

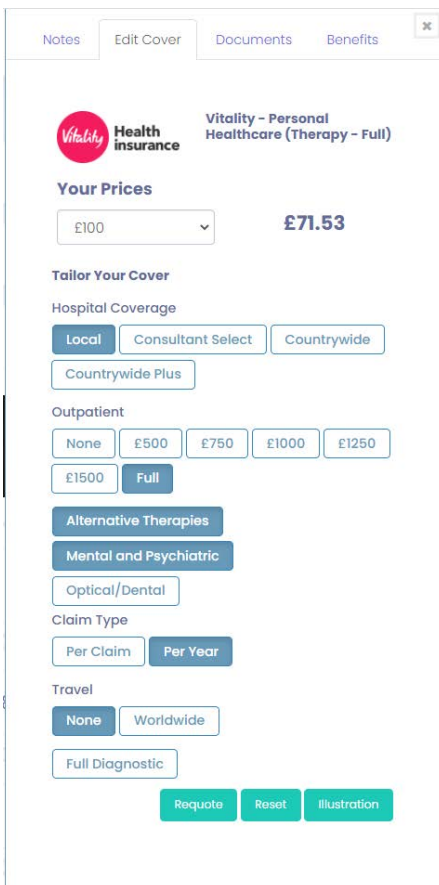
How to Generate Illustrations, Key Feature Documents and Amend Prices By Insurer

(The side Bar)


Voluntary Excess	£0	£100	£150	£200	£250	£300	£500	£750	£1000	£2000	
 Vitality Health Insurance Personal Healthcare (Therapy - Full)	£80.22	£71.53			£60.95		£55.65		£47.37		MORE EDIT

When Quotes have been returned and there are several comparison results to choose from you have the option to go into each insurer and either get more information and documents in reference to that product, generate illustration documents. The more button will take you into more information about the policy and the edit button will take you directly to the amend cover panel.

Edit Cover



Notes Edit Cover Documents Benefits

 Vitality Health Insurance
Vitality - Personal Healthcare (Therapy - Full)

Your Prices

£100 **£71.53**

Tailor Your Cover

Hospital Coverage

Local Consultant Select Countrywide

Countrywide Plus

Outpatient

None £500 £750 £1000 £1250

£1500 Full

Alternative Therapies

Mental and Psychiatric

Optical/Dental

Claim Type

Per Claim Per Year

Travel

None Worldwide

Full Diagnostic

Requote Reset Illustration

Excess: There is the option to select an excess via the dropdown that will instantly change the prices without any requote needing to be done, this is because when a quote is requested it automatically brings back all excess options for speed cutting down on click time.

Tailoring the Clients Cover: Now that you are in the Quote that is potentially going to be sold there are all the same options available as would be if you were in that insurer's portal. Simply change the options to suit your clients needs and press requote. Pressing the Reset button will reset to the original quote criteria.

Illustration: Click illustration and based on the options selected an illustration will be generated for the client.

Documents

The screenshot shows the 'Documents' tab for a Vitality Health Insurance policy. At the top, there are navigation tabs: 'Notes', 'Edit Cover', 'Documents' (selected), and 'Benefits'. Below the navigation, the Vitality logo and 'Health Insurance' are displayed, along with the policy name 'Vitality - Personal Healthcare (Therapy - Full)'. The 'Your Prices' section shows a dropdown menu set to '£100' and a price of '£71.53'. The 'Documents' section contains a list of document categories: 'Rapid Quote Documents', 'Illustration', 'IPID', 'Application Forms', 'Insurer Documents', 'Policy Brochures', and 'Sales Aids'.

This screenshot shows the 'Documents' tab for the same Vitality Health Insurance policy, but with a different set of documents. The navigation and pricing are identical to the previous screenshot. The 'Documents' list includes: 'Rapid Quote Documents', 'IPID', 'Application Forms', 'Insurer Documents', 'IPID', 'Guide to Vitality Programme', 'Hospital List', 'Policy Brochures', and 'Sales Aids'.

Documents: general Documents such as policy brochures, key features and IPIDS can be found here.

Rapid Quote Documents: Illustrations are available here (as well as on the edit cover screen). Suitability reports will also appear here if available. These are only available to edit and download if a fact find has been filled in. If a regular quick quote has been quoted it will not appear.

Benefits

The screenshot shows the 'Benefits' tab for a Bupa health insurance policy. At the top, there are navigation tabs: 'Notes', 'Edit Cover', 'Documents', and 'Benefits' (selected). Below the navigation, the Bupa logo and 'Bupa - Bupa by You - Comprehensive' are displayed. The 'Your Prices' section shows a dropdown menu set to '£0' and a price of '£104.45'. The 'Benefits' section contains a list of benefit categories with checkboxes: 'Therapies' (checked), 'Heart/Cancer Upgrade' (checked), 'Travel Cover' (unchecked), 'Mental Health Cover' (checked), and 'Dental' (unchecked). Below each category, there is a brief description of the benefit. For example, under 'Mental Health Cover', it states: 'O/P mental health therapies covered in full. In/patient and day/case limited to 28 days in-patient or day patient care (combined) each year'. At the bottom, there is a note: 'Extended - Children on the policy will be'.

The benefits tab will show at a glance what that particular policy provides and provides a summary of add-ons and core cover. This information is for the broker only and will not be displayed to the client.