

Self-Service Menu

TOPIC	WHAT CAN YOU FIND?	WHAT ARE THE BENEFITS?
<p>Access To Track & Manage Your Pipeline</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ Log in to our fantastic system, OLP Connect (OLPC), where you will find everything you need to track & manage your customers cover 	<ul style="list-style-type: none"> ✓ An application summary page which gives you all the useful information you need in one place ✓ A detailed progress bar which tells you what stage each product is at
<p>Decisions</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can find the decision and the reason for our decision if we are able to share this with you ➤ Your customer can find this information in My Account 	<ul style="list-style-type: none"> ✓ Ability to obtain this online 24 hours a day, 7 days a week ✓ Saves you time calling, allowing you to focus on protecting more customers
<p>Tracking Outstanding Evidence</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can view what information we require to underwrite an application online ➤ You can see what action we have taken to obtain evidence & key dates issued / chased & received 	<ul style="list-style-type: none"> ✓ Ability to obtain this online 24 hours a day, 7 days a week ✓ Keeps you informed ✓ Helps you manage conversations with your customer
<p>Amend</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You have the ability to amend the following information: <ul style="list-style-type: none"> ➤ Customer name, address and gender ➤ GP details ➤ Add products to make changes to type of cover / cover amounts / term / quote 	<ul style="list-style-type: none"> ✓ Ability to complete these actions online 24 hours a day, 7 days a week ✓ No need to call to request amendments ✓ Updates will be automatically assessed where possible
<p>Existing Business Support</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can provide your customer with extra support once their policy is on risk ➤ You can view and manage existing policies ➤ You can monitor lapses and cancellations 	<ul style="list-style-type: none"> ✓ Customers can access our most frequently asked questions & answers to enable them to self-serve ✓ Gives you the information you need in order to retain your business

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Self-Service Menu

TOPIC	WHAT CAN YOU FIND?	WHAT ARE THE BENEFITS?
<p>Providing Further Medical Information</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can amend medical disclosures online via OLPC ➤ You can see straight away if this changes the terms offered 	<ul style="list-style-type: none"> ✓ Updating online can reduce the need for us to issue out for evidence ✓ Ability to provide this online 24 hours a day, 7 days a week ✓ Our system will attempt to automatically underwrite
<p>Starting a Policy</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can start a policy yourself online ➤ Your customer can start their policy online in My Account 	<ul style="list-style-type: none"> ✓ Ability to provide start dates / start policies online 24 hours a day, 7 days a week ✓ Gives you full control
<p>NTU & Reinstatements</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You have the ability to NTU applications ➤ You have the ability to reinstate applications 	<ul style="list-style-type: none"> ✓ Ability to complete these actions online 24 hours a day, 7 days a week ✓ Gives you autonomy to manage your own pipeline
<p>Control How / When We Contact You</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can choose what information we send to you & your customers such as: <ul style="list-style-type: none"> ➤ Offer Letters ➤ UW Decision Emails ➤ Lapse Notifications ➤ Chaser Emails 	<ul style="list-style-type: none"> ✓ Never miss out on an update ✓ Full visibility of what we send to your customer ✓ Can be updated on a case by case basis
<p>Obtaining Policy Documents</p> <p>Click here for more information</p>	<ul style="list-style-type: none"> ➤ You can view policy documents online ➤ Your customers can view their documents via My Account 	<ul style="list-style-type: none"> ✓ Ability to view this information online 24 hours a day, 7 days a week ✓ Saves you time calling for this information ✓ No need to wait for postal documents to arrive

Your Simplified Overview Page- Step by Step Guide

You will land in the 'Application Summary' section

Click here to generate an email to your customer

The screenshot shows the 'Application Summary' page for application AN13798407, which is locked by user pcspd03. The page is in read-only mode. The left sidebar contains navigation options like 'Application Management', 'Workbench', and 'Updates'. The main content area has tabs for 'Overview', 'Life Insurance', and 'Life with critical illness'. It displays a table of agents (LA1 and LA2), a table of products (Life Insurance and Life Insurance with Critical Illness Cover), a table of payments, and a table of advisers. Callouts point to various elements: the 'Application Summary' link in the sidebar, the 'Generate email' button, the 'Contact email' field, the 'Life Insurance' product link, the 'Payment Details [-]' link, the 'UW Decision' hyperlinks, and the 'Edit' link in the adviser table.

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	999999999999999	jest@email.com	No	Male
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	999999999999999	vest@email.com	No	Female

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms LA2: Standard Terms	£10.00
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms	£15.72
Total							£25.72

Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful Links
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View Policy Documents
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View Policy Documents

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PJ	1234567890	agent@email.com	Edit

Click on a product to find more details on additional product features and a trust indicator

Clicking the decision hyperlink will take you to the reason for our decision

Click on the Payment Details to open the payment information. This will be displayed once there is a live policy within the application

The 'previous collection' will show as NA until the first premium has been collected.

An easy way to update your contact preferences

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Your Progress Bar- Step by Step Guide

Application progress AN13782509 Application locked by: pcssd03

There are no special instructions.

Overview

Life Insurance

Click on a product tab across the top to find the progress bar. There will be multiple tabs for cases with multiple products

Policy #	Policy Number	Lives Assured	Amount of Cover	Type of Cover	Term	Trust	Premium	Start Date	UW Decision
1		LA1	£369,311.00	Level	10 years	No	£10.00 (subject to underwriting)	21/04/2020	LA1: Referred for Manual Underwriting

Policy 1

Life assured 1: Mr Test Case

We are assessing your application → We require more information → We are assessing information → We have made our decision → Policy is live → Post completion

Outstanding Evidence requested	Status	Request date	Exam date	Last chased	Next chase	Received on	Payment	Paid on
Patient Health Report	Issued	21/04/2020		21/04/2020	12/05/2020		Pended	

Useful things to know about the progress bar

1. There will be a progress bar for each product, as well as split by each life

2. As the application moves through each stage the bar will turn from grey to green

3. The relevant stage the customer is at will be flagged as amber

4. We have added a 'Post Completion' stage to give visibility of changes to live policies

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Track & Manage Pipeline Menu

- You have access to the Overview Page which provides you with customer, product and adviser information in one place
- Your progress bar gives you an easy to understand view of exactly where in the journey your customer is
- You can view more information about this by using the below links to our Videos and Step by Step Guides

Video Link:

Click the following link to watch our **1 minute video** on the Overview Page <https://www.legalandgeneral.com/adviser/protection/doing-business-with-us/agent-hub/introducing-our-simplified-overview-page.html>

Video Link

Click the following link to watch our **1 minute video** on the Progress Bar: <https://www.legalandgeneral.com/adviser/protection/doing-business-with-us/agent-hub/introducing-the-progress-bar--agent-hub.html>

Step By Step Guide:

You can [click here](#) to view **more information about the Overview Page.**

Step By Step Guide:

You can [click here](#) to view **more information about the Progress Bar.**

[Main Menu](#)



Decision Menu

- You can view what the decision is & the reason for a decision online via OLPC
- If we can't disclose this reason to you for data protection purposes you will also be able to see this online via OLPC
- You can set yourself up to receive an automated email when a decision is applied to your application via your agent preferences (*Please refer to 'Control How / When We Contact You' in the Main Menu*)

Viewing reasons for decisions is easy.

View our video which provides guidance on how you can view reasons for decisions. This guide also provides steps to follow

Video Link:

<https://www.legalandgeneral.com/adviser/protection/doing-business-with-us/agent-hub/it-s-decision-time-.html>

Step By Step Guide:

You can [click here](#) to view our Step by Step Guide on **how you can view a decision**

Common Reasons for Change to Decision:

You can [click here](#) to view how your customers lifestyle, occupation & residency can effect the decision we offer

[Main Menu](#)



Decision: View the Decision- Step by Step Guide

Overview		Life Insurance	Life with critical illness				
Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	9999999999999999	jest@email.com	No	Male
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	9999999999999999	vest@email.com	No	Female
Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms LA2: Standard Terms	£10.00
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms	£15.72
						Total	£25.72
Payment Details [+]							
Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences	
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PJ	1234567890	agent@email.com	Edit	

STEP 1

Click on any decision hyperlink. This will take you to the decision screens

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Decision: View the Decision- Step by Step Guide

Decision for 1 - Life Insurance for Miss Test Case

Non-standard

If changes are made to the application that impact the underwriting decision, Legal & General may need to ask you some further underwriting questions when you submit your application.

We've assessed the information provided and can offer cover but it is not what you applied for due to the information supplied.

ⓘ Please note the following changes to your cover

The premium has changed because of Miss Test Case's information.

The reason for our decision for Miss Test Case is based on the following information provided in your application:

- Build

Please click [underwriting explained \(opens in a new window\)](#) for information about how we assess applications. This includes common reasons why we can't always offer the cover applied for.

Amount of cover	Length of cover	Original monthly premium	New monthly premium
£133,324.00	15 years	£6.00	£11.26

[Policy Summary \(opens in a new window\)](#)

[Personal Quote \(opens in a new window\)](#)

[Policy Booklet \(opens in a new window\)](#)

Please select one of these options to continue:

Accept

Reject

Decide later

For more information on what happens next please refer to our [What Happens After You Apply \(opens in a new window\)](#) leaflet.

[Please click here to return back to the Application Summary Screen.](#)

[Copy Application \(opens in a new window\)](#)

A multi product discount of **£3.00 per month** has been applied to the Total Monthly Premium based on the number of products in the application.

If the number of products applied for change, the discount amount may also change.

Click here to navigate back to the Application Summary screen

↓ CONTINUE

STEP 2

Here you can find the reasons for our decision. If we cannot disclose this due to a further disclosure then we will also state that here

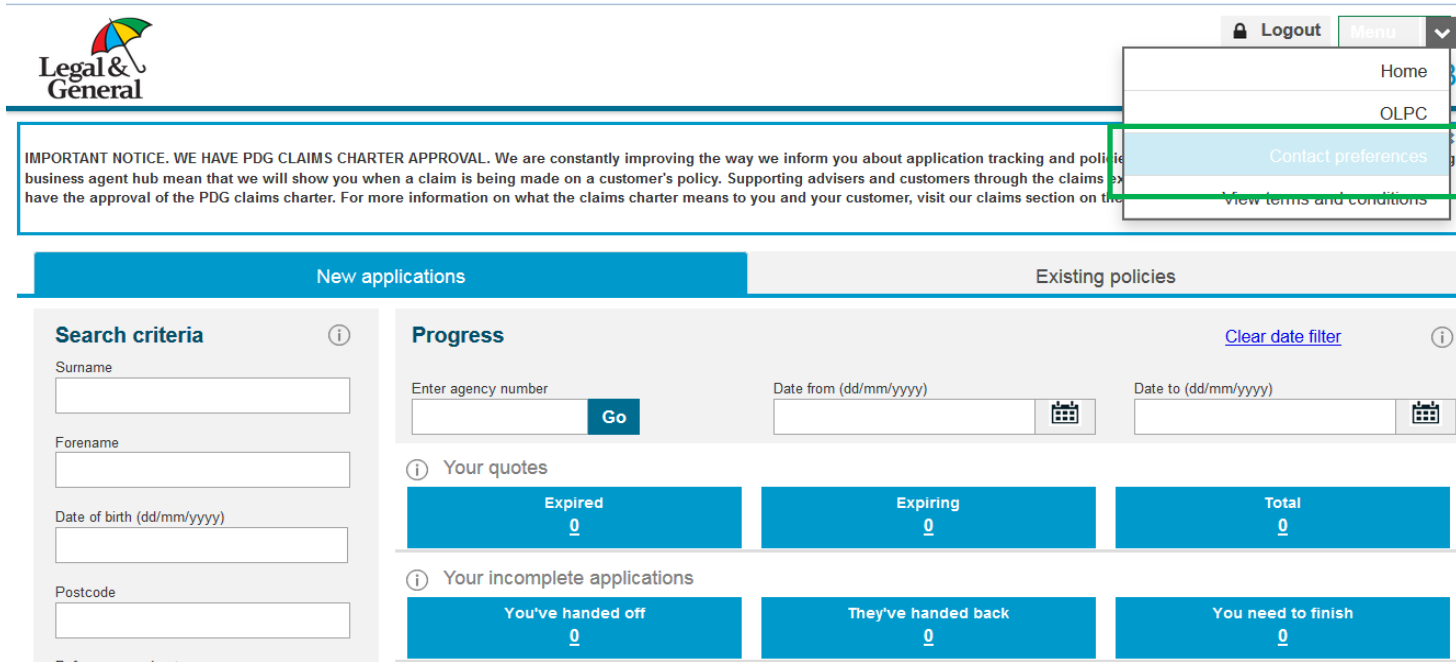
You can accept or decline the offer here, or choose to decide later.

*Note: Clicking continue until you reach the Product Summary page will take you to the relevant section where you can input a start date and validate bank details before placing the policy on risk.

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Decision: Automatic Email- Step by Step Guide



Legal & General

Logout Menu

Home

OLPC

Contact preferences

View terms and conditions

IMPORTANT NOTICE. WE HAVE PDG CLAIMS CHARTER APPROVAL. We are constantly improving the way we inform you about application tracking and policy... business agent hub mean that we will show you when a claim is being made on a customer's policy. Supporting advisers and customers through the claims ex... have the approval of the PDG claims charter. For more information on what the claims charter means to you and your customer, visit our claims section on the...

New applications Existing policies

Search criteria

Surname

Forename

Date of birth (dd/mm/yyyy)

Postcode

Progress [Clear date filter](#)

Enter agency number **Go** Date from (dd/mm/yyyy) Date to (dd/mm/yyyy)

Your quotes

Expired	Expiring	Total
0	0	0

Your incomplete applications

You've handed off	They've handed back	You need to finish
0	0	0

STEP 1

Select 'Contact Preferences' from your Menu bar in the top right hand side of your Agent Hub Landing Page

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Decision: Automatic Email- Step by Step Guide

STEP 2

Select 'Yes' on the 'Receive Emails on Underwriting Decisions' option

Note: Whilst you are here please make sure that the rest of your contact details & preferences are correct. If not you can update these here

Contact Details

Telephone Number (optional)

01273 000000

Mobile Phone No (optional)

07000000000

Fax No (optional)

Underwriting Basis: (optional)

Interactive Only

Optional Static

E-mail Address (optional)

test@landg.com

Repeat E-mail Address (optional)

test@landg.com

Administrator E-mail Address (optional)

Repeat Administrator Email Address (optional)

Additional Administrator E-mail Address (optional)

Receive emails on underwriting decisions?

