

# Legal & General OLP Connect New Business User guide.

**i** This is not a consumer advertisement.  
It is intended for Professional Financial Advisers and should  
not be relied upon by private customers or any other persons.

The screenshot shows the AGENTHUB interface. At the top, there are navigation links for 'Logout', 'New application', and 'Menu'. The main header is 'AGENTHUB'. Below this, there are two tabs: 'New applications' (active) and 'Existing policies'. On the left, there is a 'Search criteria' section with various input fields: Surname, Forename, Date of birth (dd/mm/yyyy), Postcode, Reference number type (dropdown), Reference number, Applications modified within the last (dropdown), Life agent number (dropdown), Application status (dropdown), and Outstanding information items (dropdown). There are 'Search' and 'Clear' buttons. Below the search criteria is a 'Useful links' section. The main content area is titled 'Progress' and contains several widgets. The first widget is 'Your quotes' with three buttons: 'Expired 602', 'Expiring 33', and 'Total 757'. The second widget is 'Your incomplete applications' with three buttons: 'You've handed off 44', 'They've handed back 18', and 'You need to finish 1084'. The third widget is 'Applications you can submit' with a button 'You can submit 21'. The fourth widget is 'We need more information' with a button 'We need information 474'. The fifth widget is 'We're assessing your applications' with a button 'You need a decision 1091'. The sixth widget is 'Applications with decisions' with two buttons: 'Declined/postponed 28' and 'You need to complete 946'. The seventh widget is 'Confirm your details' with three buttons: 'Final reviews 564', 'Reviewed 136', and 'Issued 920'. The eighth widget is 'Live policies that you're amending' with three buttons: 'You're changing 75', 'We're re-assessing 478', and 'You can complete 45'. At the bottom, there is a 'Power Searches' section with three links: 'Accept UW Decision', 'Underwriting decision made client / adviser action required to start policy', and 'Premium Quoted about to Expire'. The footer contains the 'EVERY DAY MATTERS.' logo, a list of policies (Accessibility, Security, Legal and regulatory, Privacy policy, Cookie policy), the copyright notice '© Legal & General Group plc 2017', and the 'Legal & General' logo.

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1 ▶ **Menu**

It's really important to ensure that you check your contact preferences and confirm that we have the correct email address for you, so that you can benefit from these changes.

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Please check/update these preferences by clicking on the Menu at the top-right of your screen.

2 ▶ **New application**

Click this button to create a new application and quote for one or more products.

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3 ▶ **Search criteria**

On the Agenthub homepage, enter the client's surname. If you know the first name, date of birth or postcode of the client, you can enter those too; then click the **Search** button to view the results.

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If you know the AN number, first select **Application number** from the **Reference number type** dropdown menu, then you'll need to enter the AN number in the Reference number field. Again, click the **Search** button to view the results.

4 ▶ **Progress**

- The Progress section contains widgets that represent stages in our application process.
- Each widget shows you how many applications are sitting at key points in the process and give you access to a breakdown of what's needed to move them forward.
- Clicking each button in a widget takes the user to relevant filtered search results pages.
- Progress data can be refined to a specific date range using the date filters.

5 ▶ **Your quotes widget**

Buttons show total number of quotes you have in progress and of those, which are expiring and which have expired.

6 ▶ **Your incomplete applications widget**

Buttons show total number of applications that you need to finish so that they're ready to submit to us and of those, which you've handed off to clients and which they've handed back to you.

The screenshot shows the AGENTHUB interface. At the top, there are links for 'Logout', 'New application', and 'Menu'. The main header is 'AGENTHUB'. Below this, there are two tabs: 'New applications' (active) and 'Existing policies'. On the left, there is a 'Search criteria' section with various input fields: Surname, Forename, Date of birth (dd/mm/yyyy), Postcode, Reference number type (dropdown), Reference number, Applications modified within the last (dropdown), Life agent number (dropdown), Application status (dropdown), and Outstanding information items (dropdown). There are 'Search' and 'Clear' buttons. Below the search criteria is a 'Useful links' section with a plus sign. The main content area is titled 'Progress' and includes a 'Clear date filter' link. It contains several progress widgets:
 

