

LV= Protection Progress Hub

A quick guide to tracking your online Protection applications

The LV= Protection Progress Hub is a convenient and time-saving tool to help you track the progress of your online protection applications 24/7. If you already use the Hub you'll know how valuable it is; so far this year thousands of advisers have used the Hub. If you haven't registered to use it, it's really straightforward, just read on to find out how it can make your life a lot easier.

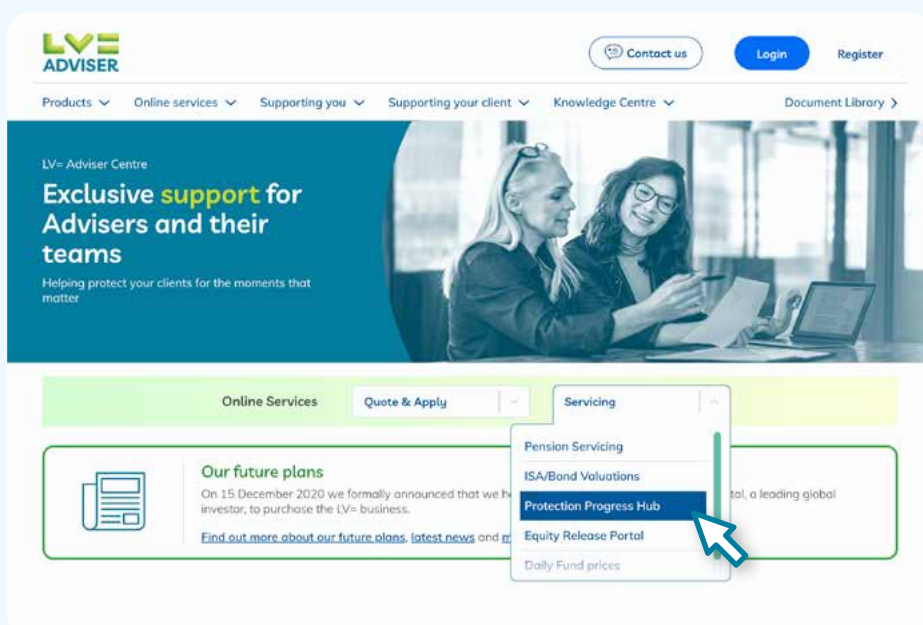
We're always keen to hear what you think about this online tool, so please use the feedback function within the Hub to let us know what you think.

Check the progress of your applications today

If you're already logged in to Fastway you can navigate directly to the Hub. If not, use the [link](#) in the Servicing drop down menu.

Not registered with LV= yet?

You can register from the Hub login page, or click the [Register](#) link at the top of the LV= Adviser home page.