Yes

No

Correspondence Preferences

	Client ?	Agent Correspondence Address/Email ?	Agent Registered Address/Email ?	Administrator Email ?
General Correspondence ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Letters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Original Policy Documents	<input checked="" type="checkbox"/>			<input type="checkbox"/>
Lapse Notification		<input checked="" type="checkbox"/>		<input type="checkbox"/>

Ok

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[Decision Menu](#)

NTU & Re-Instatement Menu

- You can mark an application as Not Taken Up online via OLPC
- Your customers can reject an offer themselves via their My Account
- You can check if an application has already been marked as Not Taken Up online via OLPC
- You can reinstate an application online via OLPC

Video Link:

Marking an application as Not Taken Up online is simple. You can watch our video on how you can do this yourself by clicking on the following link: <https://www.legalandgeneral.com/adviser/protection/business-development/webinars-workshops/>

Video Link:

You can watch our video on **how you can reinstate an application online** by clicking on the following link: <https://www.legalandgeneral.com/adviser/protection/business-development/webinars-workshops/>

Step by Step Guide:

You can [click here](#) to view our Step by Step Guide on **how you can mark an application as Not Taken Up**

Step by Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can reinstate an application online**

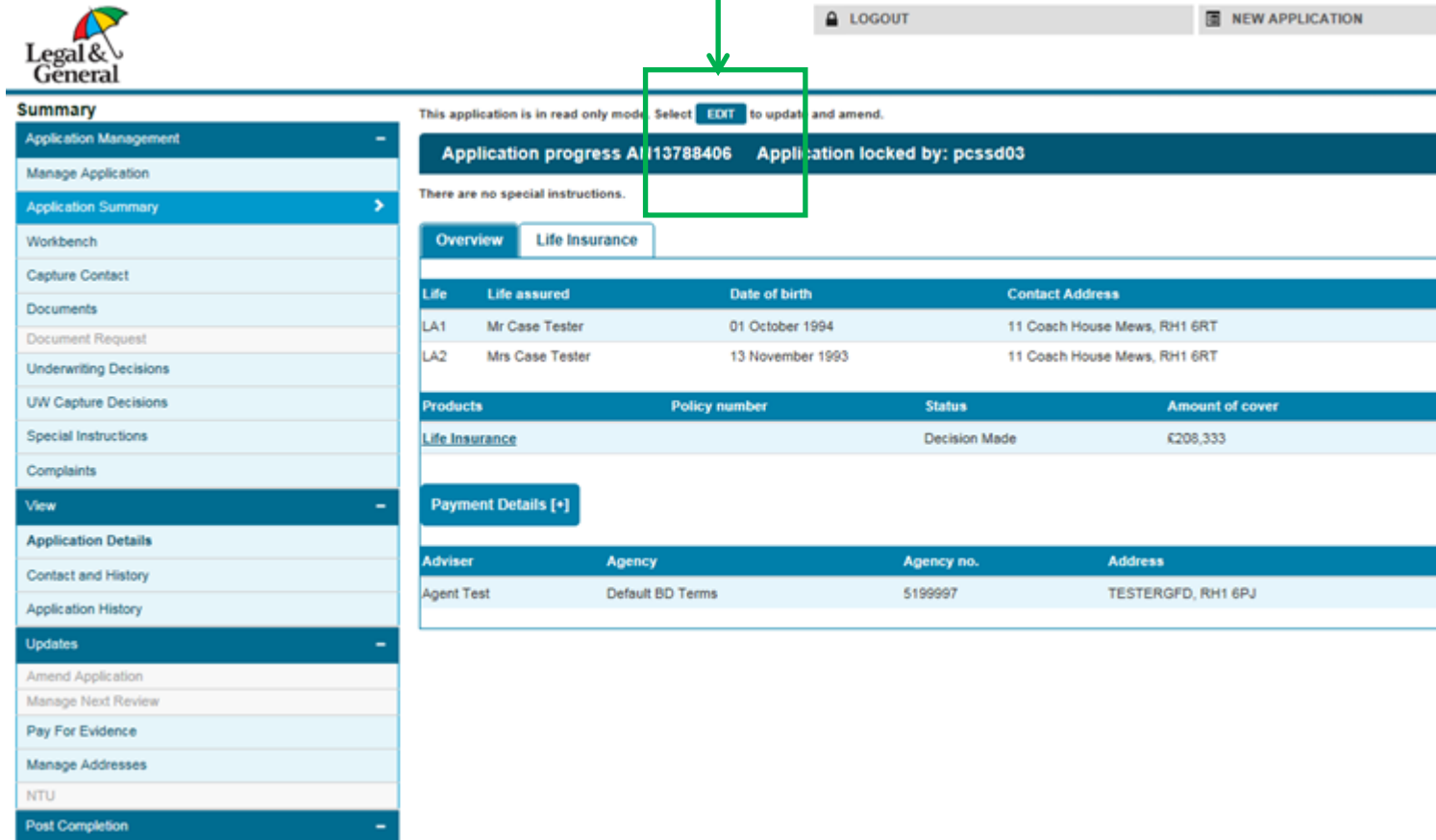
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NTU: How to NTU an Application- Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



Legal & General

LOGOUT NEW APPLICATION

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

Application progress All113789406 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance

Life	Life assured	Date of birth	Contact Address
LA1	Mr Case Tester	01 October 1994	11 Coach House Mews, RH1 6RT
LA2	Mrs Case Tester	13 November 1993	11 Coach House Mews, RH1 6RT

Products	Policy number	Status	Amount of cover
Life Insurance		Decision Made	£208,333

Payment Details [+]

Adviser	Agency	Agency no.	Address
Agent Test	Default BD Terms	5199997	TESTERGFD, RH1 6PJ

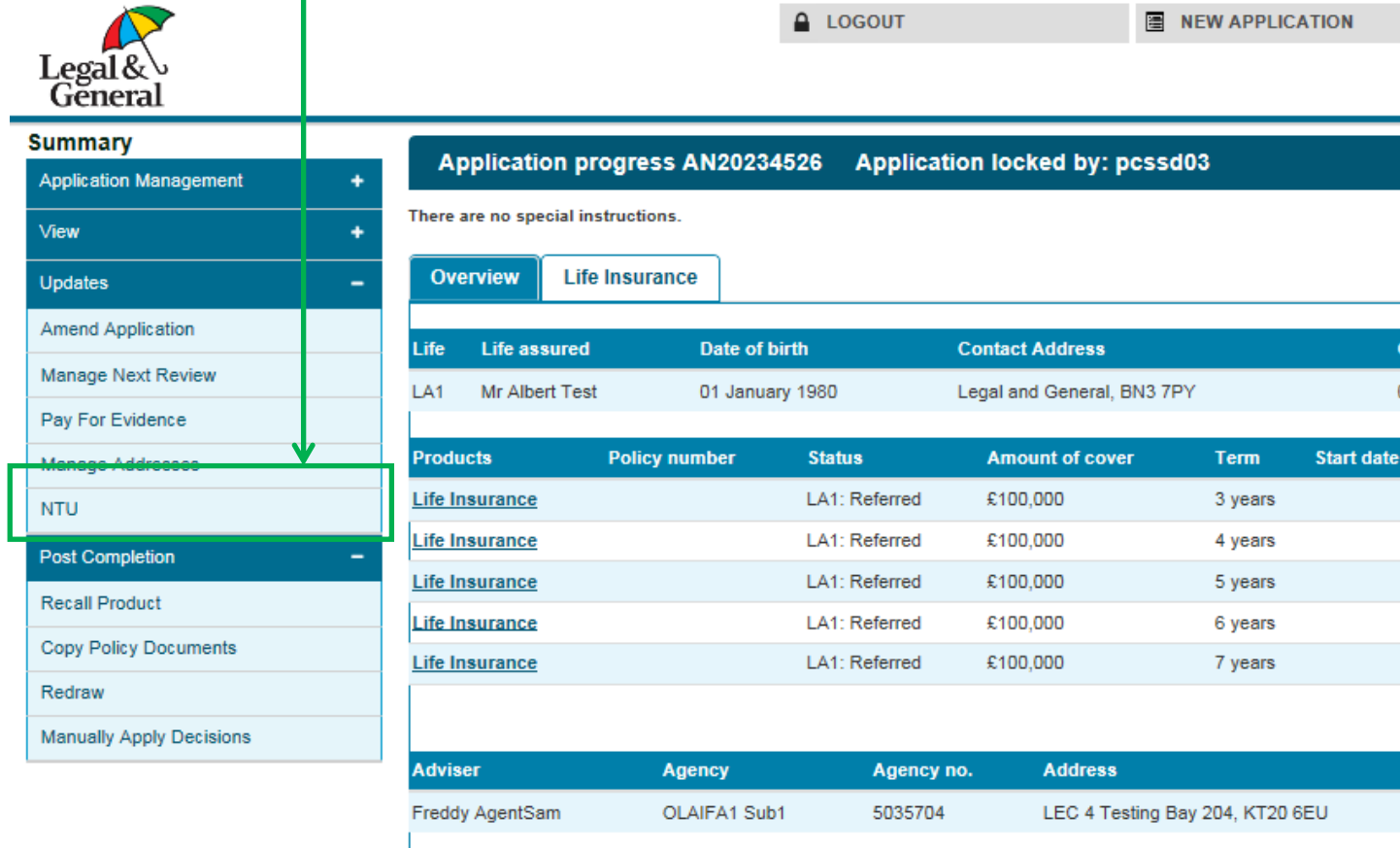
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NTU: How to NTU an Application- Step by Step Guide

STEP 2

Select 'NTU' down the left hand side menu bar



The screenshot displays the Legal & General application management interface. The left-hand menu is expanded, and the 'NTU' option is highlighted with a green box. A green arrow points from the text 'Select 'NTU' down the left hand side menu bar' to the 'NTU' option. The main content area shows the application progress for AN20234526, which is locked by pcssd03. The application is for Life Insurance. The summary table shows the following details:

Life	Life assured	Date of birth	Contact Address
LA1	Mr Albert Test	01 January 1980	Legal and General, BN3 7PY

The products table shows the following details:

Products	Policy number	Status	Amount of cover	Term	Start date
Life Insurance		LA1: Referred	£100,000	3 years	
Life Insurance		LA1: Referred	£100,000	4 years	
Life Insurance		LA1: Referred	£100,000	5 years	
Life Insurance		LA1: Referred	£100,000	6 years	
Life Insurance		LA1: Referred	£100,000	7 years	

The advisers table shows the following details:

Adviser	Agency	Agency no.	Address
Freddy AgentSam	OLAIFA1 Sub1	5035704	LEC 4 Testing Bay 204, KT20 6EU

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NTU: How to NTU an Application- Step by Step Guide

STEP 3

Select the appropriate reason for NTU from the drop down list

The screenshot shows the 'Legal & General' OLP Connect interface. At the top, there are navigation buttons: LOGOUT, NEW APPLICATION, NEXT TASK, and MENU. The main content area is titled 'NTU Application' and includes a sidebar with navigation options like 'Application Management', 'Document Request', and 'View'. The main panel shows application details for 'LA1: Mr Test Qudp' and 'LA2: Mrs Test:pre Ndnb'. A 'Reason' dropdown menu is set to 'Please select', and there is a checkbox for 'NTU Entire Application'. Below this is a 'Products' table with columns for Name, Product, and Select. The table lists two products: 'Mr Test Qudp' (1. Life) and 'Mrs Test:pre Ndnb' (2. Life). Each product has a checkbox in the 'Select' column. An 'Ok' button is located at the bottom right of the table area. Green arrows indicate the flow from the instruction box to the 'Reason' dropdown, then to the 'Select' checkboxes in the table, and finally to the 'Ok' button.

Name	Product	Select
Mr Test Qudp	1. Life	<input type="checkbox"/>
Mrs Test:pre Ndnb	2. Life	<input type="checkbox"/>

STEP 4

Select the relevant product/s you wish to mark as NTU & then select 'OK'

Note: If you select 'NTU Entire Application' under the drop down for 'Reason' you will not be able to re-instate this application at a later date

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NTU: How to NTU an Application- Step by Step Guide

STEP 5

Select 'OK' to confirm you are happy to proceed with NTU



Confirmation

Confirmation

Please confirm that you wish to NTU the following products:

1. Life
2. Life
3. Life
4. Life
5. Life

Cancel

Ok

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

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NTU: How to NTU an Application- Step by Step Guide

STEP 6

You will now be able to see that the product status updates, now showing as NTU



LOGOUT NEW APPLICATION NEXT TASK MENU

OLP Connect

Summary

This application is in read only mode. Select [EDIT](#) to update and comment.

Application progress AN20234526 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender
LA1	Mr Albert Test	01 January 1980	Legal and General, BN3 7PY	07777 123456	test@test.com	No	Male

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium
Life Insurance		LA1: NTU	£100,000	3 years		LA1: Further Evidence Required	£6.81
Life Insurance		LA1: NTU	£100,000	4 years		LA1: Further Evidence Required	£6.87
Life Insurance		LA1: NTU	£100,000	5 years		LA1: Further Evidence Required	£6.93
Life Insurance		LA1: NTU	£100,000	6 years		LA1: Further Evidence Required	£7.07
Life Insurance		LA1: NTU	£100,000	7 years		LA1: Further Evidence Required	£7.21
						Total	£0.00

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences
Freddy AgentSam	OLAIFA1 Sub1	5035704	LEC 4 Testing Bay 204, KT20 6EU	02084454444	test@test.com	Edit

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[NTU & Reinstatement Menu](#)



NTU: How to Reinstate an Application- Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



LOGOUT NEW APPLICATION NEXT TASK MENU

- Application Management
- Manage Application
- Application Summary
- Workbench
- Capture Contact
- Documents
- Document Request
- Underwriting Decisions
- UW Capture Decisions
- Special Instructions
- Complaints
- View
- Application Details
- Contact and History
- Application History
- Updates
- Amend Application
- Manage Next Review
- Pay For Evidence
- Manage Addresses
- Re-instate Application

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

Application progress / N13805923 Application locked by: pcssd03

There are no special instructions.

