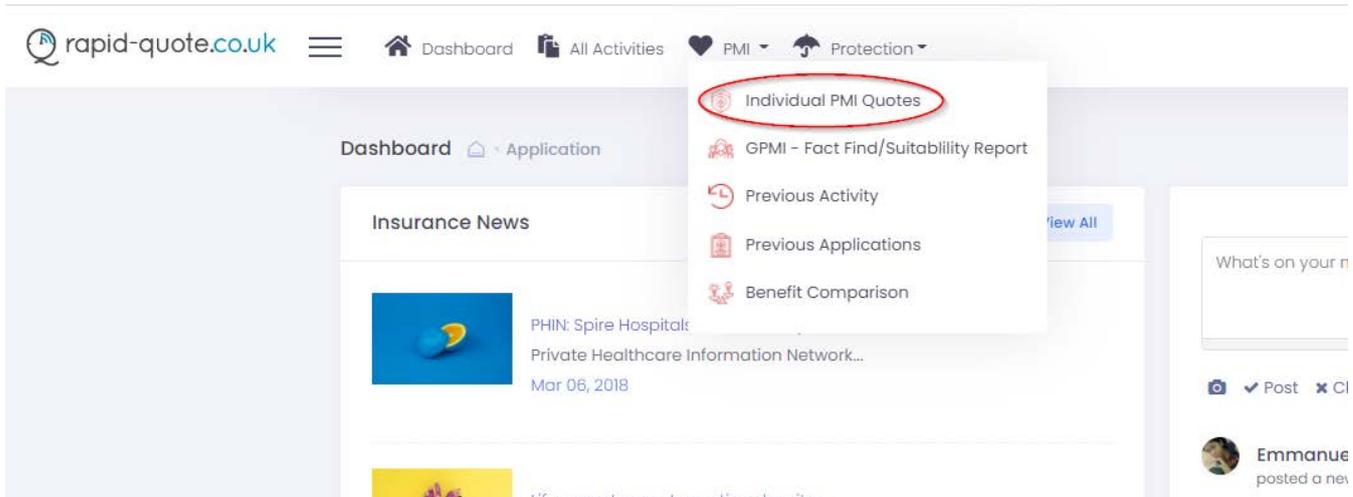


How to Generate a Quick PMI Quote



1. Select Individual Quote from the drop down menu

This screenshot displays the 'Quote Form' and 'Quote Summary' sections. The 'Quote Form' is divided into two main areas: 'Client Details' on the left and 'Member Account Details' on the right. The 'Client Details' section includes a 'NEXT STEP' button, 'Quick Quote' and 'Fact Find' buttons, and a list of options: 'Client Details', 'Family Members', 'Core Policy Options', 'Addons', and 'Insurer Specific Options'. The 'Member Account Details' section includes a 'Keep this quote even after 90 days' button, a 'Cover Start Date' field (02/07/2021), 'Title' (Mr), 'First Name' (John), and 'Last Name' (Test) fields, a 'Date of Birth / Age' field (01/01/1980, 41), 'Gender' (Male), and 'Postcode' (HA7 1JS) field. The 'Quote Summary' section on the right provides a 'view all' of the entered details, including 'General' information (Cover Date, Title, First Name, Last Name, Birthdate, Age, Gender, Postcode, Hospital List, Underwriting, Outpatient, Payment Mode, Preferred Excess, Occupation, Smoker, Policy Type) and 'Insurer Options' (AVIVA NCD Uplift, BUPA Cancer, BUPA GP, BUPA Professional Sportsperson).

2. You will now be presented with the quote form. Start by filling in the basic client information. The quote summary at the side provides a “view all” of the details you have entered. To return a quote the minimum details required are date of birth and postcode.

This screenshot shows the 'Family Members' section of the quote form. It features a 'PREVIOUS' button and a 'NEXT STEP' button. Below these are 'Quick Quote' and 'Fact Find' buttons. The 'Family Members' section includes a list of family members with their 'Date of Birth', 'Age', 'Relationship', and 'Smoker' status. The first member is born on 01/02/1985, is 36 years old, and is a Spouse/Partner who is a Smoker. The second member is born on 02/03/2011, is 10 years old, and is a Spouse/Partner who is a Smoker. There is an 'Add Member' button below the list.

