

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.

3 ▶

The screenshot shows the AGENTHUB interface. On the left is a 'Search criteria' sidebar with fields for Surname, Forename, Date of birth, Postcode, Reference number type, Reference number, Applications modified within the last, Life agent number, Application status, and Outstanding information items. Below these are 'SEARCH' and 'CLEAR' buttons. The main area is titled 'NEW BUSINESS' and 'EXISTING POLICIES'. It features a 'Progress' section with a 'Clear date filter' button and date range inputs. The progress section contains several widgets: 'YOUR QUOTES' (Expired 715, Expiring 22, Total 829), 'YOUR INCOMPLETE APPLICATIONS' (You've handed off 29, They've handed back 10, You need to finish 1861), 'APPLICATIONS YOU CAN SUBMIT' (You can submit 15), 'WE NEED MORE INFORMATION' (We need information 9), 'WE'RE ASSESSING YOUR APPLICATIONS' (You need a decision 1228), 'APPLICATIONS YOU CAN COMPLETE' (You need to complete 759), 'CONFIRM YOUR DETAILS' (Final reviews 515, Reviewed 133, Issued 977), and 'LIVE POLICIES THAT YOU'RE AMENDING' (You're changing 85, We're re-assessing 214, You can complete 225). At the bottom, there are 'Power Searches' and a footer with 'EVERY DAY MATTERS' and 'Legal & General' logos.

◀ 1

◀ 2

◀ 4

◀ 5

◀ 6

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.

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.

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.

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.

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.

2 ▲

- 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 you can complete**
Button shows total number of your applications that have received an underwriting decision but for which a policy start date is missing (additional information may also be outstanding).
- 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 had something happened to them in the last week.
 - b. ...are ready to be submitted.
(i.e. all application questions are complete)
 - c. ...have an underwriting decision in place and we need you to confirm whether your client accepts it.
 - d. ...have an underwriting decision but no start date yet and/or the quote expiry date has been passed.
 - e. ...will soon need a re-quote because the premium rates they are based on are about to go out of date.

14 ▶

AGENTHUB

LOGOUT NEW APPLICATION MENU

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
AN12943031	SMR_AGE_SA_SMR0	Testcasetwo, S	1979-08-19	Submitted	10/03/2017
AN12570082		Black, I Black, A	1967-12-09 1975-02-25	Submitted	10/03/2017
AN12962025	Mark Ting dipFS	Payn, C Payn, C	1980-12-12 1980-08-19	Submitted	09/03/2017
AN12943149	Campaign - DNT	Payne, C Payne, C	1980-08-19 1979-02-14	Submitted	08/03/2017
AN12962720		Testcasesix, D Testcasesix, T	1975-08-19 1989-01-09	Submitted	08/03/2017
AN12959895		Testcasetwo, T Testcasetwo, T	1969-11-09 1976-03-25	Submitted	03/03/2017
AN12940857		Pipeline, D	1991-06-13	Submitted	10/01/2017
AN12829775	Low-Cost Retest	Low-Cost Retest, A	1980-10-01	Submitted	01/07/2016
AN10910655		Wat-Testseven, R Wat-Testseven, S	1975-09-11 1978-08-12	Submitted	11/06/2012
AN11137809		Perret, T	1967-07-12	Submitted	21/04/2012

HOME

EVERY DAY MATTERS

[Accessibility](#) | [Security](#) | [Legal and regulatory](#) | [Privacy policy](#) | [Cookie policy](#)

© Legal & General Group plc 2017

◀ 15

14 ▶

Info icons

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

15 ▶

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**.

Legal & General OLP Connect – July Update

16 ▶

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 Payne

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 Payne

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

EVERY DAY MATTERS.

Accessibility | Security | Legal and regulatory | Privacy policy | Cookie policy

© Legal & General Group plc 2017

◀ 17

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.

◀ 18

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.

Legal & General OLP Connect – July Update

Legal & General

LOGOUT MENU

OLP Connect

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. Svrtgdtfg Dfgdfg

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 Fgjhkjhjkp Osurname

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

19

- 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

20 ▶

Legal & General LOGOUT MENU **OLP Connect**

Summary
 This application is in read only mode. Select **EDIT** to update and amend.
AN12862025 Your ref: **Mark Ting djpFS**
 Submitted: 07/03/2017 Expiry Date: 07/03/2018 Source: On-line
 Agent: **Narthana IFAuser5046882** Team: **Default Non IFA Team**
 LA1: **Mr Cameron Payn**
 LA2: **Mrs Camilla Payn**

Outstanding Information Items Current Items | All Items There are Open Items

Description	Life	Product	Status	Reason	Date Updated	Review Date	Next Review Action
Product Start Date	Joint	1. Life+CIC	Required		10/03/2017		

LA1 Outstanding Evidence Current Items | All Items

Item	Status	Last Updated	Review Date	Next Review Action	Examination Date
Saliva test	Issued	08/03/2017	22/03/2017	Review 1	15/03/2017
Nurse Screening Examination with tests	Issued	08/03/2017	22/03/2017	Review 1	15/03/2017
Blood Test	Issued	08/03/2017	22/03/2017	Review 1	15/03/2017

Product Details

Product	Life	Product Status	Policy No	Cover	Premium	Quote Expires	Start Date	Underwriting Decision
1.Life+CIC Product Features (Life+CIC) Description: Life Insurance with Critical Illness Cover (Waiver, Total and Permanent Disability) Term: 20 years Life: Joint Product Expiry Date: 07/03/2018 CIC: Yes TPD: Own Occupation GIO: Yes Waiver: Both Indexation: No Indexation Type: Level Guaranteed/Reviewable Premium: Guaranteed	Joint	Referred		£100,000.00	£84.59 Premium Collection Features Premium Frequency: Monthly Collection Day Of Month: 01	05/06/2017		LA1 : Further Evidence Required LA2 : Standard Terms

Special Circumstances

Protection Customer Services Tasks Current Tasks | All Tasks

EVERY DAY MATTERS® © Legal & General Group plc 2017

◀ 21

◀ 22

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).

Evidence/Outstanding information items

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

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

22 ▶

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.

23 ▶

Legal & General LOGOUT MENU **OLP Connect**

Correspondence
 Application Management - Manage Application - Application Summary - **Correspondence** - Print - View - Application Details - Contact and History - Application History - Updates - Amend Application - Manage Addresses - NTU

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

Agent: **Narhana IFAuser5046982**
 Agency Name: **Les Grinter Ltd**
 Registered Agency Name: **Les Grinter Ltd**
 Agency Telephone Number:
 Agency Fax Number:
 Agent Email:

Team: **Default Non IFA Team**
 Team Display Name: **Default Non IFA Team**
 Team Telephone Number: **0945 270 0485**
 Team Fax Number: **0945 874 0827**
 Team Email Address: **defaultNon@landg.com**
 Team Opening Hours: **09:30 - 17:00**

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
Copy Application	Both		Narhana IFAuser	Agent	Test 3	Agent	Issued	07/03/2017
Consent Confirmation email	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
Consent Confirmation letter	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
Consent Confirmation email	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
Consent Confirmation letter	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
General Warning email	LA1		Cameron Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
Joint life email	LA2		Camilla Payn	Client	Legal & General Assurance Society L	Client	Issued	07/03/2017
Nurse Screening Examination with tests	LA1		Medicals Direct	Third Party Medical Agency		Third Party Medical Agency	Issued	07/03/2017
Emessage Form	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.

EVERY DAY MATTERS® Accessibility | Security | Legal and regulatory | Privacy policy | Cookie policy
 © Legal & General Group plc 2017

◀ 24

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