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Sm
LA1	Mr Test Case	10 December 1990	Legal & General Assurance Society L, BN3 7PY	01234567890	test@landg.com	No
Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance		LA1: NTU	£637,903	20 years		LA1: Standard Terms
Total						
Adviser	Agency	Agency no.	Address	Phone	Email	Contact prefer
Test Adviser	A S General Insurance Brokers Plc	5035704	internal			Edit

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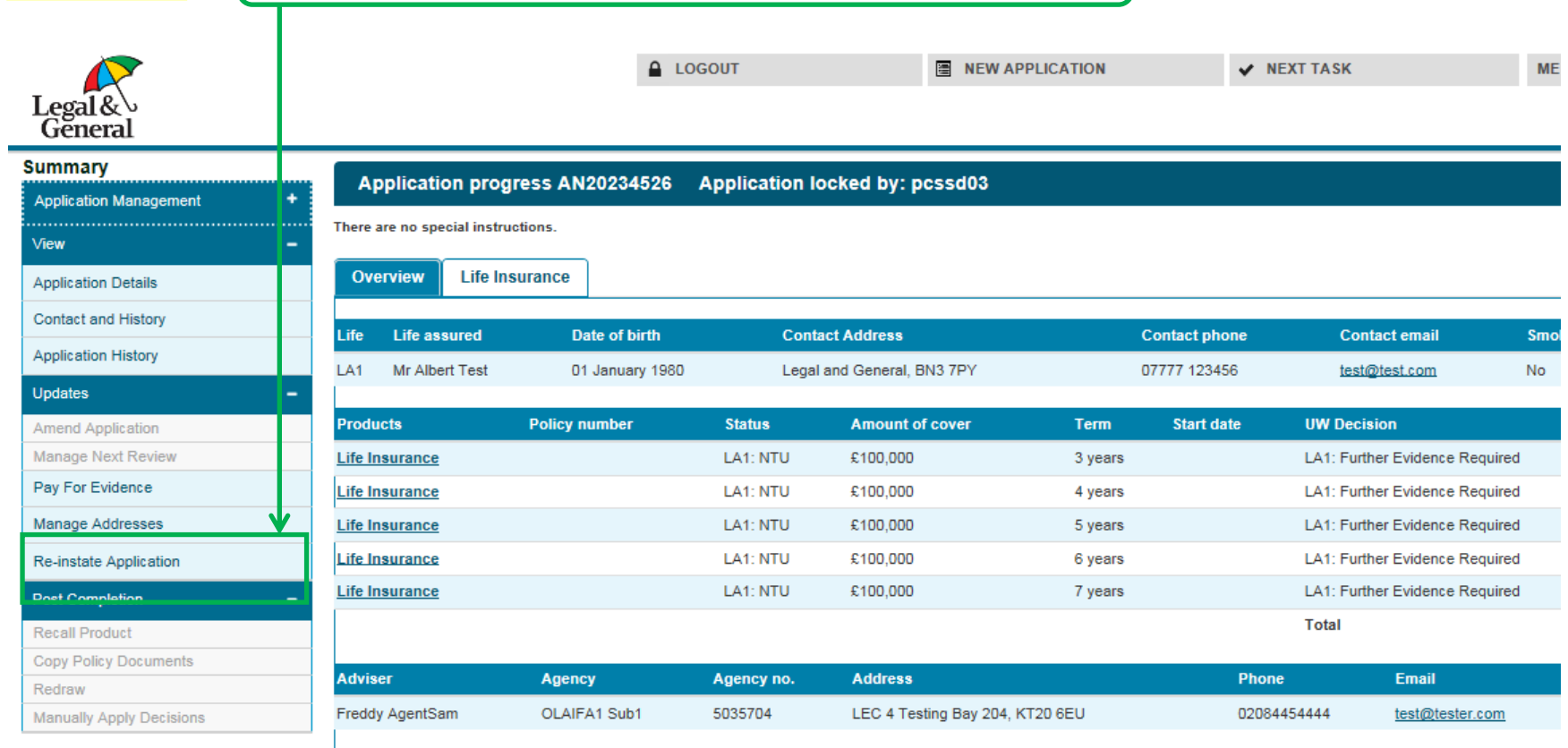
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NTU: How to Reinstate an Application- Step by Step Guide

STEP 2

Select 'Reinstate Application' down the left hand side menu bar



The screenshot displays the Legal & General application management interface. At the top left is the Legal & General logo. The top navigation bar includes 'LOGOUT', 'NEW APPLICATION', 'NEXT TASK', and 'ME'. The main content area is titled 'Application progress AN20234526' and 'Application locked by: pcssd03'. Below this, there are tabs for 'Overview' and 'Life Insurance'. A table lists application details including 'Life assured', 'Date of birth', 'Contact Address', 'Contact phone', and 'Contact email'. Another table lists 'Products' with columns for 'Policy number', 'Status', 'Amount of cover', 'Term', 'Start date', and 'UW Decision'. A final table lists 'Adviser' information including 'Agency', 'Agency no.', 'Address', 'Phone', and 'Email'. The left-hand menu is expanded, and the 'Re-instate Application' option is highlighted with a green box and a green arrow pointing to it from the 'STEP 2' instruction.

Summary

Application Management +

View -

Application Details

Contact and History

Application History

Updates -

Amend Application

Manage Next Review

Pay For Evidence

Manage Addresses

Re-instate Application

Post Completion -

Recall Product

Copy Policy Documents

Redraw

Manually Apply Decisions

Application progress AN20234526 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoking
LA1	Mr Albert Test	01 January 1980	Legal and General, BN3 7PY	07777 123456	test@test.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance		LA1: NTU	£100,000	3 years		LA1: Further Evidence Required
Life Insurance		LA1: NTU	£100,000	4 years		LA1: Further Evidence Required
Life Insurance		LA1: NTU	£100,000	5 years		LA1: Further Evidence Required
Life Insurance		LA1: NTU	£100,000	6 years		LA1: Further Evidence Required
Life Insurance		LA1: NTU	£100,000	7 years		LA1: Further Evidence Required
Total						

Adviser	Agency	Agency no.	Address	Phone	Email
Freddy AgentSam	OLAIFA1 Sub1	5035704	LEC 4 Testing Bay 204, KT20 6EU	02084454444	test@tester.com

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NTU: How to Reinstatement an Application- Step by Step Guide

STEP 3

Select the appropriate reason for reinstatement from the drop down list & then 'OK'



LOGOUT

MENU



OLP Connect

Reinstatement Application

Application Management

Manage Application

Application Summary

Documents

Print

View

Application Details

Contact and History

Application History

Updates

Amend Application

Manage Addresses

Re-instate Application

Reinstatement Application

To re-instate this application:

- please select a reason for reinstatement and press Ok
- You will then be returned to the application where you will need to check that the application is correct and then re-submit the application

Reason for NTU: Change in client circumstances

Reason for reinstatement

Please select

OK

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NTU: How to Reinstatement an Application- Step by Step Guide

STEP 4

From the Quote Results page you can view your clients quote. Note: If the quote has expired you can 're-quote' this here before proceeding

Quote Results

Total monthly Premiums for selected products - £10.00 per month

Products for Mr A Example

1. Life Insurance	Edit product	
£72,405.00	10 years	£10.00 per month

[RE-QUOTE ALL](#)

[EMAIL QUOTE TO CUSTOMER](#)

Send the quote as a document to the client.

To proceed with this application choose the underwriting method you wish to use.

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NTU: How to Reinstatement an Application- Step by Step Guide

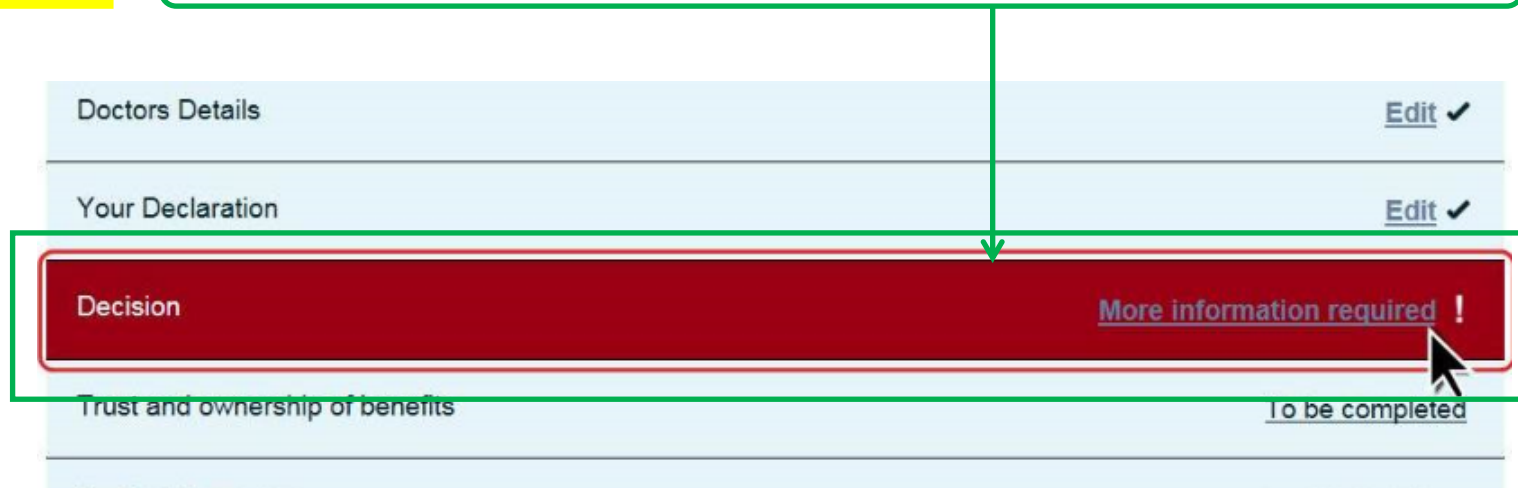
STEP 5

Scroll down to the 'Application' tab. Anything highlighted in red is an outstanding action required before the application can be reinstated



STEP 6

Once you've completed any outstanding actions, scroll further down the page and click 'Decision'.



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NTU: How to Reinstatement an Application- Step by Step Guide

STEP 7

Scroll down and click 'Product Summary'

↓ CONTINUE

Trust and ownership of benefits [Edit](#) ✓

Product Summary [Edit](#) ✓

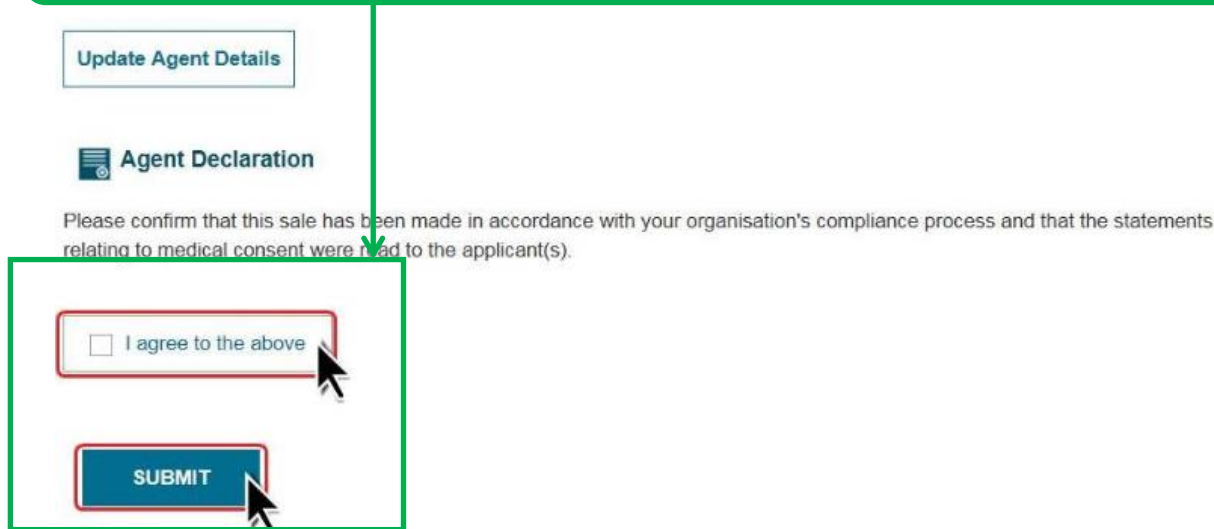
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NTU: How to Reinstate an Application- Step by Step Guide

STEP 8

Ensure that the product summary is correct and click 'I agree to the above' under the 'Agent Declaration' heading. Click 'Submit'



Update Agent Details

Agent Declaration

Please confirm that this sale has been made in accordance with your organisation's compliance process and that the statements relating to medical consent were read to the applicant(s).

