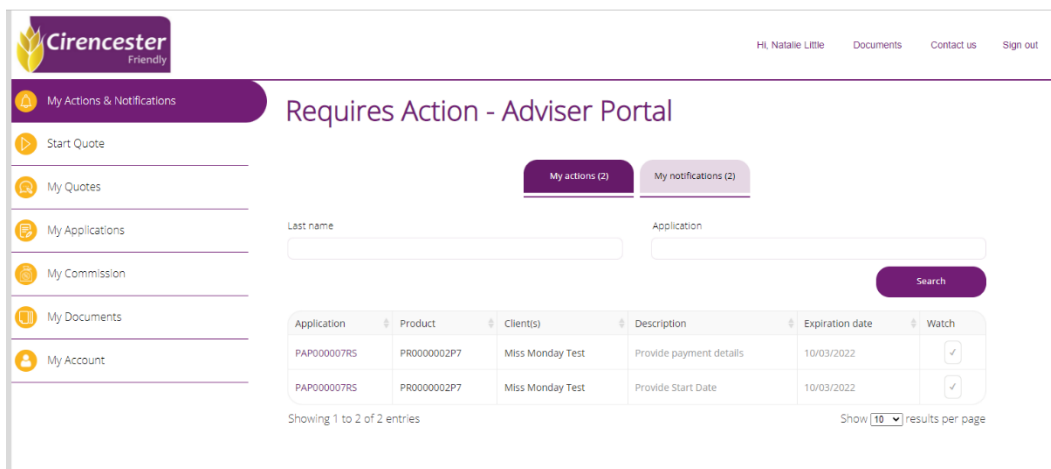


Viewing application updates/notifications

In the Adviser portal, you will be able to see updates in the 'My Actions & Notifications' tab. On the home page, the actions tab will be at the top of the list on the left-hand side. Once you have clicked on this heading, you will be taken to the showing the 2 tabs 'My Actions' and 'My Notifications'.

My actions – will list anything that that you (as an Adviser) will need to action on an application (ie provide GP details, provide bank details and provide a start date).

- If you are looking for an action for a particular application, you will be able to search via the last name of the Applicant or the application reference.



Requires Action - Adviser Portal

My actions (2) My notifications (2)

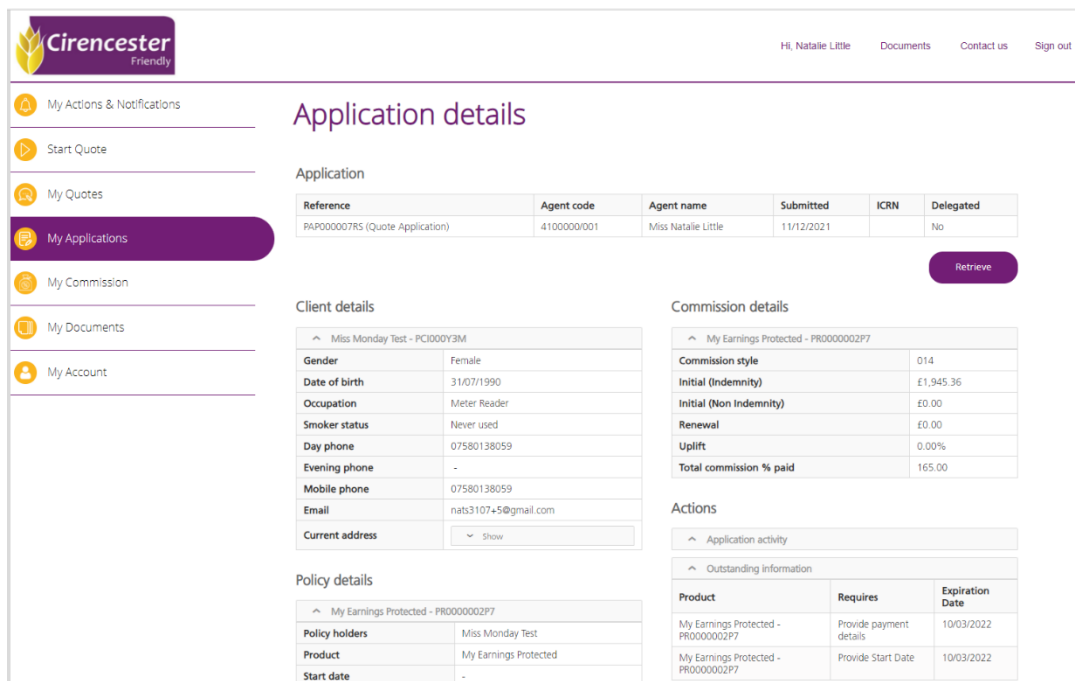
Last name Application

Search

Application	Product	Client(s)	Description	Expiration date	Watch
PAP000007RS	PR0000002P7	Miss Monday Test	Provide payment details	10/03/2022	<input checked="" type="checkbox"/>
PAP000007RS	PR0000002P7	Miss Monday Test	Provide Start Date	10/03/2022	<input checked="" type="checkbox"/>

Showing 1 to 2 of 2 entries Show 10 results per page

- You can click on the application reference and this will take you to the application details screen where you can retrieve the application.



Application details

Application

Reference	Agent code	Agent name	Submitted	ICRN	Delegated
PAP000007RS (Quote Application)	4100000/001	Miss Natalie Little	11/12/2021		No

Retrieve

Client details

Miss Monday Test - PCI000Y3M

Gender	Female
Date of birth	31/07/1990
Occupation	Meter Reader
Smoker status	Never used
Day phone	07580138059
Evening phone	-
Mobile phone	07580138059
Email	nats3107+S@gmail.com
Current address	Show

Commission details

My Earnings Protected - PR0000002P7

Commission style	014
Initial (Indemnity)	£1,945.36
Initial (Non Indemnity)	£0.00
Renewal	£0.00
Uplift	0.00%
Total commission % paid	165.00

Actions

Application activity

Outstanding information

Product	Requires	Expiration Date
My Earnings Protected - PR0000002P7	Provide payment details	10/03/2022
My Earnings Protected - PR0000002P7	Provide Start Date	10/03/2022

Policy details

My Earnings Protected - PR0000002P7

Policy holders	Miss Monday Test
Product	My Earnings Protected
Start date	-

- Upon retrieving the application, you will be taken through the Direct Debit Details (you will be able to enter bank details if not already completed) then the Identity & Verification checks and start date screen.

My Notifications – will show anything that’s been updated on the application (ie a decision being made or further information being requested via the applicant/being received).

- You will be able to search via the Applicants last name, application reference. You will also be able to search by the drop-down lists for the reference type and description (ie showing all applications that are in Underwriting and/or the applications that are waiting for AMRA’s to be returned).

- If an application has had a decision made, this will also show in the 'my notification' tab.
- The description will show the decision (ie underwriting declined). If you click on the reference in the notification tab, this will take you to the application details screen in the 'my application section'. This also shows decline under policy details and under actions.