- Your quotes:** Expired (602), Expiring (33), Total (757)
- Your incomplete applications:** You've handed off (44), They've handed back (18), You need to finish (1084)
- Applications you can submit:** You can submit (21)
- We need more information:** We need information (474)
- We're assessing your applications:** You need a decision (1091)
- Applications with decisions:** Declined/postponed (28), You need to complete (946)
- Confirm your details:** Final reviews (564), Reviewed (136), Issued (920)
- Live policies that you're amending:** You're changing (75), We're re-assessing (478), You can complete (45)

 At the bottom, there is a 'Power Searches' section with links: 'Accept UW Decision', 'Underwriting decision made, client / adviser action required to start policy', and 'Premium Quoted about to Expire'. The footer includes the 'EVERY DAY MATTERS.' logo, accessibility and security links, copyright information for Legal & General Group plc 2017, and the Legal & General logo.

- 7 ▶ **Applications you can submit widget**  
Button shows total number of your applications that you can submit to us. We're unable to work on these until they're submitted.
- 8 ▶ **We need more information widget**  
Button shows total number of your submitted applications for which we need information from your client before we can provide an underwriting decision/offer.
- 9 ▶ **We're assessing your applications widget**  
Button shows total number of your applications for which you need a decision. We're working on these now and will update you shortly.
- 10 ▶ **Applications with decisions**  
Declined / postponed shows your applications where all products have been declined and/or postponed within a single application. You need to complete shows your applications that can be completed once you have provided us with a policy start date or any other required information. Please remember that you need to tell your customer(s) about our decision(s).
- 11 ▶ **Confirm your details widget**  
Buttons show how many clients (lives) you have for which we are awaiting a CYD action to be completed. You should remind your customers that these need to be finalised.
- 12 ▶ **Live policies that you're amending**  
Button shows how many customers you have for whom policies may require amendments after they have gone live.
- 13 ▶ **Power searches**  
At a single click you can list all your applications which...
  - a. ...have an underwriting decision in place and we need you to confirm whether your client accepts it.
  - b. ...have an underwriting decision but no start date yet and/or the quote expiry date has been passed.
  - c. ...will soon need a re-quote because the premium rates they are based on are about to go out of date.

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**Search criteria** ⓘ

1. Forename must be used with surname  
2. Date of birth must be used with at least one other field

Surname

Forename

Date of birth

Postcode

Reference number type

Reference number

Applications modified within the last

Life agent number

Application status

Outstanding information items

**SEARCH**

**CLEAR**

**Search results > We need more information** Filter:

App No.	Your Ref.	Client Name	DOB	Status	Last Updated
<a href="#">AN12943031</a>	SMR_AGE_SA_SMR0	Testcasetwo, S	1979-08-19	Submitted	10/03/2017
<a href="#">AN12570082</a>		Black, I Black, A	1967-12-09 1975-02-25	Submitted	10/03/2017
<a href="#">AN12962025</a>	Mark Ting dipFS	Payn, C Payn, C	1980-12-12 1980-08-19	Submitted	09/03/2017
<a href="#">AN12943149</a>	Campaign - DNT	Payne, C Payne, C	1980-08-19 1979-02-14	Submitted	08/03/2017
<a href="#">AN12962720</a>		Testcasesix, D Testcasesix, T	1975-08-19 1989-01-00	Submitted	08/03/2017
<a href="#">AN12959895</a>		Testcasetwo, T Testcasetwo, T	1969-11-09 1976-03-25	Submitted	03/03/2017
<a href="#">AN12940857</a>		Pipeline, D	1991-06-13	Submitted	10/01/2017
<a href="#">AN12829775</a>	Low-Cost Retest	Low-Cost Retest, A	1980-10-01	Submitted	01/07/2016
<a href="#">AN10910655</a>		Wat-Testseven, R Wat-Testseven, S	1975-09-11 1978-08-12	Submitted	11/06/2012
<a href="#">AN11137800</a>		Perret, T	1967-07-12	Submitted	21/04/2012

**HOME**

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**Info icons**

Clicking any of the info icons will display a brief description for the screen content it relates to.