I agree to the above

SUBMIT

STEP 9

You will see a confirmation message stating that your reinstatement request has been received and that our underwriters will now re-assess the application. Please note that a (Declaration of Health DOH) or further information may be required to reinstate an application

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[NTU & Reinstatement Menu](#)



Amends Menu

- You can amend your customers personal details , product details, GP Details or medical details online via OLPC
- Your customers can amend their personal details via MyAccount
- You can re-quote an application online via OLPC

Video Link:

You can view our videos on **how to change an address & how to add a product** by clicking on the following link: :
<https://www.legalandgeneral.com/adviser/protection/business-development/webinars-workshops/>

Step By Step Guide:

You can [click here](#) to view our Step by Step Guide on **how you can make an amendment to the product details via OLPC**

Step By Step Guide:

You can [click here](#) to view our Step by Step Guide on **how you can make amendments to the customers personal details via OLPC**

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can make amendments to the customers contact details or the customers GP details via OLPC**

[Main Menu](#)



Amends- Changing a Name/DOB/Gender- Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



LOGOUT NEW APPLICATION NEXT TASK MENU

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

Application progress AN13798407 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	9999999999999999	jest@email.com	No
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	9999999999999999	vest@email.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms LA2: Standard Terms
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms
Total						

Payment Details [-]

Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View

Adviser	Agency	Agency no.	Address	Phone	Email	Contact prefer
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PU	1234567890	agent@email.com	Edit

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Amends- Changing a Name/DOB/Gender- Step by Step Guide

STEP 2

Select 'Amend Application' down the left hand side menu



LOGOUT NEW APPLICATION NEXT TASK MENU

OLP Co

Summary
Application Management +
View +
Updates -
Amend Application
Manage Next Review
Pay For Evidence
Manage Addresses
NTU
Post Completion -
Recall Product
Copy Policy Documents
Redraw
Manually Apply Decisions

Application progress AN20237585 Application locked by: pcssd03								
There are no special instructions.								
Overview		Life Insurance		Life with critical illness				
Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status		
LA1	Mr Flem Tes	08 May 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No		
LA2	Mrs Flemmie Test	05 December 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No		
Products			Policy number	Status	Amount of cover	Term	Start date	UW Decision
<u>Life Insurance</u>			0130950082	LA1: Live	£237,651	5 years	16/11/2019	LA1: Standard Terms - Under Review
<u>Mortgage Decreasing Life Insurance with Critical Illness Cover</u>			0130950090	LA2: Live	£80,998	5 years	16/11/2019	LA2: Standard Terms - Under Review
Total								
Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences		
Umma Fof3anji	IFA Quotes	5199997	37 Barrow Road, CR0 4EZ	0986754321	hemraj.jain@landg.com	Edit		

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Amends- Changing a Name/DOB/Gender- Step by Step Guide

STEP 3

Scroll to the top of the page & select the 'Basic Details' page

Application Reference : AN2023/585

Basic Details	Edit ✓
Product Selection	Edit ✓
Product Details	Edit ✓
Occupation	Edit ✓
Administration	Edit ✓
Quote Results	

[Previous page](#)

[Next page](#)


Amends- Changing a Name/DOB/Gender- Step by Step Guide

STEP 4

You can then amend the Name/DOB/Gender here

Agent Details - 5199997

Your Reference (optional) [?](#)

 **Flem Tes**

Title

Mr

Forename

Flem

Surname

Tes

Gender

Male Female

Date of Birth

08/05/1987

During the last 12 months have you smoked any cigarettes, cigars, a pipe or used nicotine replacements? [?](#)

None at all

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Amends- Changing a Name/DOB/Gender- Step by Step Guide

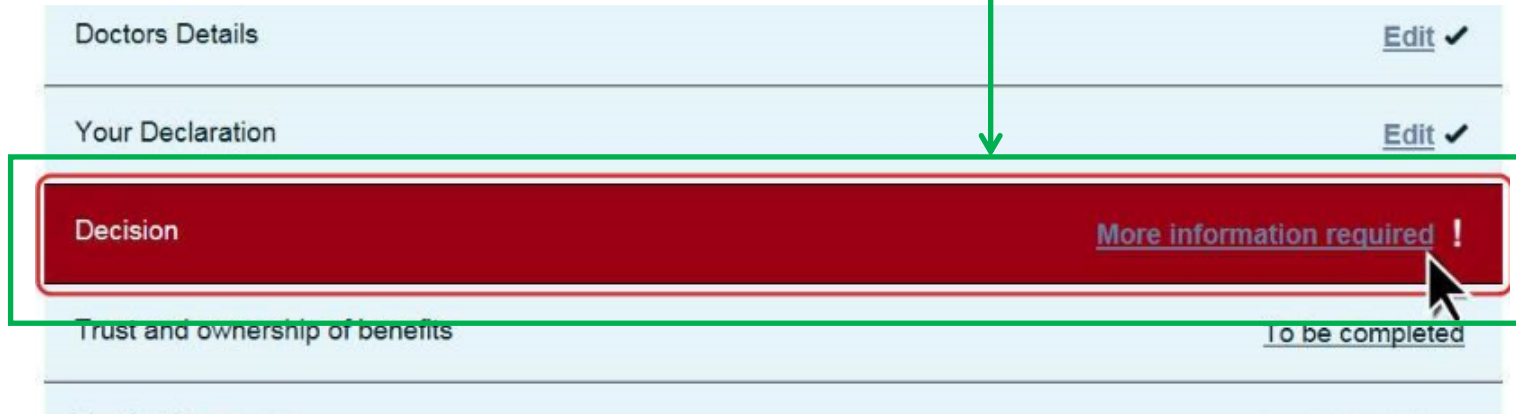
STEP 5

Scroll down to the 'Application' tab. Anything highlighted in red is an outstanding action required before the application can be amended



STEP 6

Once you've completed any outstanding actions, scroll further down the page and click 'Decision'



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Amends- Changing a Name/DOB/Gender- Step by Step Guide

STEP 7

Scroll down and click 'Product Summary'

A screenshot of a web interface showing a list of items under the heading "Trust and ownership of benefits". The items are "Trust and ownership of benefits" and "Product Summary". Each item has an "Edit" link with a checkmark icon to its right. A blue button labeled "CONTINUE" with a downward arrow is located at the top right. A green box highlights the "Product Summary" item, and a red box highlights the "Edit" link next to it. A mouse cursor is pointing at the "Edit" link. A green arrow points from the instruction box above to the "Product Summary" item.

STEP 8

Ensure that the product summary is correct and click 'I agree to the above' under the 'Agent Declaration' heading. Click 'Submit'

A screenshot of a web interface showing the "Agent Declaration" section. At the top left is a button labeled "Update Agent Details". Below it is the heading "Agent Declaration" with a list icon. Underneath is a paragraph of text: "Please confirm that this sale has been made in accordance with your organisation's compliance process and that the statements relating to medical consent were read to the applicant(s)". Below the text is a checkbox labeled "I agree to the above" and a blue button labeled "SUBMIT". A green box highlights the "I agree to the above" checkbox and the "SUBMIT" button. A red box highlights the "I agree to the above" checkbox. A mouse cursor is pointing at the checkbox. A green arrow points from the instruction box above to the "I agree to the above" checkbox.

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[Amends Menu](#)

Amends- Changing a Product Details- Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



LOGOUT NEW APPLICATION NEXT TASK MENU

Summary

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

Application progress A V13798407 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	999999999999999	jest@email.com	No
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	999999999999999	vest@email.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms LA2: Standard Terms
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms
Total						

Payment Details [-]

Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View I
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View I

Adviser	Agency	Agency no.	Address	Phone	Email	Contact prefer
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PJ	1234567890	agent@email.com	Edit

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Amends- Changing a Product Details- Step by Step Guide

STEP 2

Select 'Amend Application' down the left hand side menu

Legal & General OLP Co

LOGOUT NEW APPLICATION NEXT TASK MENU

Summary

Application Management +

View +

Updates -

Amend Application

Manage Next Review

Pay For Evidence

Manage Addresses

NTU

Post Completion -

Recall Product

Copy Policy Documents

Redraw

Manually Apply Decisions

Application progress AN20237585 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Flem Tes	08 May 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No
LA2	Mrs Flemma Test	05 December 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance	0130950082	LA1: Live	£237,651	5 years	16/11/2019	LA1: Standard Terms - Under Review
Mortgage Decreasing Life Insurance with Critical Illness Cover	0130950090	LA2: Live	£80,998	5 years	16/11/2019	LA2: Standard Terms - Under Review
Total						

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences
Umma Fof3anji	IFA Quotes	5199997	37 Barrow Road, CR0 4EZ	0986754321	hemraj.jain@landg.com	Edit

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Amends- Changing a Product Details- Step by Step Guide

STEP 3

To amend the product details you can click on 'EDIT Product' here

Quote Results

A multi product discount of £2.00 per month has been applied to the Total Monthly Premium based on the number of products that have been quoted.

If the number of products within the quote change, the discount amount may also change.

Total monthly Premiums for selected products - £20.00 per month

Jump to [Decision](#) screen

☰ Products for Flem Tes

1. Life Insurance [Edit product](#)

£237,651.00

5 years

£10.00 per month

Quote and Documents to View or Download



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Amends- Changing a Product Details- Step by Step Guide

STEP 4

You can then 'EDIT' your product here

3. Life Insurance - Mr Flem Tes

Life Insurance

Amount of cover (optional) <input type="text" value="£237,651.00"/> or	Premium (optional) <input type="text"/>	Agent quoted premium (optional) <input type="text"/>
Length of cover <input type="text" value="5"/> years	Premium frequency <input checked="" type="radio"/> Monthly <input type="radio"/> Annual	
Waiver of Premium <input type="text" value="No"/> ▼	Start date (optional) <input type="text" value="Specific Start Date"/> ▼	Specific start date (optional) <input type="text" value="16/11/2019"/>
Critical illness cover		
<input type="radio"/> Critical Illness Cover	<input type="radio"/> Critical Illness Extra	<input checked="" type="radio"/> None
Combination mismatch (optional) <input type="text" value="Please select"/> ▼		

↓ CONTINUE

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Amends- Changing a Product Details- Step by Step Guide

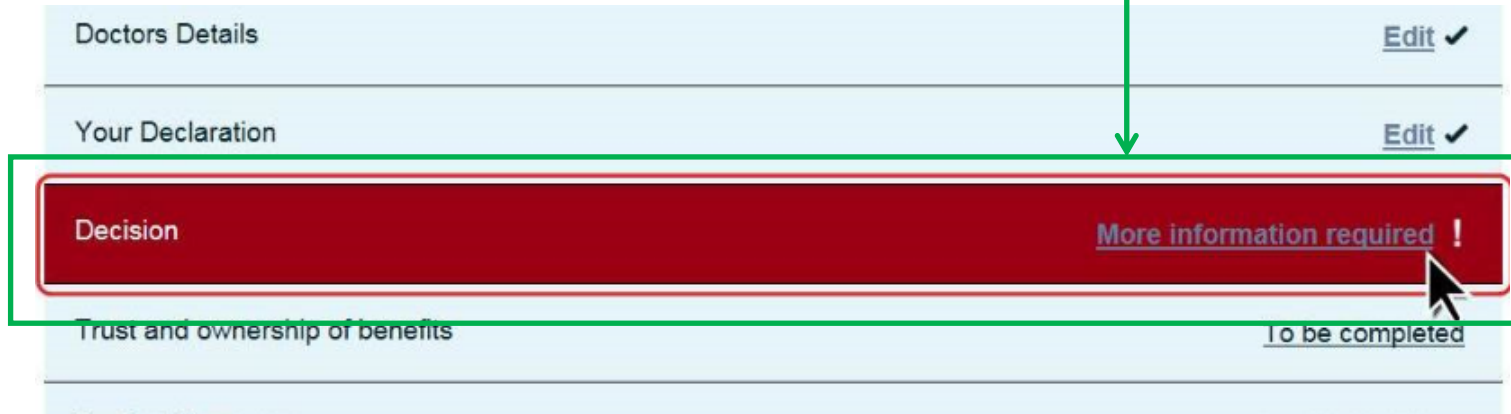
STEP 5

Scroll down to the 'Application' tab. Anything highlighted in red is an outstanding action required before the application can be amended



STEP 6

Once you've completed any outstanding actions, scroll further down the page and click 'Decision'



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Amends- Changing a Product Details- Step by Step Guide

STEP 7

Scroll down and click 'Product Summary'

A screenshot of a web interface showing a list of items. At the top right is a blue button with a downward arrow and the text 'CONTINUE'. Below it are two items: 'Trust and ownership of benefits' and 'Product Summary'. Each item has an 'Edit' link with a checkmark to its right. A red box highlights the 'Product Summary' item, and a mouse cursor is pointing at the 'Edit' link. A green arrow points from the instruction above to the 'Product Summary' item.

STEP 8

Ensure that the product summary is correct and click 'I agree to the above' under the 'Agent Declaration' heading. Click 'Submit'

A screenshot of a web interface showing the 'Agent Declaration' section. At the top left is a button labeled 'Update Agent Details'. Below it is a heading 'Agent Declaration' with a list icon. Underneath is a paragraph of text: 'Please confirm that this sale has been made in accordance with your organisation's compliance process and that the statements relating to medical consent were read to the applicant(s)'. Below the text is a checkbox labeled 'I agree to the above' and a blue button labeled 'SUBMIT'. A red box highlights the checkbox and the 'SUBMIT' button, and a mouse cursor is pointing at each. A green arrow points from the instruction above to the checkbox.

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[Amends Menu](#)

Amends- Changing GP Details & Customer Contact Details- Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



LOGOUT NEW APPLICATION NEXT TASK MENU

Summary

- Application Management -
- Manage Application
- Application Summary >
- Workbench
- Capture Contact
- Documents
- Document Request
- Underwriting Decisions
- UW Capture Decisions
- Special Instructions
- Complaints
- View -
- Application Details
- Contact and History
- Application History
- Updates -
- Amend Application
- Manage Next Review
- Pay For Evidence
- Manage Addresses
- NTU
- Post Completion -

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

Application progress AN1: 798407 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	9999999999999999	jest@email.com	No
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	9999999999999999	vest@email.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
<u>Life Insurance</u>	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms
						LA2: Standard Terms
<u>Life Insurance with Critical Illness Cover</u>		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms
Total						

Payment Details [-]

Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View I
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View I

Adviser	Agency	Agency no.	Address	Phone	Email	Contact prefer
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PU	1234567890	agent@email.com	Edit

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Amends- Changing GP Details & Customer Contact Details- Step by Step Guide

STEP 2

Select 'Manage Addresses' down the left hand side menu bar



LOGOUT

NEW APPLICATION

NEXT TASK

MENU

Summary

- Application Management -
- Manage Application
- Application Summary >
- Workbench
- Capture Contact
- Documents
- Document Request +
- Underwriting Decisions
- UW Capture Decisions
- Special Instructions
- Complaints
- View +
- Updates -
- Amend Application
- Manage Next Review
- Pay For Evidence
- Manage Addresses
- NTU
- Post Completion +

Application progress AN20237585 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Flem Tes	08 May 1987	81a Brighton Road, RH1 6PS	0123456789	privanka.mk@landg.com	No
LA2	Mrs Fiemmie Test	05 December 1987	81a Brighton Road, RH1 6PS	0123456789	privanka.mk@landg.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance	0130950082	LA1: Live	£237,651	5 years	16/11/2019	LA1: Standard Terms - Under Review
Mortgage Decreasing Life Insurance with Critical Illness Cover	0130950090	LA2: Live	£80,998	5 years	16/11/2019	LA2: Standard Terms - Under Review
Total						

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preference
Umma Fof3anji	IFA Quotes	5199997	37 Barrow Road, CR0 4EZ	0986754321	hemraj.jain@landg.com	Edit

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Amends- Changing GP Details & Customer Contact Details- Step by Step Guide

STEP 3

You can expand each of these sections to view the current address & contact details we hold for the customers & their GP's

AN20237585 Application locked by: possd03

Submitted: 24/03/2020 Expiry Date: 16/11/2020 Source: On-line

There are no special instructions.