3. Next is the additional family members screen, you are not required to enter names if you do not wish but dates of birth and the relationship to the main policy holder will be required

The screenshot shows a web interface for a 'Quote Form'. On the left is a navigation sidebar with icons and text for 'Client Details', 'Family Members', 'Core Policy Options' (highlighted), 'Addons', and 'Insurer Specific Options'. The main content area is titled 'Core Policy Options' and contains several sections: 'Hospital Rates' with buttons for 'Restricted', 'Full', 'Extended', and 'Guided Option'; 'Underwriting' with buttons for 'Moratorium', 'CPME/Switch', 'CMORI', 'MHD', and 'FMU'; 'Outpatient Cover' with buttons for 'None', 'Limited', and 'Full'; and 'Payment Type' with buttons for 'Monthly' and 'Annual'.

4. Core policy options is where to select the basics of the policy such as underwriting type, hospital list and the level of outpatient your client requires. In this example moratorium has been selected, however if CPME/Switch is selected it will open up more comprehensive options and ask about previous claims etc.

This screenshot shows the 'Quote Form' interface with the 'Addons' section selected in the sidebar. The main content area is titled 'Addons' and lists 'Optional Extras' with several selectable options: 'Therapies and Other Treatments', 'Mental Health (Psychiatric)', 'Optical and Dental', 'Travel', 'Six Week Wait (Applies only to Aviva and Axapp)', and 'Protected NCD (Applies only to Aviva and Axapp)'. The sidebar navigation is identical to the previous screenshot, with 'Addons' highlighted.

- If your client requires any generic add-ons they can be selected here although can be far more fine tuned within insurer specific options. Some add-ons are already in built with some providers and other addons such as 6 week wait are only available with select insurers.

PMI Quotes [Home](#) - Quick Quote

Quote Form

PREVIOUS SUBMIT

Quick Quote Fact Find

- Client Details
Setup Client Details
- Family Members
Add family members
- Core Policy Options
- Addons
(Applies to 2 or more insurers)
- Insurer Specific Options**
Insurance checklists

Insurer Specific Options

Collapse All Uncollapse All

AXAPP

Optional Extras

Extended Cover

Guided Option

NHS Cancer

Please tick that you have authorisation from everyone 16 or over to give their medical details

AXA Consent

AVIVA +

BUPA +

- Insurer specific options is where you can fine tune the cover to recommend to your client. You can simply collapse all to see all the options for each insurer. Here you will see we have selected AXA health and chosen to add Extended Cover. We are now already to get our quote, click the submit button and quotes of all the providers will be returned in seconds.

Comments!

- BUPA Bupa by You - Comprehensive- Parameter error
- BUPA Bupa Fundamental Health insurance- Cannot quote for add-ons for this product.

PMI Quotes [Home](#) - Quick Quote [Back](#)

Quote Form [Quote Summary](#)

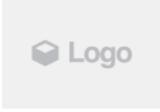
Result [Generate PDF Quote](#) [+ Create Ticket](#) [Show Benefits](#) [Modify Quote](#)

| Voluntary Excess | £0 | £100 | £150 | £200 | £250 | £300 | £500 | £750 | £1000 | £2000 | |
|--|---------|---------|------|------|---------|------|---------|---------|---------|-------|---|
| Freedom Health Insurance Elite - Therapy 750 | £199.72 | £179.75 | | | £169.77 | | £154.78 | | £129.83 | | MORE EDIT |
| AXA Health Insurance Personal Healthcare (Therapy - Full) | £201.32 | £182.86 | | | £157.93 | | £141.01 | | £111.51 | | MORE EDIT |
| Freedom Health Insurance Elite - Therapy 1500 | £206.38 | £185.75 | | | £175.42 | | £159.95 | | £134.15 | | MORE EDIT |
| AXA Health Insurance Health Insurance (Elite) | | | | | | | £216.26 | £203.27 | £186.63 | | MORE EDIT |
| AXA Health Insurance Elite | £274.85 | | | | | | | | | | MORE EDIT |

- Your Quotes are now returned. To exclude quotes you don't want to display on the comparison quote simply click the x button in the top right hand corner of that providers quote box. For the sake of the quote, we will remove Freedom Elite – Therapy 750. Click "Generate PDF Quote" and it will produce a comparison report ready for your client.