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**Search results**

Here's an example of how the search results will look, with column headers varying depending on search or widget button used. Click an AN Reference to view **Application Management**.

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**Summary**

This application is in read only mode. Select **EDIT** to update and amend.

AN12962025 Your ref: Mark Ting dipFS  
Submitted: 07/03/2017 Expiry Date: 07/03/2018 Source: On-line

**Life Summary**

**Mr Cameron Payn**

Application Outstanding Assessing Ready to complete Complete

Evidence Required	Product	Date Requested	What you can do
Saliva test	All	07/03/2017	Tests are included as part of your customer's examination. We'll update you once we've received and assessed the results.
Nurse Screening Examination with tests	All	07/03/2017	We need your customer to have a medical exam. Please ensure that they have arranged an examination date.
Blood Test	All	07/03/2017	Tests are included as part of your customer's examination. We'll update you once we've received and assessed the results.

**Mrs Camilla Payn**

Application Outstanding Assessing Ready to complete Complete

Action	Product Name	Description	Date task created
Provide start date	1. Life Insurance with Critical Illness Cover	Please provide a start date for this policy by: 1. Clicking 'Edit' (top of screen) 2. Click 'Manage application' 3. Under 'Outstanding Information Items', click the 'Product Start Date' link. 4. Enter start date and submit to complete policy.	07/03/2017

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16 ▶ **Application summary (within Application Management)**

This screen gives you an overview of the current status of an application, including any **Evidence/Outstanding Information Items** for each life to be covered, to quickly and easily see what you can do to progress it to the next application status.

17 ▶ **Life summary - Outstanding**

In this example, Life 1 requires some medical examinations and tests before the application can proceed. This means the application is held at the **Outstanding** stage. The customer should provide dates for these appointments and once we have received the required reports, the application can proceed to the **Assessing** stage.

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**NOTE**

**Assessing** means that Legal & General's application support teams will be reviewing the application and we'll notify you when we have an update.

18 ▶ **Life summary - Ready to complete**

In this example, Life 2 has provided all of the details required for us to provide a final underwriting decision. This will display at the **Ready to complete** stage and will be held there until Life 1 has provided all of their outstanding requirements and we have provided a final underwriting decision for both lives.

**Summary**

This application is in read only mode. Select **EDIT** to update and amend.

**AN12985345**  
Submitted: 04/05/2017 Expiry Date: 04/05/2018 Source: On-line

**Life Summary**

**Mr Svdgtyg Dfgtyg**

Application Outstanding Assessing **Ready to complete** Complete

Action	Product Name	Description	Date task created
Provide start date	1 . Life Insurance	Please provide a start date for this policy	04/05/2017
Provide DD	1 . Life Insurance	Please provide the payment details for this policy	04/05/2017

**Mrs Fghhghghp Osrname**

Application Outstanding Assessing **Ready to complete** Complete

Action	Product Name	Description	Date task created
Provide start date	2 . Life Insurance	Please provide a start date for this policy	04/05/2017
Provide DD	2 . Life Insurance	Please provide the payment details for this policy	04/05/2017

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- 19 ▶ **Provide Start Date / DD / Accept Offer**  
Where a decision has been given but we are still awaiting information, to save time clicking this button will take you to relevant field in the application journey

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The screenshot displays the OLP Connect application interface. At the top, there are 'LOGOUT' and 'MENU' buttons. The main header includes the 'Legal & General' logo and the text 'OLP Connect'. A navigation sidebar on the left lists various application management options. The main content area shows application details for AN12862025, including submission and expiry dates, agent information, and team details. It features several expandable sections: 'Outstanding Information Items' with a table of items (Product Start Date, Joint, 1. Life+CIC, Required, 10/03/2017); 'LA1 Outstanding Evidence' with a table of evidence items (Saliva test, Nurse Screening Examination with tests, Blood Test); 'LA2 Outstanding Evidence' (currently empty); 'Product Details' with a table showing product features (1. Life+CIC, £84.59 Premium, £100,000.00 Cover, 05/06/2017 Quote Expires); 'Special Circumstances'; and 'Protection Customer Services Tasks'. The footer contains the 'EVERY DAY MATTERS.' logo, accessibility links, and the Legal & General logo.