Agent: Umma Fof3anji 5199997	+	Team: Default IFA Team	+
LA1: Mr Flem Tes			+
LA2: Mrs Flemmie Test			+
Life 1 Contact Address			+
Life 2 Contact Address			+
Life 1 Doctor's Details			+
Life 2 Doctor's Details			+
CNBS Ad-Hoc Contacts Group			+
CNBS Ad-Hoc Contact Address			+

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Amends- Changing GP Details & Customer Contact Details- Step by Step Guide

STEP 4

You can then amend any part of these details you require & press 'Update' at the bottom

Mr Fiem Tes

Is this address outside of England, Scotland, Wales or Northern Ireland?

Postcode (optional)
RH1 6PS

House No/Name and Street
81a Brighton Road

Find Address

Address Line 2
REDHILL

Address Line 3 (optional)

Address Line 4 (optional)

Invalid Contact Address - Mail has been returned from this address

Home Address

Is this address outside of England, Scotland, Wales or Northern Ireland?

Postcode (optional)
RH1 6PS

House No/Name and Street
81a Brighton Road

Find Address

Address Line 2
REDHILL

Address Line 3 (optional)

Address Line 4 (optional)

Invalid Home Address - Mail has been returned from this address

Contact Details

Work Phone No (optional)

Home Phone No (optional)

Mobile Phone No (optional)
0123456789

E-Mail Address (optional)
prityanka.mk@landg.com

Fax No (optional)

It may be necessary for us to contact you to discuss your application; this might include discussing matters of a sensitive nature. Are you happy for us to contact you in this event?

Yes No

Update

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[Amends Menu](#)

Policy Documents Menu

- For policies started after 2016 policy documents can be viewed online by both you & your customers
- Agents can view these on OLPC & Customers can view these within their My Account
- For policies started before 2016 copy documents can be re-sent if required but your customers can still view all details of their cover on their My Account

Obtaining Policy Documents is easy.

You and your customers can view these online. For more details on how to do this please see the below Step by Step Guides

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can view policy documents via The Agent Hub**

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can view policy documents via OLPC**

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how your customers can access policy documents**

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can view policy documents via the Application Summary Page in OLPC**

[Main Menu](#)



How to Obtain Policy Documents via Agent Hub- Step by Step Guide

STEP 1

You can instantly obtain your client's policy documents in Agent Hub during the first 14 months. Firstly you need to find the policy



Logout New application Menu

AGENTHUB

In progress applications

Existing policies

Search existing policies ⓘ

Surname

Date of birth (dd/mm/yyyy)

OR

Policy number

Search

Clear

Select 'Existing Policies' along the top of the page

Add policy details and press 'Search'

Useful links +

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How to Obtain Policy Documents via Agent Hub - Step by Step Guide

STEP 2



Existing Policy Details 0000000000

LOGOUT

← BACK

AGENTHUB

CONTACT DETAILS

Show more ▾

Life insured

Name	Address	Postcode	Date of Birth
Mr A Example	Example House, 1 Example Street, Example Town, Example County	AB12 3CD	01/01/1900

EVENT DETAILS - Cancelled from outset

Event created	Event status
---------------	--------------

Under the 'Product Details' section, click 'Show more'

NOTE HISTORY

Show more ▾

Date	User	Details
------	------	---------

PRODUCT DETAILS - Life Insurance with Critical Illness Cover

Show more ▾

Amount of Cover	Policy status	Policy start date	Policy end date	Monthly premium	Collection day
£19,448.00	InForce	19/07/2018	18/07/2028	£9.00	19

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How to Obtain Policy Documents via Agent Hub- Step by Step Guide

STEP 3

Under 'Policy documents', you can click to view your clients
'Personalised quote'
'Policy summary'
or 'Policy booklet'

PRODUCT DETAILS						Show less ^
Amount of Cover	InForce	19/07/2018	18/07/2028	£9.00	19	
Trust	Premium basis	Waiver	TIC	TPD	Original cover	
N	Guaranteed	No	Yes	Own occupation	£19,448.00	
Conversion option	2nd death					
No	No					
Policy documents						
Personalised quote	Policy summary	Policy booklet				
Benefit details						
Benefit	Benefit premium					
Children's Critical Illness Cover	£0.00					
Legal & General Nurse Support Services	£0.00					
Agent details						
Name	Agent	Master agent	Servicing agent			
Default BD Terms	0000000	0000000	0000000			
Life insured		Rating or exclusion				
Mr A Example		Exclusion - participation in aviation, gliding or any form of aerial flight other than as a fare paying passenger in an aircraft licensed to carry passengers and piloted by a pilot holding a commercial licence.				

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[Policy Documents Menu](#)



How to Obtain Policy Documents via OLPC - Step by Step Guide

STEP 1

You can instantly obtain your client's policy documents in Agent Hub during the first 14 months. First you need to find the policy

Legal & General

Logout Menu

AGENTHUB

New applications Existing policies

Search criteria

Surname

Forename

Date of birth (dd/mm/yyyy)

Postcode

Reference number type

Application Number

Reference number

AN13592331

Applications modified within the last

Life agent number

Application status

Outstanding information items

Search

Clear

Progress

Enter agency number

Go

Date from (dd/mm/yyyy)

Date to (dd/mm/yyyy)

Clear date filter

Expiring

Total

You've handed off

They've handed back

You need to finish

You can submit

We need information

We're assessing your applications

You need a decision

Declined/postponed

Reviewed

Issued

Live policies that you're amending

Select 'New Application' along the top of the page

Add policy details and press 'Search'

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How to Obtain Policy Documents via OLPC - Step by Step Guide

STEP 2

Select 'Quote Results'

Basic Details [Edit ✓](#)

Product Selection [Edit ✓](#)

Product Details [Edit ✓](#)

Administration [Edit ✓](#)

Quote Results

Total monthly Premiums for selected products - £18.86 per month

Products for Chris Dthdg and Dh Dfhds

1. Life Insurance [Edit product](#) [Deselect](#)

£200,000.00 22 years £18.86 per month

Quote and Documents to View or Download

- [Policy Summary](#) (opens in a new window)
- [Personal Quote](#) (opens in a new window)
- [Policy Booklet](#) (opens in a new window)

Quote Date: 10/07/2018 Expiry Date: 08/07/2018 [RE-QUOTE PRODUCT](#)

[Close X](#)

[Previous page](#)

[Policy Documents Menu](#)

How Customers Obtain Policy Documents - Step by Step Guide

STEP 1

Your customer can instantly obtain their policy documents via My Account for policies started after 12/06/2016

[For guidance on accessing pre 12/06/2016 documents click here](#)

Firstly they will need to log into their My Account

[For log in support click here](#)

The screenshot shows the 'My Account / Life Insurance' page. It is divided into two main sections: 'POLICY DETAILS' and 'CURRENT COVER'. The 'POLICY DETAILS' section includes 'Life Insurance', 'Policy no. 0123456789', 'Lives covered Mr A Example', and 'Monthly premium £11.00'. Below this is a navigation bar with 'Overview', 'Payment', and 'Documents' tabs. The 'Documents' tab is highlighted with a red box and a mouse cursor. Below the navigation bar is a 'Documents' section with a message: 'If you have only just taken out your policy, please allow 24 hours for your documents to appear before contacting us. If you received policy documents in the post, copies will not be available online, please refer to the documentation you were sent.' Below the message is a table of documents:

Date	Document	File size
29 Jul 2017	Policy Booklet	PDF 100 - 500 KB
29 Jul 2017	Policy Summary	PDF 100 - 500 KB
29 Jul 2017	Personal Quote	PDF 100 - 500 KB
29 Jul 2017	Personal Details Document	PDF 100 - 500 KB

The 'Policy Booklet' link in the table is highlighted with a red box and a mouse cursor. A green arrow points from the 'Documents' tab to this red box.

Select the policy from the My Account home page

STEP 2

Click 'Documents' to show all documentation for that policy

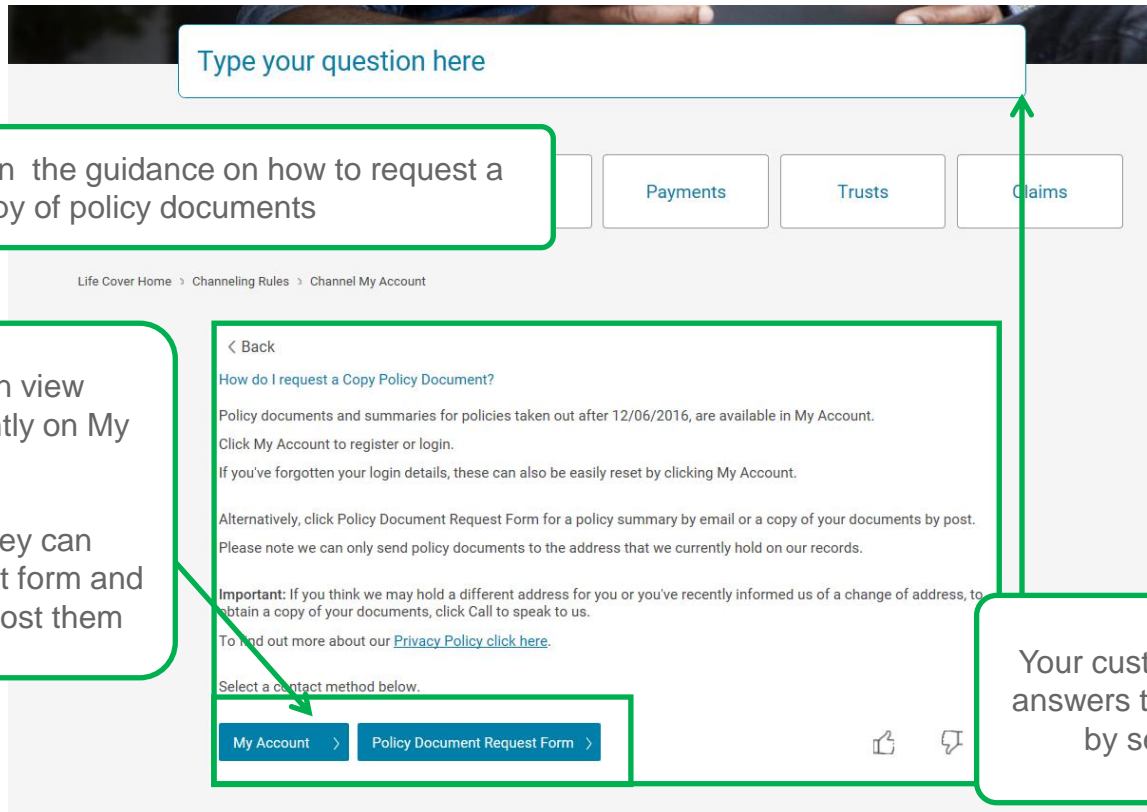
STEP 3

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How Customers Obtain Policy Documents - Step by Step Guide

Your customer can access their policy documents
Our Support Centre gives guidance on how to do this. Click this link to our [Existing Customer Support Centre](#)



The link will open the guidance on how to request a copy of policy documents

Customers can view documents instantly on My Account
Alternatively they can complete a request form and we will email or post them

Your customer can also get answers to others questions by searching here

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[Policy Documents Menu](#)

How to Obtain Policy Documents via Application Summary- Step by Step Guide

STEP 1

You can instantly obtain your client's policy documents in Agent Hub during the first 14 months. First you need to find the policy

Search criteria

Surname
Forename
Date of birth (dd/mm/yyyy)
Postcode
Reference number type
Application Number
Reference number
AN13592331
Applications modified within the last
Life agent number
Application status
Outstanding information items

Search
Clear

Progress

Enter agency number
Date from (dd/mm/yyyy)
Date to (dd/mm/yyyy)

Go

Select 'New Application' along the top of the page

Add policy details and press 'Search'

Progress	Expiring	Total
You've handed off		
They've handed back		
You need to finish		
Applications you can submit		You can submit
We need more information		We need information
We're assessing your applications		You need a decision
Declined/postponed		You need to complete
Reviewed		Issued
Live policies that you're amending		

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How to Obtain Policy Documents via Application Summary- Step by Step Guide



- Summary
- Application Management
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- Documents
- Document Request
- Underwriting Decisions
- UW Capture Decisions
- Special Instructions
- Complaints
- View
- Application Details
- Contact and History
- Application History
- Updates
- Amend Application
- Manage Next Review
- Pay For Evidence
- Manage Addresses
- NTU
- Post Completion

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

Application progress AN13798407 Application locked by: pcssd03

There are no special instructions.

Overview	Life Insurance	Life with critical illness								
Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender			
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	9999999999999999	jest@email.com	No	Male			
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	9999999999999999	vest@email.com	No	Female			
Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium			
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms	£10.00			
						LA2: Standard Terms				
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms	£15.72			
						Total	£25.72			
Payment Details [-]										
Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful Links
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View Policy Documents
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View Policy Documents
Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences				
Agent Test	Default BD Terms	5199997	TESTERGFD, RH1 6PJ	1234567890	agent@email.com	Edit				

STEP 2

Click 'View Policy Document' in the Payment Details section.

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How to Obtain Policy Documents via Application Summary- Step by Step Guide



LOGOUT

NEW APPLICATION

NEXT TASK

MENU

OLP

Correspondence

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 - Amend Application
 - Manage Next Review
 - Pay For Evidence
 - Manage Addresses
 - NTU
- Post Completion
 - Recall Product
 - Copy Policy Documents
 - Redraw
 - Manually Apply Decisions

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

AN13798407 Application locked by: pcss03

Submitted: 22/04/2020 Expiry Date: 22/04/2021 Source: On-line

There are no special instructions.

Agent: Agent Test 5199997

Team: Default IFA Team

LA1: Mr Agent Testing

LA2: Mrs Agent Testing

Document Deletion Exemption Indicator

Outbound Correspondence

Item	Life	Product	Name	Recipient	Address	Destination	Status
Confirming application received	Both		Agent Test	Agent	TESTERGF	Agent	Issued
Copy Application	Both		Agent Test	Agent	TESTERGF	Agent	Issued
Consent Confirmation letter	LA1		Agent Testing	Client	7 Coach House Mews	Client	Issued
Consent Confirmation letter	LA2		Agent Testing	Client	7 Coach House Mews	Client	Issued
Offer Letter	LA2	2. Life+CIC	Agent Testing	Client	7 Coach House Mews	Client	Issued For Archive
Customer Accept offer email	LA2	2. Life+CIC	Agent Testing	Client	7 Coach House Mews	Client	Issued
Customer Accept offer email	LA2	2. Life+CIC	Agent Test	Agent	TESTERGF	Agent	Issued
Thank You email	LA1	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued
Thank You email	LA2	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued
Direct Debit Confirmation Email	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued (Electronic)
Policy Booklet	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued (Electronic)
Policy Summary	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued (Electronic)
Personalised Quote	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client	Issued (Electronic)

STEP 3

You will be taken to the 'Document' section where you can click on 'Policy Booklet'

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How to Obtain Policy Documents via Application Summary- Step by Step Guide



LOGOUT

NEW APPLICATION

NEXT TASK

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 - Manage Addresses
 - NTU
- Post Completion
 - Recall Product
 - Copy Policy Documents
 - Redraw
 - Manually Apply Decisions

This application is in read only mode. Select [EDIT](#) to update and amend.

