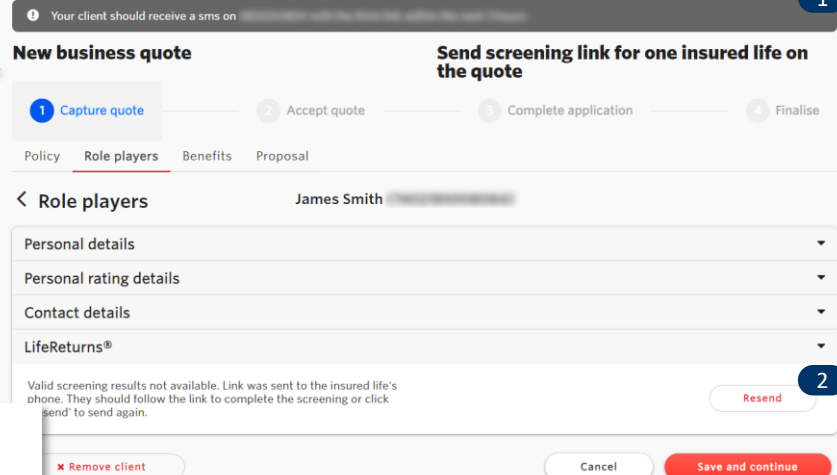
Confirm

How to screen one insured life

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.



The screenshot shows a web application interface for managing a new business quote. At the top, a notification bar states: "Your client should receive a sms on [redacted] with the link to complete the screening." Below this, the main heading is "New business quote". To the right, a sub-heading reads "Send screening link for one insured life on the quote". A progress bar at the top right shows four steps: 1. Capture quote (active), 2. Accept quote, 3. Complete application, and 4. Finalise. Below the progress bar, there are tabs for "Policy", "Role players" (selected), "Benefits", and "Proposal". The "Role players" section shows "James Smith" with a redacted email address. Underneath, there are expandable sections for "Personal details", "Personal rating details", "Contact details", and "LifeReturns®". A message states: "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." A "Resend" button is visible next to this message. At the bottom, there are three buttons: "Remove client" (with a red 'x' icon), "Cancel", and "Save and continue".

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

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

< 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

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Example of the SMS the insured life will receive