YOUR QUOTE RESULT

This quotation was prepared for John Test on 02/07/2021 by Emmanuel Flor of test. Please note that this is for illustration purposes only and although accurate, please refer to recommended insurer below should you require the actual illustration.



-  **Outpatient**
Full
-  **Therapies**
Selected
-  **Hospital List**
Standard
-  **Cancer Cover**
See Brochure
-  **Mental Health**
Selected
-  **Dental/Optical**
Not Selected
-  **Travel Cover**
Not Selected

Personal Details

Cover Start Date: 02/07/2021
 Name: John Test
 Birthdate: 01/01/1980
 Age: 41
 Gender: Male
 Postcode: HA7 1JS
 Smoker: No

Basic Policy Details

Underwriting: Moratorium
 Outpatient Cover: Full
 Hospital Rates: Standard
 Payment Type: Monthly
 Policy Type: Family

Insurer Specific Details

AXAPP: Extended Cover
 Exeter: NCD - NCD Rated

Additional Members

| Voluntary Excess | £0 | £100 | £150 | £200 | £250 | £300 | £500 | £750 | £1000 | £2000 |
|---|---------|---------|------|------|---------|------|---------|---------|---------|-------|
|  Personal Healthcare (Therapy - Full) | £201.32 | £182.86 | | | £157.93 | | £141.01 | | £111.51 | |
|  Elite - Therapy 1500 | £206.38 | £185.75 | | | £175.42 | | £159.95 | | £134.15 | |
|  Health Insurance (Elite) | | | | | | | £216.26 | £203.27 | £186.63 | |
|  Elite | £274.85 | | | | | | | | | |
|  Health+ - Therapy £500 | £276.04 | £242.92 | | | £213.92 | | £193.22 | | £158.72 | |
|  Health+ - Therapy £1000 | £277.78 | £244.45 | | | £215.28 | | £194.45 | | £159.73 | |

- Here is the comparison report which the client will receive. You have the option to add your company logo and adjust the form colours and fonts to match your company branding. Notice the policy we excluded has not been bought through to the PDF.

What the buttons mean on the quote return page and what function they perform

Result

Generate PDF Quote

+ Create Ticket

👁 Show Benefits

Modify Quote

We have already clicked on Generate Pdf Quote but what do these other buttons mean?

+ Create Ticket

Ticket
✕

Please put a brief detail of the issue in the textbox

Subject

Message

This is the simplest way to raise an issue. If you believe there is a problem with a quote you have performed simply click this button and click create and it goes to our service team who aim to rectify any problems within 48 hours.

Show Benefits

Result [Generate PDF Quote](#) [+ Create Ticket](#) [Hide Benefits](#) [Modify Quote](#)

| Voluntary Excess | £0 | £100 | £150 | £200 | £250 | £300 | £500 | £750 | £1000 | £2000 | |
|--------------------------------------|--------------------|-------------------|------------------------------|-----------------------------|--------------------------|-------------------------------|-----------------------------|-------------------|---------|-------|---|
| Personal Healthcare (Therapy - Full) | £201.32 | £182.86 | | | £157.93 | | £141.01 | | £111.51 | | MORE EDIT |
| Inpatient As standard | Outpatient Full | Therapies Full | Hospital List Countrywide | Cancer Cover As standard | Mental Health £20,000 | Dental/Optical Not Covered | Travel Cover Not Covered | Comp Excess £0 | | | |

If you click this buttons it will show at a glance what is covered in each policy that is listed. Benefits can be shown in greater details in the side bar (see sidebar help guide) and also in benefits comparison. To hide benefits you will notice the button has now changed to “hide benefits”, click this and it will return to just displaying prices.

Modify Quote

Modify Quote for John Test ×

Core Options [General Add-Ons](#) [Insurer Add-Ons](#)

Hospital Rates

Outpatient Cover

[Get Quote](#)

Modifying quote is the quickest and easiest way to change the criteria of a quote without having to back into the main quote form. You have all the options of the main quote form without having to go back and fill in the same details again. When you are happy with the options selected then press get quote and it will return a new set of results based on the criteria selected.