AN13798407 Application locked by: pcssd03

Submitted: 22/04/2020 Expiry Date: 22/04/2021 Source: On-line

There are no special instructions.

Agent: Agent Test 5199997

Team: Default IFA Team

LA1: Mr Agent Testing

LA2: Mrs Agent Testing

Document Deletion Exemption Indicator

Outbound Correspondence

Item	Life	Product	Name	Recipient	Address	Destination
Confirming application received	Both		Agent Test	Agent	TESTERGFD	Agent
Copy Application	Both		Agent Test	Agent	TESTERGFD	Agent
Consent Confirmation letter	LA1		Agent Testing	Client	7 Coach House Mews	Client
Consent Confirmation letter	LA2		Agent Testing	Client	7 Coach House Mews	Client
Offer Letter	LA2	2. Life+CIC	Agent Testing	Client	7 Coach House Mews	Client
Customer Accept offer email	LA2	2. Life+CIC	Agent Testing	Client	7 Coach House Mews	Client
Customer Accept offer email	LA2	2. Life+CIC	Agent Test	Agent	TESTERGFD	Agent
Thank You email	LA1	1. Life	Agent Testing	Client	7 Coach House Mews	Client
Thank You email	LA2	1. Life	Agent Testing	Client	7 Coach House Mews	Client
Direct Debit Confirmation Email	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client
Policy Booklet	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client
Reissue View Image						
Policy Summary	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client
Personalised Quote	Both	1. Life	Agent Testing	Client	7 Coach House Mews	Client

STEP 4

When you click on 'Policy Booklet' you can then click 'View Image'

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How to Obtain Policy Documents via Application Summary- Step by Step Guide



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View
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Application History
Updates
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Manage Next Review
Pay For Evidence
Manage Addresses
NTU
Post Completion
Recall Product
Copy Policy Documents
Redraw
Manually Apply Decisions

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

AN13798407 Application locked by: pcssd03

Submitted: 22/04/2020 Expiry Date: 22/04/2021 Source: On-

There are no special instructions.

Agent: Agent Test 5199997

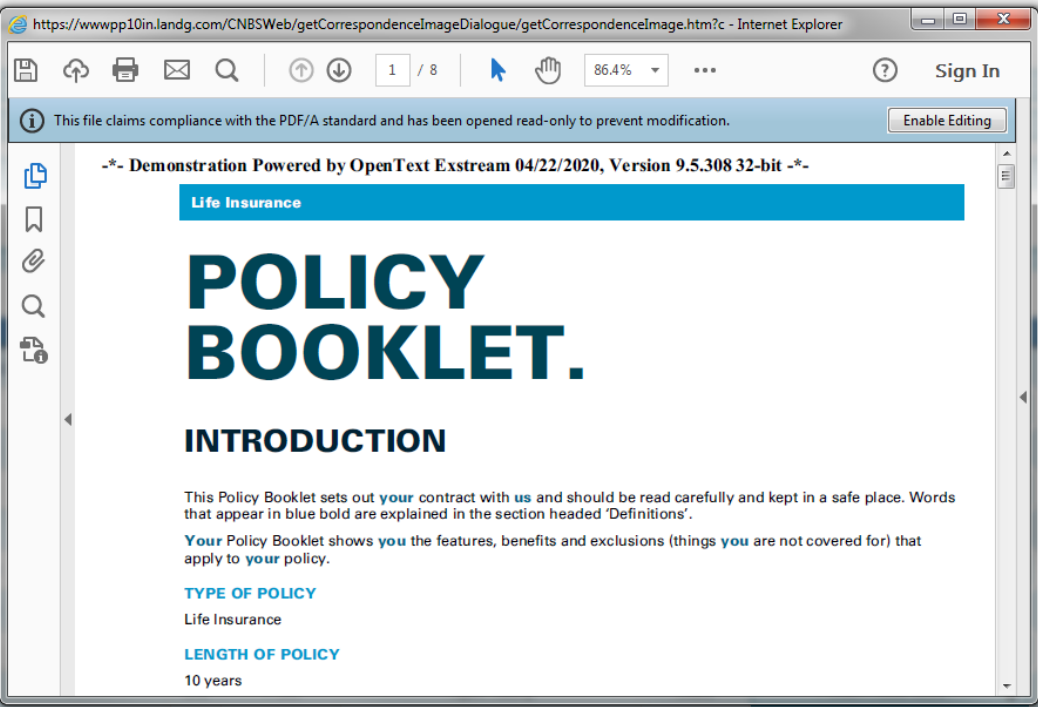
LA1: Mr Agent Testing

LA2: Mrs Agent Testing

Document Deletion Exemption Indicator

Outbound Correspondence

Item							
Confirming application received							
Copy Application							
Consent Confirmation letter							
Consent Confirmation letter							
Offer Letter							
Customer Accept offer email							
Customer Accept offer email							
Thank You email							
Thank You email							
Direct Debit Confirmation Email	Both	1. Life	Agent Testing	Client	7 Coach House Mews		
Policy Booklet	Both	1. Life	Agent Testing	Client	7 Coach House Mews		
Reissue/View Image							



STEP 5

The system will then load up a PDF copy of the 'Policy Booklet' which you can save or print

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Tracking Evidence Menu

- You can see what evidence we need on an application using OLPC
- The Application Summary Page shows you:
 - *What has been issued*
 - *Where this has been issued*
 - *When we have last chased the information*
 - *When we are next due to chase this information*
- You can also see if we have received any information back & the date this was received with us
- If you need to know whether we issued this evidence for age sum assured purposes, you can access our age sum assured limits online on the advisers centre

Tracking evidence is simple.

Please see our Step by Step Guides & Videos on how you can track your applications via OLPC

Step by Step Guide:

[Click here](#) to view our Step by Step Guide on **how you track evidence issued on your applications**

Video Link:

[Click here](#) to view our short video on **how you can track evidence using our application summary page**

Automatic Age Sum Assured Requirements:

[Click here](#) to view our **Automatic Age Sum Assured Limits on our Adviser Centre**

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Track Outstanding Evidence - Step by Step Guide

STEP 1

You can instantly track what evidence is outstanding for your customers. First you need to find the policy

Legal & General

Logout Menu

AGENTHUB

New applications Existing policies

Search criteria

Surname

Forename

Date of birth (dd/mm/yyyy)

Postcode

Reference number type

Application Number

Reference number

AN13592331

Applications modified within the last

Life agent number

Application status

Outstanding information items

Search

Clear

Progress

Enter agency number

Go

Date from (dd/mm/yyyy)

Date to (dd/mm/yyyy)

Clear date filter

You've handed off

They've handed back

You need to finish

Applications you can submit

We need more information

We're assessing your applications

Declined/postponed

Reviewed

Issued

Live policies that you're amending

Select 'New Application' along the top of the page

Add policy details and press 'Search'

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Track Outstanding Evidence - Step by Step Guide

STEP 2

Select the application 'Life'
The progress bar will show you when we 'require more information' before we can assess the application

You can see details of what's outstanding for each customer and product. This includes status and relevant dates.



Summary

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

Application progress AN13782509 Application locked by: pcssd03

There are no special instructions.

Overview **Life Insurance**

Policy #	Policy Number	Lives Assured	Amount of Cover	Type of Cover	Term	Trust	Premium	Start Date
1		LA1	£369,311.00	Level	10 years	No	£10.00 (subject to underwriting)	21/04/2020

Policy 1

Life assured 1: Mr Test Case

We are assessing your application → We require more information → We are assessing information → We have made our decision → Policy is live → Post completion

Outstanding Evidence requested	Status	Request date	Exam date	Last chased	Next chase	Received on	Payment	Paid on
Patient Health Report	Issued	21/04/2020		21/04/2020	12/05/2020		Pending	

We are expecting a PHR from the GP stated below. This typically takes 35 days to return. It may help to speed up the process to arrange for your client to phone the surgery directly using the contact details below:

GP surgery name	GP surgery address	Phone number	Issue method	Requested by
Xyzabc	Xyzabc, sdgfdh, RH1 6RT		Paper	Underwriter

Some evidence (Patient Health Report) may show additional information when you click it such as 'surgery details' and 'method of issue'

[Find out more in our 1 minute video.](#)

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[Tracking Evidence Menu](#)



Starting a Policy Menu

- You can start a policy/policies online yourself via OLPC.
- Once terms have been offered & the customers are happy to proceed you can accept the offer online & provide a policy start date.
- Your customers can also start their policies once terms are issued via their My Account.
- If there is anything else we require prior to starting a plan you will be able to see any outstanding required information on the Application Summary page on OLPC.

Starting a policy is a simple process.

You can use the application summary page to see when your plan is ready to start. You will be able to see if there are any outstanding requirements needed before starting your plan & you can quickly link into the application to activate the policy when you are ready,

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can start a policy via OLPC.**

Video Links:

[Click here](#) to view our video on **how you can start a policy via OLPC.**

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Starting a Policy - Step by Step Guide

STEP 1

You can instantly see what evidence is outstanding for your customer. Start by finding the policy.

The screenshot displays the AGENTHUB interface. At the top right, there are links for 'Logout' and 'Menu', and the text 'AGENTHUB'. Below this, there are two tabs: 'New applications' (highlighted in green) and 'Existing policies'. The 'New applications' section is divided into a 'Search criteria' sidebar on the left and a 'Progress' section on the right. The 'Search criteria' sidebar contains fields for Surname, Forename, Date of birth (dd/mm/yyyy), Postcode, Reference number type (Application Number), Reference number (AN13592331), Applications modified within the last, Life agent number, Application status, and Outstanding information items. A 'Search' button and a 'Clear' button are at the bottom of the sidebar. The 'Progress' section has a 'Go' button and date filters. Below the progress bar is a table with columns for 'Expiring', 'Total', 'You've handed off', 'They've handed back', 'You need to finish', 'Applications you can submit', 'You can submit', 'We need more information', 'We need information', 'We're assessing your applications', 'You need a decision', 'Declined/postponed', 'You need to complete', 'Reviewed', and 'Issued'. A green box with an arrow points to the 'New applications' tab with the text 'Select 'New Application' along the top of the page'. Another green box with an arrow points to the 'Search' button with the text 'Add policy details and press 'Search''.

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Starting a Policy - Step by Step Guide

STEP 2

Select 'EDIT' along the top



LOGOUT NEW APPLICATION NEXT TASK MENU

Summary

This application is in read only mode. Select [EDIT](#) to update and amend.

Application progress ANZ0241539 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	S
LA1	Mr Test Application	12 June 1990	Legal & General Assurance Society L, BN3 7PY	00000000000	testapplication@test.com	N

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance		LA1: Decision Made	£102,250	15 years		LA1: Standard Terms
Total						

Adviser	Agency	Agency no.	Address	Phone	Email	Contact p
Test Adviser	OLAIFA1 Sub1	5035704	LEC 4 Testing Bay 204, KT20 6EU			Edit

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Starting a Policy - Step by Step Guide

STEP 3

Select the relevant product tab along the top. Here you will see the plan is ready to start & just requires a Policy Start Date. You can click on the 'Policy Start Date' link to take you into the application

OLP Co

Application progress All 13737599 Application locked by: pcssd03

There are no special instructions.

Overview **Life Insurance**

Policy #	Policy Number	Lives Assured	Amount of Cover	Type of Cover	Term	Trust	Premium	Start Date	UW Decision
1		LA1	£356,610.00	Level	20 years	No	£15.00		LA1: Standard Terms

Policy 1

Life assured 1: Miss Test Application

We are assessing your application → We require more Information → We are assessing Information → **We have made our decision** → Policy is live → Post completion

We made our decision on 25th March on Life Insurance for Miss Test Application. Please review the details with your customer and accept the offer.

Please complete the actions below by switching to EDIT mode using the button above.

Action	Status	Date Action Raised	Review Date	Date Completed	Cancellation Reason
Product Start Date	Required	25/03/2020	01/04/2020		

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Starting a Policy - Step by Step Guide

STEP 4

Under the 'Product Summary' heading, select the calendar icon to add a start date

Product Summary

Note: Payment details for all the products will be defaulted to the first details input but can be amended for each product if required.

Products for Mr A Example

1. Life Insurance with Critical Illness Cover - (Standard terms)

Cover Amount: £29961.00

Length of Cover: 15 years

Premium: £12.00 per month

Payment Details :

[Edit](#)

Payee Name : Unconfirmed

Start Date:(Up to 24/10/2018)



[Let your customer know when to expect the first premium will be collected](#)

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Starting a Policy - Step by Step Guide

STEP 5

Scroll down to complete the 'Agent Declaration'

Update Agent Details

Agent Declaration

Please confirm that this sale has been made in accordance with your organisation's compliance process and that the statements relating to medical consent were read to the applicant(s).

I agree to the above

SUBMIT

Confirm and press 'Submit'

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Starting a Policy - Step by Step Guide

STEP 6

A message will confirm acceptance or any additional steps you need to take

Thank you

Thank you for applying on-line.

The following policies have been accepted:

1. Life Insurance for Mr A Example

You must tell your customer this

Once the policy has been accepted, it's important that your customer checks the information they have provided us is correct as it could affect any claims.

This must be done even if the policy has started.

Your customer will be sent an email ([click here](#) to view an example) giving the following instructions. Please ensure your customer completes this action.