20 ▶ **Manage application**

- Click here if you need more detailed information for any type of outstanding information, which could also include:
- Start date, Direct Debit details, Policy Owner Declaration (which must be received before the policy can start).
  - Trust Forms, Checking Your Details forms (which don't prevent the policy from starting).

21 ▶ **Evidence/Outstanding information items**

The Status will show as **Issued** or **Required** until they are received.

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All received items can also be viewed by clicking **All Items** in any of the "Outstanding..." sections.

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**Product details**

This table shows the very latest Product Status from the following list:

- **Referred** underwriting decision not made yet
- **Further evidence required** underwriting evidence needed/outstanding
- **Decision made** final underwriting decision after all evidence requirements received
- **Complete** product in-force and being automatically updated (at this stage the action may be cancelled by Protection Customer Services, within a limited time window).
- **Live** product now fully in-force.

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**Legal & General** LOGOUT MENU **OLP Connect**

**Correspondence**

This application is in read only mode. Select **EDIT** to update and amend.

AN12862025 Your ref: Mark Ting dipFS  
 Submitted: 07/03/2017 Expiry Date: 07/03/2018 Source: On-line

Agent: **Narhana IFAuser5048882**

Team: **Default Non IFA Team**  
 Team Display Name: **Default Non IFA Team**  
 Team Telephone Number: **0845 270 0488**  
 Team Fax Number: **0845 674 0827**  
 Team Email Address: **defaultNon@landg.com**  
 Team Opening Hours: **09:30 - 17:00**

Agency Name: **Les Grinter Ltd**  
 Registered Agency Name: **Les Grinter Ltd**  
 Agency Telephone Number:  
 Agency Fax Number:  
 Agent Email:

**LA1: Mr Cameron Payn**

Address line1: Legal & General Assurance Society L	DOB: 19/08/1980
Post code: BN3 7PY	Smoker status: No
Telephone Number: 01234567890 (Mobile)	Life UW status: Evidence outstanding
Checking your details: Not issued	Private data: No
Handover stage:	

**LA2: Mrs Camilla Payn**

Address line1: Legal & General Assurance Society L	DOB: 12/12/1980
Post code: BN3 7PY	Smoker status: No
Telephone Number: 01234567890 (Mobile)	Life UW status: Decision made
Checking your details: Not issued	Private data: No
Handover stage:	

**Outbound Correspondence**

Filter:

Item	Life	Product	Name	Recipient	Address	Destination	Status	Date
<a href="#">Copy Application</a>	Both		Narhana IFAuser	Agent	Test 3	Agent	Issued	07/03/2017
<a href="#">Consent Confirmation email</a>	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">Consent Confirmation letter</a>	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">Consent Confirmation email</a>	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">Consent Confirmation letter</a>	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">General Warning email</a>	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">Joint life email</a>	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
<a href="#">Nurse Screening Examination with tests</a>	LA1		Medicals Direct	Third Party Medical Agency		Third Party Medical Agency	Issued	07/03/2017
<a href="#">Emessage Form</a>	LA1		Medicals Direct	Third Party Medical Agency		Third Party Medical Agency	Issued	07/03/2017

No inbound correspondence items have been logged with this application.

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**What documentation is available to print?**

Various items are available to print throughout the quote, apply and case management stages.

23 ▶ Click on the **Correspondence** menu and then on **Outbound correspondence**.

24 ▶ **How to print (submitted application)**  
 Click on the item name and then View Image to open the PDF document which can then be printed.

You can currently print the following items:

- Personal quote (quote / live)
- Policy summary (quote / live)
- Policy booklet (live)
- Medical consent form
- Copy application
- Offer email (and reviews)
- Offer letter (submitted and accepted applications)
- General warning email