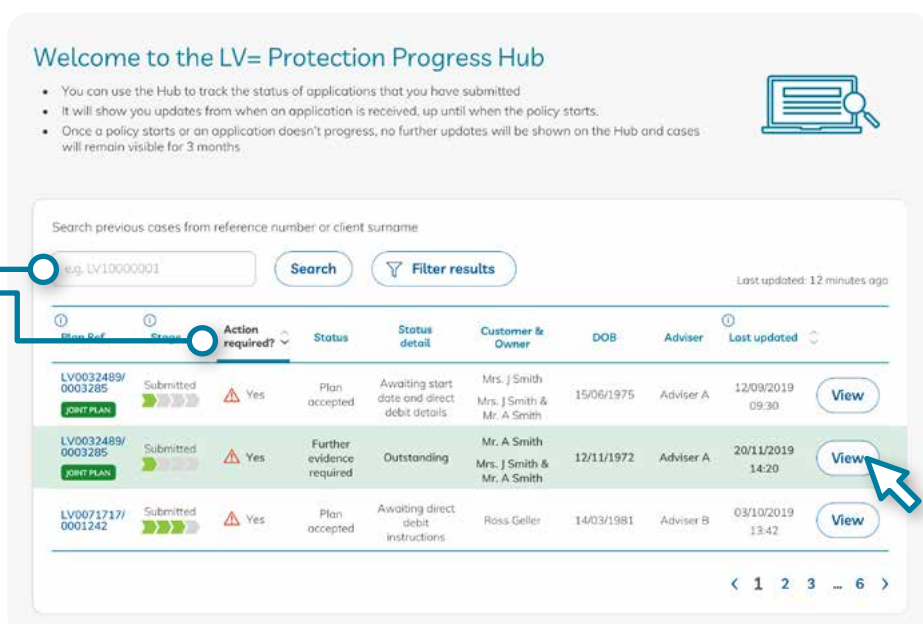


Protection Progress Hub dashboard

When you first log in, you'll land on the dashboard. This gives you an at a glance view of all your client applications that are in progress.

You can search by policy number or name, and also sort by Stage, Action required and Last updated columns.

Click on 'View' to see more details of an individual case.

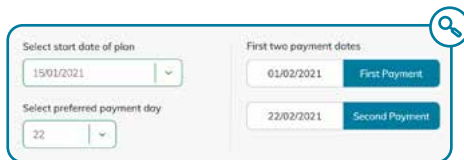


Track application activity

- Use the Quick links to navigate the detail page quickly and easily.
- Check the underwriting status and evidence that's been requested.

Collection Date Calculator

Use this simple tool to work out the first two premium collection dates.



The calculator interface includes two main sections. The first section, 'Select start date of plan', has a dropdown menu showing '15/01/2021' and a magnifying glass icon. The second section, 'First two payment dates', contains two rows. The first row has a date field '01/02/2021' and a button 'First Payment'. The second row has a date field '22/02/2021' and a button 'Second Payment'.

Download documents

Download your client's acceptance terms documents.

Add and amend client payment details

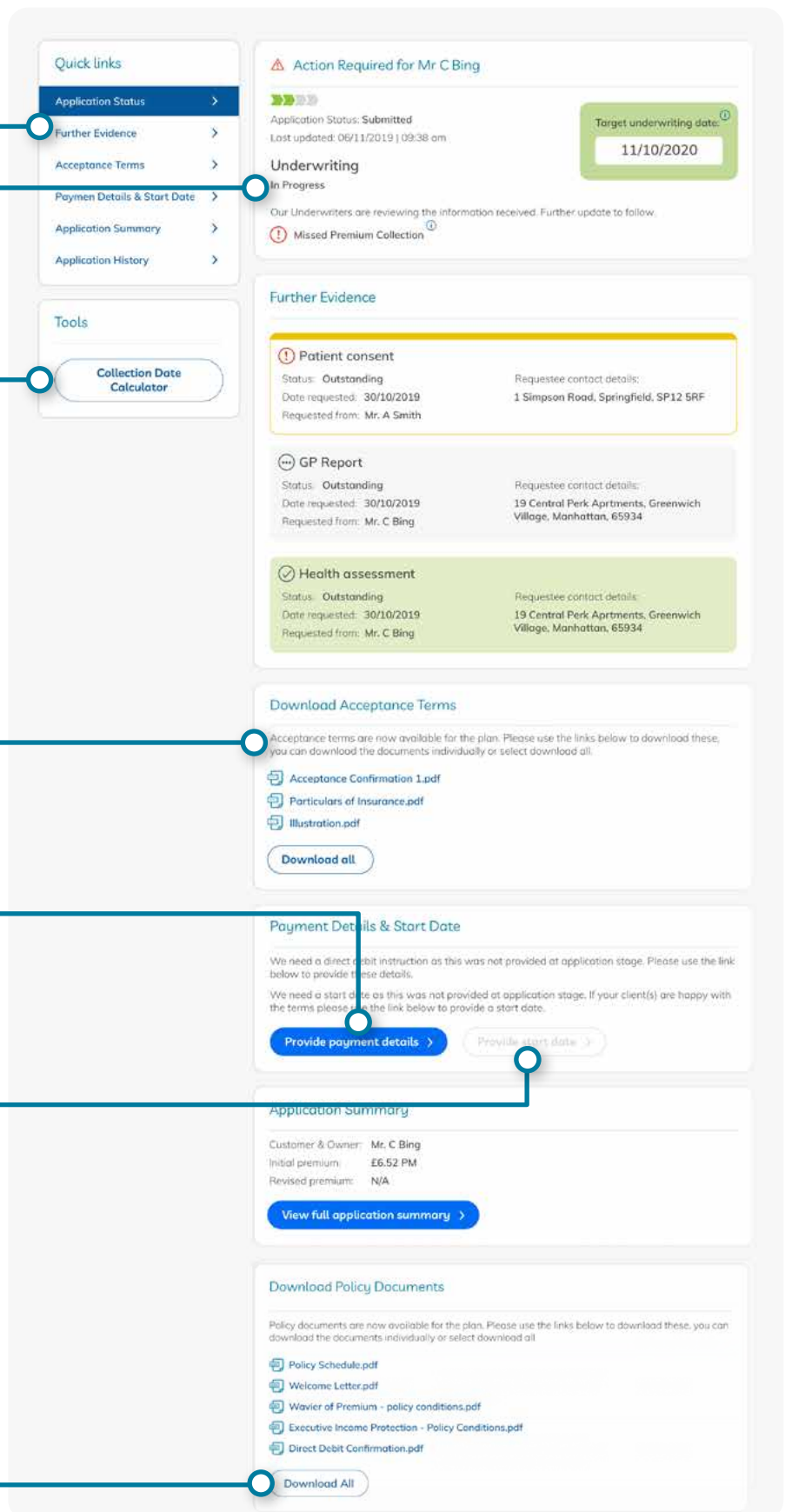
Click on the button and follow the steps to set up a direct debit and fill out your clients' bank account details.