1. Register or Login to My Account	Your user ID is normally your email address unless you chose something different. If you have not already chosen a user ID and password you will also have the opportunity to create them. Complete the details requested on the registration screen and this will securely log you in.
2. Click on the 'Mailbox' icon	In My Account, the Mailbox icon is located at the top of the screen.
3. Click on 'Confirm your details'	This will show you the information you provided to us in your application. Please ensure all of your details are correct.
4. Confirm your details	Once you have reviewed your information, please click on one of the buttons to either:

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[Starting a Policy Menu](#)

Further Medical Information Menu

- You can amend medical information within the application to provide further information after submission if you have new/more information to provide
- Once updated our system will automatically underwrite this where possible. Giving you an immediate decision or it may show you that we need more information like a GP report off the back of assessing the new information provided
- If we cannot automatically underwrite the amendment then this will automatically refer to our Underwriting team for them to assess the changes made

Further medical information can be provided by amending the application.

Please see our Step by Step Guides on how to amend medical information within the application online

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can make an amendment to the medical details via OLPC**

Pre-Sales Support:

Please [click here](#) to view information on our pre-sales support team & what information we need from you in order to advise you on how your customers medical history may affect terms we can provide

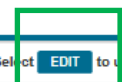
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Further Medical Information: Step by Step Guide

STEP 1

Select 'EDIT' along the top of the page



LOGOUT NEW APPLICATION NEXT TASK MENU

OLP Connect

Summary

- Application Management
 - Manage Application
 - Application Summary
 - Workbench
 - Capture Contact
 - Documents
 - Document Request
 - Underwriting Decisions
 - UW Capture Decisions
 - Special Instructions
 - Complaints
 - View
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 - Contact and History
 - Application History
- Updates
 - Amend Application
 - Manage Next Review
 - Pay For Evidence
 - Manage Addresses
 - NTU
 - Post Completion

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

Application progress AN13798407 Application locked by: pcssd03

There are no special instructions.

Overview	Life Insurance	Life with critical illness								
Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender			
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	999999999999999	jest@email.com	No	Male			
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	999999999999999	vest@email.com	No	Female			
Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium			
<u>Life Insurance</u>	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms	£10.00			
						LA2: Standard Terms				
<u>Life Insurance with Critical Illness Cover</u>		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms	£15.72			
						Total	£25.72			
Payment Details [-]										
Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful Links
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View Policy Documents
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View Policy Documents
Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences				
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PJ	1234567890	agent@email.com	Edit				

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Further Medical Information: Step by Step Guide

STEP 2

Select 'Amend Application' down the left hand side menu

Legal & General OLP Co

LOGOUT NEW APPLICATION NEXT TASK MENU

Summary

Application Management +

View +

Updates -

Amend Application

Manage Next Review

Pay For Evidence

Manage Addresses

NTU

Post Completion -

Recall Product

Copy Policy Documents

Redraw

Manually Apply Decisions

Application progress AN20237585 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status
LA1	Mr Flem Tes	08 May 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No
LA2	Mrs Flemma Test	05 December 1987	81a Brighton Road, RH1 6PS	0123456789	priyanka.mk@landg.com	No

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision
Life Insurance	0130950082	LA1: Live	£237,651	5 years	16/11/2019	LA1: Standard Terms - Under Review
Mortgage Decreasing Life Insurance with Critical Illness Cover	0130950090	LA2: Live	£80,998	5 years	16/11/2019	LA2: Standard Terms - Under Review
Total						

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences
Umma Fof3anji	IFA Quotes	5199997	37 Barrow Road, CR0 4EZ	0986754321	hemraj.jain@landg.com	Edit

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Further Medical Information: Step by Step Guide

STEP 3

Select 'Menu' in the top right hand corner & then select 'Screen status' from the drop down list

The screenshot displays a web application interface. At the top, there is a navigation bar with buttons for 'LOGOUT', 'NEW APPLICATION', and 'NEXT TASK'. A 'MENU' dropdown is open in the top right corner, showing options: Home, Save screen, AgentHub, Preferences, Adviser Centre, BP Centre, Cancel amendments, Screen Status (highlighted with a green box), and About. Below the navigation bar, the main content area shows 'Application Reference : AN20237770'. A table lists application details with 'Edit' links and checkmarks:

Application Reference : AN20237770	
Basic Details	Edit ✓
Product Selection	Edit ✓
Product Details	Edit ✓
Administration	Edit ✓
Quote Results	

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Further Medical Information: Step by Step Guide

STEP 4

Select 'Health & Lifestyle' for the relevant applicant that you need to amend

Application screen status

- [Quote](#)
 - [Basic Details](#)
 - [Product Selection](#)
 - [Product Details](#)
 - [Family](#)
 - [1. Life Insurance - Mr Alpha Test and Mrs Beta Test](#)
 - [Administration](#)
 - [Quote Results](#)
- [Application](#)
 - [Important Information](#)
 - [Personal Details](#)
 - [Medical Consent for first applicant](#)
 - [Medical Consent for second applicant](#)
 - [Doctors Details](#)
 - [Health and Lifestyle for first applicant](#)
 - [Health and Lifestyle for second applicant](#)
 - [Confirm Your Details](#)
 - [Your Declaration](#)
 - [Decision](#)
 - [Trust and ownership of benefits](#)
 - [Product Summary](#)
 - [Thank you](#)

Close

10 years £120.80 per month

Documents to View or Download

product is under review. Please refer to the Decision screen.

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Further Medical Information: Step by Step Guide

STEP 5

Locate the question you wish to provide further information on & amend the information you need to change. Then select 'continue'

Health - Ever for Alpha Test

Have you ever had diabetes or a heart condition, for example angina, heart attack, heart valve problem, heart surgery?

Yes No [Edit my answer](#)

Please select from this list. Only select other when you cannot find a match.

Diabetes

Have you been on insulin since your diabetes was first treated?

Yes No

How long ago was your last diabetic review at your GP's surgery, a diabetic clinic or hospital?

7 Years 0 Months

Have you another condition or illness to tell us about under this heading?

Yes No

↓ CONTINUE

Allow Alpha Test to complete the application

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Further Medical Information: Step by Step Guide

STEP 6

Continue through to re-submit this new information by going to the 'Confirm Your Details' page

The screenshot shows a web form with a light blue header containing the text "Health and Lifestyle for Data Test" and an "Edit" link. Below the header is a grey bar with the text "Confirm Your Details" on the left and "To be completed" on the right. Below this bar is another light blue section with the text "Your Declaration" and an "Edit" link.

STEP 7

Check that all information is now correct & proceed to the 'Decision page':

The screenshot shows a web form with a light blue header containing the text "Your Declaration" and an "Edit" link. Below the header is a dark red bar with the text "Decision" on the left and "More information required !" on the right. Below this bar is another light blue section with the text "Trust and ownership of benefits" and "To be completed".

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Further Medical Information: Step by Step Guide

STEP 8

Here you will see if the application has automatically underwritten the new information or if we have had to refer this to our underwriting team to assess

Decision for 1 - Life Insurance for Mr Alpha Test and Mrs Beta Test

Referred

If changes are made to the application that impact the underwriting decision, Legal & General may need to ask you some further underwriting questions when you submit your application.

We need to assess the information provided and we'll let you know when we've made a decision.

Please click [underwriting explained \(opens in a new window\)](#) for information about how we assess applications. This includes common reasons why we can't always offer the cover applied for.

Amount of cover	Length of cover	Monthly premium
£500,000.00	10 years	£120.80

We will update this screen when we have a final underwriting decision.

For more information on what happens next please refer to our [What Happens After You Apply \(opens in a new window\)](#) leaflet.

[Copy Application \(opens in a new window\)](#)

↓ CONTINUE

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Further Medical Information: Step by Step Guide

STEP 9

Proceed to the 'product summary' page & 're-submit' the application

Trust and ownership of benefits

[Edit](#) ✓

Product Summary

[More information required](#) !

Auto Start and Immediate Cover

[Update Agent Details](#)

Existing Policy

Our records show that there may be an existing Legal & General policy, which is not being replaced by this new application. Please confirm this is the case or [click here to let us know which policies are being replaced](#).

I / We confirm that no existing policies are being replaced.

Submit

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[Further Medical Information Menu](#)



Changing Your Agent Details Menu

- You can update & amend your agent contact details yourself via OLPC
- You can update & amend your correspondence preferences online via OLPC
- If you need to amend this on a particular case only this can also be done online within the application on OLPC

Contact Preferences & Contact Details.

Its important to ensure that we hold the right contact details for you & that your contact preferences are correct. This will ensure we are sending you notifications & communications in the most effective way for you

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can amend your contact details & preferences from the 'Application Summary' tab in OLPC**

Step By Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can amend your contact details & preferences from the 'Menu' tab in OLPC**

[Main Menu](#)



Changing Your Agent Details- Step by Step Guide



- Summary
- Application Management
 - Manage Application
- Application Summary
- Workbench
- Capture Contact
- Documents
 - Document Request
- Underwriting Decisions
- UW Capture Decisions
- Special Instructions
- Complaints
- View
- Application Details
- Contact and History
- Application History
- Updates
 - Amend Application
 - Manage Next Review
 - Pay For Evidence
- Manage Addresses
- NTU
- Post Completion

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

Application progress AN13798407 Application locked by: pcssd03

There are no special instructions.

Overview Life Insurance Life with critical illness

Life	Life assured	Date of birth	Contact Address	Contact phone	Contact email	Smoker status	Gender
LA1	Mr Agent Testing	03 March 1994	7 Coach House Mews, RH1 6RT	9999999999999999	jest@email.com	No	Male
LA2	Mrs Agent Testing	11 December 1993	7 Coach House Mews, RH1 6RT	9999999999999999	vest@email.com	No	Female

Products	Policy number	Status	Amount of cover	Term	Start date	UW Decision	Premium
Life Insurance	0215236985	Live	£205,769	10 years	23/04/2020	LA1: Standard Terms	£10.00
						LA2: Standard Terms	
Life Insurance with Critical Illness Cover		LA2: Decision Made	£60,710	11 years	23/04/2020	LA2: Non-Standard Terms	£15.72
						Total	£25.72

Payment Details [-]

Policy	Start date	Payer	Prev collection	Amount	Next collection	Amount	Frequency	Bank account	Sort code	Useful Links
Life Insurance	23/04/2020	Joint	NA	£10.00	To be advised	£10.00	Monthly	99999999	999999	View Policy Documents
Life Insurance with Critical Illness Cover	23/04/2020	Joint		£15.72			Monthly	99999999	999999	View Policy Documents

Adviser	Agency	Agency no.	Address	Phone	Email	Contact preferences
Agent Test	Default BD Terms	5199997	TESTERGF, RH1 6PJ	1234567890	agent@email.com	Edit

STEP 1

Click the 'edit' button

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Changing Your Agent Details- Step by Step Guide

STEP 2

From this page you can amend your Contact Address

Legal &
General

OLP Connect

Contact Preferences

Update Agent Profile

Agency

Life Agency Number

5035704

Life Agency Name (optional)

OLAIFA1 Sub1

Agent Name

TestFTE Pavan

Get Name

Registered Address

House No/Name and Street (optional)

LEC 4 Testing Bay 204

Address Line 2 (optional)

Legal & General House

Address Line 3 (optional)

Tadworth

Address Line 4 (optional)

Surrey

Postcode (optional)

KT20 8EU

Correspondence Address

Please tick the box if your Correspondence Address is the same as your Registered Address. If the address is different, please untick the box and enter your details below.

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Legal &
General

Changing Your Agent Details- Step by Step Guide

STEP 3

If you then scroll down the page you can amend your Contact Details & Your Correspondence Preferences

KT20 0EU

Contact Details

Telephone Number (optional)

000000000000

Mobile Phone No (optional)

000000000000

Fax No (optional)

Underwriting Basis: (optional)

Interactive Only

Optional Static

E-mail Address (optional)

test@test.com

Repeat E-mail Address (optional)

test@test.com

Administrator E-mail Address (optional)

Additional Administrator E-mail Address (optional)

Receive emails on underwriting decisions?

Yes

No

Correspondence Preferences

	Client ?	Agent Correspondence Address/Email ?	Agent Registered Address/Email ?	Administrator Email ?
General Correspondence ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Letters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Original Policy Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lapse Notification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ok

Note: It is extremely important we hold the correct details & preferences for you so that we can notify you of important changes to your plans for example 'Lapse Notifications'

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[Changing Your Agent Details Menu](#)



Changing Your Agent Details- Step by Step Guide

STEP 1

Click 'Menu' then 'Contact preferences'

The screenshot displays the Legal & General agent portal interface. At the top left is the Legal & General logo. Below it is a news banner. The main navigation bar includes 'Logout', 'New application', and a 'Menu' dropdown. The 'Menu' dropdown is open, showing options: 'Home', 'Contact preferences', and 'View terms and conditions'. A red box highlights the 'Menu' dropdown, and another red box highlights the 'Contact preferences' option. A mouse cursor is shown clicking on 'Contact preferences'. Below the navigation bar, there are two tabs: 'In progress applications' (active) and 'Existing policies'. The 'In progress applications' section contains a 'Search criteria' form with fields for 'Surname', 'Forename', and 'Date of birth (dd/mm/yyyy)'. To the right is a 'Progress' section with 'Date from' and 'Date to' filters, and a table titled 'Your quotes' with columns 'Expired', 'Expiring', and 'Total'. The 'Expired' column shows '31', 'Expiring' shows '9', and 'Total' shows '31'.

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Changing Your Agent Details- Step by Step Guide

STEP 2

From this page you can amend your Contact Address

Legal &
General

OLP Connect

Contact Preferences

Update Agent Profile >

Agency

Life Agency Number

5035704

Life Agency Name (optional)

OLAIFA1 Sub1

Agent Name

TestFTE Pavan

Get Name

Registered Address

House No/Name and Street (optional)

LEC 4 Testing Bay 204

Address Line 2 (optional)

Legal & General House

Address Line 3 (optional)

Tadworth

Address Line 4 (optional)

Surrey

Postcode (optional)

KT20 8EU

Correspondence Address

Please tick the box if your Correspondence Address is the same as your Registered Address. If the address is different, please untick the box and enter your details below.

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Legal &
General

Changing Your Agent Details- Step by Step Guide

STEP 3

If you then scroll down the page you can amend your Contact Details & Your Correspondence Preferences

KT20 0EU

Contact Details

Telephone Number (optional)

000000000000

Mobile Phone No (optional)

000000000000

Fax No (optional)

Underwriting Basis: (optional)

Interactive Only

Optional Static

E-mail Address (optional)

test@test.com

Repeat E-mail Address (optional)

test@test.com

Administrator E-mail Address (optional)

Additional Administrator E-mail Address (optional)

Receive emails on underwriting decisions?

Yes

No

Correspondence Preferences

	Client ?	Agent Correspondence Address/Email ?	Agent Registered Address/Email ?	Administrator Email ?
General Correspondence ?	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Offer Letter	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Review Letters	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Original Policy Documents	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lapse Notification	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ok

Note: It is extremely important we hold the correct details & preferences for you so that we can notify you of important changes to your plans for example 'Lapse Notifications'

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[Changing Your Agent Details Menu](#)



Existing Business Menu

- Once your policies are in force you can view details of these plans using our Existing Business Agent Hub
- You can retrieve Policy Documents for plans started after 2016 via our Existing Business Agent Hub
- You have access to view what the current sum assured is on a decreasing policy on the Existing Business Agent Hub
- You have access to important information about the status of your customers plans & the status of their direct debits & any outstanding requirements needed to get a plan back up to date on the Existing Business Agent Hub

Step by Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can check the sum assured on your customers existing policy**

Step by Step Guide:

[Click here](#) to view our Step by Step Guide on our **Existing Business Agent Hub**

Step by Step Guide:

[Click here](#) to view our Step by Step Guide on **how you can check the status of your customers existing policy**

Video Link:

[Click here](#) to view our video on **how you can view & manage your existing business on the Existing Business Agent Hub**

Video Link:

[Click here](#) to view our video on **how you can monitor lapses and cancellations via the Existing Business Agent Hub**

Existing Business Customer Support:

[Click here](#) to view our guide on **how your customer can access existing business customer support**

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Existing Business Agent Hub- Step by Step Guide

Your Existing Business Agent Hub landing page will look like the below

You can search for a specific client or policy

You can view all policies that have had an event on them

You can view policies that have a cancelled direct debit

You can view policies that have had a failed direct debit

You can view policies that are cancelled

You can view policies that are due to go off risk this week

You can view policies that are due to go off risk this month

You can view policies that have been cancelled & due clawback of commission this month

The screenshot displays the 'Existing policies' section of the Business Agent Hub. It features a search filter on the left with fields for Surname, Date of birth, and Policy number, along with 'Search' and 'Clear' buttons. The main area is titled 'Policy events' and includes an 'Enter agency number' field (5199997) and a 'Go' button. Below this, there are several data rows with expandable sections:

- All of your events:** Total 255
- Your first notifications:** DD failures 10, Cancellations 6
- Your Direct Debit failures:** Last week 0, Total 35
- Your cancellations:** Last week 40, Total 203
- Your policies going off risk:** Off risk this week 6, Off risk this month 51, Clawback this month 126

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Existing Business Agent Hub- Step by Step Guide

By clicking into each of these categories you will be shown a list of all of your plans that fall within that section

New applications Existing policies

Search existing policies

Surname

Date of birth (dd/mm/yyyy)

OR

Policy number

Search

Clear

Useful links

Search results > Your cancellations > Last week

Total potential loss : £3199.46

Filter:

Policy number	Event created	Event type	Customer name(s)	Clawback	Clawback due	Agent/FRN
0200124683	24/03/2020	Cancelled from outset	Mr Firajjgkdwmaf Phxiwmyxwudx	£158.48	17/03/2020	5199997
0200125227	24/03/2020	Cancelled from outset	Mr Sgsdsh Phxjkn	£233.58	24/03/2020	5199997
0200125235	24/03/2020	Lapse	Mr Sgsdsh Phxjkn			5199997
0200125003	24/03/2020	Lapse	Mr Wjiversjk Phxpoiug	£453.52	23/03/2020	5199997
0S05006208	24/03/2020	Cancelled from outset	Mr Fdghshaghj Phxghsdgfdygs			5199997
0200118057	24/03/2020	Lapse	Mr Swgwwpuu Jitotnidn Mr Secayldcmefcii Phxyginlutgl	£239.76	03/03/2020	5199997
0200125243	24/03/2020	Lapse	Mr Dldectrcpq Nvtfbkmdte Mr Secabrdjvnsdsp Phxqegmlmonga	£244.86	24/03/2020	5199997
0200119337	23/03/2020	Lapse	Mr John Phxmelody	£114.37	06/03/2020	5199997
0200119360	23/03/2020	Lapse	Mr Jonny Phxmelody	£203.74	06/03/2020	5199997
0200119378	23/03/2020	Lapse	Mr Jack Phxmelody	£122.25	06/03/2020	5199997
0200113561	23/03/2020	Lapse	Mr Firij Phxfirj	£140.33	16/03/2020	5199997
0200124899	23/03/2020	Cancelled from outset	Mr Dfhdhd Phxnjkj	£233.58	20/03/2020	5199997
0200124673	23/03/2020	Cancelled from outset	Mr Dfhdhd Phxnjkj	£233.58	20/03/2020	5199997
0200124774	23/03/2020	Lapse	Mr Uiaefuweru Phxchgsgyfyus	£57.72	01/04/2020	5199997
0200120285	23/03/2020	Cancelled from outset	Mr Vridwe Phxyuwrfg	£110.85	11/02/2020	5199997
0200125078	23/03/2020	Cancelled from outset	Mr Sdjhfgysag Phxcdsfh	£135.86	23/03/2020	5199997
0200125086	23/03/2020	Cancelled from outset	Mr Sdjhfgysag Phxcdsfh	£120.94	23/03/2020	5199997
0200125128	23/03/2020	Lapse	Mr Firafdjwexbepg Phxwgmavxrlet	£151.18	23/03/2020	5199997
0200125011	23/03/2020	Lapse	Mr Rdwfoywbfa Ksefkyrvng Mrs Firaghaffmdvl Phxrdwalgknsu	£244.86	23/03/2020	5199997
0200125029	23/03/2020	Cancelled from outset	Mr Wghfhgh Phxcdfdg Mr Elghgh Phxdgf			5199997
0200125052	23/03/2020	Cancelled from outset	Mr Wghfhgh Phxcdfdg Mr Elghgh Phxdgf			5199997

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Do you have a question?

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Existing Business Agent Hub- Step by Step Guide

You can view each policy individually by clicking on the policy number where you will be shown the below screen

You can select 'Show More' on each section to expand the box & view more information

CONTACT DETAILS				Show more
Life insured				
Name	Address	Postcode	Date of Birth	
Mr Wqiversjk Phxpoiug	1 Queens Road, Glenchwarton, KING'S LYNN	PE34 4BN	20/06/1987	

EVENT DETAILS - Lapse					Show more
Event created	Event status	Clawback	Clawback due	Policy lapse	
24/03/2020	Policy lapsed	£453.52	23/03/2020	23/03/2020	

NOTE HISTORY			Show more
Date	User	Details	
24/03/2020	SYSTEM	Policy lapsed	

PRODUCT DETAILS - Life Insurance						Show more
Amount of Cover	Policy status	Policy start date	Policy end date	Monthly premium	Collection day	
£1,361,732.00	InForce	23/03/2020	22/03/2025	£45.00	23	

OTHER PRODUCTS		
Product number	Product name	Lives insured
0200124998	Life Insurance	Mr Wqiversjk Phxpoiug

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Existing Business Agent Hub- Step by Step Guide

You can view your customers contact & personal details

LOGOUT

← BACK

Existing Policy Details 0200125003

AGENTHUB

CONTACT DETAILS				Show less ^
Life insured				
Name	Address	Postcode	Date of Birth	
Mr Wqiversjk Phxpoiug	1 Queens Road, Clenchwarton, KING'S LYNN	PE34 4BN	20/06/1987	
Gender	Smoker status	Phone	Email	
Male	-	1234567891	rajitha.kodavati@landg.com	

EVENT DETAILS - Lapse					Show
Event created	Event status	Clawback	Clawback due	Policy lapse	
24/03/2020	Policy lapsed	£453.52	23/03/2020	23/03/2020	
Off risk	Reason for cancellation	Reinstatement options			
23/03/2020	Lapse	Refer to Service Area			
Reinstatement requirements					
Direct Debit instruction	Arrears amount	Declaration of Health			
Not required		Not applicable			
Current Cover Period	Next premium due	Outstanding amount			
-					
This record is active.					

You can view any events that have occurred on the plan. Including any lapses & commission clawbacks as well as requirements such as DOH & DDM

NOTE HISTORY		
Date	User	Details
24/03/2020	SYSTEM	Policy lapsed

You can add your own notes to each case

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Existing Business Agent Hub- Step by Step Guide

PRODUCT DETAILS - Life Insurance					
Amount of Cover	Policy status	Policy start date	Policy end date	Monthly premium	Collection
£1,361,732.00	InForce	23/03/2020	22/03/2025	£45.00	23
Trust	Premium basis	Waiver	TIC	TPD	CCIC
N	Guaranteed	Yes	Yes	No	No
Original cover	Conversion option	2nd death	Quote date		
£1,361,732.00	No	No	2020-01-01		
Policy documents					
Personalised quote	Policy summary	Policy booklet			

You can view the policy details including:

- Amount of cover
- Policy Status
- Start and End Date
- Premium Amount & Collection Date
- If the plan is under Trust
- Additional Benefits like Waiver of Premium

You can access Policy Documents here & view your Agency Details here too

Name	Benefit premium	Reassured?	T&C Version	T&C Vers
services	£0.00	No	NSS112017	Nurse Sup Services M
Name	Agent	Master agent	Servicing agent	
IFA Quotes	5199997	5199997	5199997	

OTHER PRODUCTS		
Product number	Product name	Lives insured
0200124998	Life Insurance	Mr Wqiversjk Phxpoiug

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[Existing Business Menu](#)



Existing Business- Check Sum Assured of an Existing Plan- Step by Step Guide

STEP 1

To check the sum assured of your client's existing policy on the Agent Hub. From the home screen, enter the policy details and click 'Search'

The screenshot displays the AGENTHUB interface. At the top right, there are links for 'Logout', 'New application', and 'Menu'. Below this is the 'AGENTHUB' logo. A navigation bar contains 'In progress applications' and 'Existing policies', with the latter highlighted by a red box and a mouse cursor. On the left, a 'Search existing policies' form is highlighted with a red border. It includes fields for 'Surname', 'Date of birth (dd/mm/yyyy)', and 'Policy number', with a 'Search' button and a 'Clear' button. Below the search form are 'Useful links'. The main content area is titled 'Policy events' and includes a toggle for 'Include inactive records?' (set to 'No') and links to 'Click here to download data' and 'Click here to view saved cases'. Below this is a table with the following rows:

(i) All of your events		Total	
(i) Your first notifications	DD failures	Cancellations	
(i) Your Direct Debit failures	Last week	Total	
(i) Your cancellations	Last week	Total	
(i) Your policies going off risk	Off risk this week	Off risk this month	Do you have a question?

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Existing Business- Check Sum Assured of an Existing Plan- Step by Step Guide

STEP 2

In the 'Product Details' section of the screen you can see your client's current sum assured displayed under 'Amount of Cover'

LOGOUT

BACK

Existing Policy Details

AGENTHUB

CONTACT DETAILS

Show more

Life insured

Name	Address	Postcode	Date of Birth
------	---------	----------	---------------

EVENT DETAILS - Cancelled from outset

Show more

Event created	Event status	Clawback	Clawback due	Policy lapse
---------------	--------------	----------	--------------	--------------

NOTE HISTORY

Show more

Date	User	Details
------	------	---------

Click on 'Show more' to display further information about your client's existing policy. For example the 'Original cover' amount

PRODUCT DETAILS - Life Insurance

Show more

Amount of Cover	Policy status	Policy start date	Policy end date	Monthly premium	Collection day
£150,000.00	InForce	27/06/2018	26/06/2038	£6.31	27

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[Existing Business Menu](#)



Existing Business- Status of an Existing Plan- Step by Step Guide

STEP 1

You can check the status of your client's existing policy.
From the home screen, enter the policy details and click 'Search'

The screenshot shows the AGENTHUB interface. At the top right, there are links for 'Logout', 'New application', and 'Menu'. Below this is the 'AGENTHUB' logo. A navigation bar contains 'In progress applications' and 'Existing policies'. The 'Existing policies' button is highlighted with a green box. Below the navigation bar, there is a search form for existing policies, highlighted with a red box. The search form includes fields for 'Surname', 'Date of birth (dd/mm/yyyy)', and 'Policy number', along with 'Search' and 'Clear' buttons. To the right of the search form is the 'Policy events' section, which includes a toggle for 'Include inactive records?' (set to 'No') and links to 'Click here to download data' and 'Click here to view saved cases'. Below this are several summary cards for policy events, including 'All of your events', 'Your first notifications', 'Your Direct Debit failures', 'Your cancellations', and 'Your policies going off risk'. Each card shows counts for 'Total', 'Last week', and 'Off risk this week'.

Event	Total
All of your events	0
Your first notifications	0
Your Direct Debit failures	0
Your cancellations	0
Your policies going off risk	0

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Existing Business- Status of an Existing Plan- Step by Step Guide

STEP 2

You can view the 'Policy Status' at the bottom of the screen

Existing Policy Details AGENTHUB

LOGOUT ← BACK

CONTACT DETAILS Show more ▾

Life insured

Name	Address	Postcode	Date of Birth

EVENT DETAILS - Cancelled from outset Show more ▾

Event created	Event status	Clawback	Clawback due	Policy lapse

NOTE HISTORY Show more ▾

Date	User	Details

PRODUCT DETAILS - Life Insurance Show more ▾

Amount of Cover	Policy status	Policy start date	Policy end date	Monthly premium	Collection day
£150,000.00	InForce	27/06/2018	26/06/2038	£6.31	27

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Existing Customer Support - Step by Step Guide

Your existing customer can get answers to questions.
They can actions many requests such as
Change of Address and Request Policy Documents

STEP 1

Visit the Support centre at <https://www.legalandgeneral.com/existing-customers>

Type your question here

COVID-19 Change My Details Change My Policy Payments Trusts Claims

Life Cover Home > Change My Details

- How do I request a Copy Policy Document? ▾
- How do I update my address? ▾
- Where can I find my policy number? ▾
- How do I change my personal details? ▾
- How do I update my name? ▾
- My smoker status has changed, does this affect my policy? ▾
- I have changed my occupation, does this affect my policy? ▾
- How do I contact Legal & General from abroad? ▾
- Does moving outside of the UK affect my policy? ▾

Type your question here

Or

Search our most popular
Frequently Asked Questions
by category

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