Add a start date

Once payment details have been submitted, click on the button and follow the simple instructions to set the policy start date.

Download Policy Documents

For policies that have completed, it's now possible to download all the relevant policy documents, or individual documents if required. They remain on the Hub for 90 days.



The main application hub interface is divided into several sections. At the top left is a 'Quick links' menu with options: 'Application Status', 'Further Evidence', 'Acceptance Terms', 'Payment Details & Start Date', 'Application Summary', and 'Application History'. Below this is a 'Tools' section with a 'Collection Date Calculator' button. The main content area starts with an 'Action Required for Mr C Bing' section showing 'Application Status: Submitted', 'Last updated: 06/11/2019 | 09:38 am', and a 'Target underwriting date: 11/10/2020'. Below this is an 'Underwriting In Progress' section with a 'Missed Premium Collection' warning. The 'Further Evidence' section lists three items: 'Patient consent' (Status: Outstanding, Date requested: 30/10/2019, Requested from: Mr. A Smith), 'GP Report' (Status: Outstanding, Date requested: 30/10/2019, Requested from: Mr. C Bing), and 'Health assessment' (Status: Outstanding, Date requested: 30/10/2019, Requested from: Mr. C Bing). The 'Download Acceptance Terms' section lists three documents: 'Acceptance Confirmation 1.pdf', 'Particulars of Insurance.pdf', and 'Illustration.pdf', with a 'Download all' button. The 'Payment Details & Start Date' section contains instructions and two buttons: 'Provide payment details' and 'Provide start date'. The 'Application Summary' section shows details for 'Mr. C Bing' with initial premium of £6.52 PM and revised premium of N/A, with a 'View full application summary' button. The 'Download Policy Documents' section lists six documents: 'Policy Schedule.pdf', 'Welcome Letter.pdf', 'Waiver of Premium - policy conditions.pdf', 'Executive Income Protection - Policy Conditions.pdf', and 'Direct Debit Confirmation.pdf', with a 'Download All' button.

If you have any questions or comments about the Hub, please contact your usual [LV= Account Manager](#) or call us on **0800 032 4219**.

 www.LVadviser.com/PPH



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