

IRISH LIFE HEALTH LIVE USER GUIDE FOR BROKERS

This user guide will help our brokers to navigate and use our Irish Life Health Live application.

V3.1
September 2023



Welcome to Irish Life Health Live

This portal is for Providers, Brokers & Scheme Administrators only

Login email

Password

[Forgot password?](#)

Login →

Not registered? [Register here](#)

Irish Life Health Member portal

Members can login to their portal here.

Login →

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Version control

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1 Introduction

The Irish Life Health Live application is designed to enable brokers to manage their schemes and/or individual policies. The functionality includes giving you – as an Irish Life Health broker – the ability to:

- Purchase new policies and add members to your schemes and/or individual policies;
- View your member listings, activities and financial statements;
- View your members' policy details and some of your members' documents;
- View your members' policy premium details;
- View your members' policy activity history;
- Edit some of your members' policy details;
- Change your members' cover; and
- Manage your own Irish Life Health Live user access.

The Irish Life Health Live application is a software application that enables you to service your members and manage your book of policies. Learning to use it is easy, but it assumes that you are familiar with the health insurance regulatory framework governing private health insurance in the Republic of Ireland.

This user guide presents an overview of the application's features and gives step-by-step instructions for completing a variety of tasks.

The link to this application is: www.irishlifehealth.ie/portal/ilhlive

2 Registering as an Existing User

Note	<ul style="list-style-type: none">a) This is a once-off step to register for the Irish Life Health Live portal for existing portal users. All existing broker portal users must re-register unless they have an existing Irish Life Health member portal account. If you have an existing member portal account and are using the same email address for both applications follow the notes in point (b) below.b) Important: you may have already used the same email address to log in to the Irish Life Health member portal to access your own health policy as a customer. If you have, and are using the same email address for this Irish Life Health Live application, you do not need to re-register. Simply login using the email address and password you use for the member portal and enter your broker member number to access your portfolio of customers on the Irish Life Health Live application.c) If you do not have an Irish Life Health member portal account or you use a different email address to access your member portal from what you use as a broker to access your broker portal, please follow the steps below to register.d) Irish Life Health have introduced an extra step for our brokers to access your Irish Life Health portals to ensure every step is taken to keep all data stored safe and secure. The following slides are a step-by-step guide on how to set up multi factor authentication (MFA) if required.
-------------	---

2.1	Enter the Irish Life Health Live address in your addresss bar and press Enter.
2.2	Enter your: <ul style="list-style-type: none"> • Email address • Create a password that matches the requirements listed: <ul style="list-style-type: none"> ○ At least 8 characters ○ Uppercase, lowercase & numbers ○ At least one special character
2.3	Click Register account.

Welcome to Irish Life Health Live
This portal is for Providers, Brokers & Scheme Administrators only

Register your online account

Login email

The email address must be the one we have on file for your organisation

Your password must consist of:

- At least 8 characters
- Uppercase, lowercase and numbers
- At least 1 special character

Password

Confirm Password

Register account

Notes The email address being used to register must match what Irish Life Health has on record for you as a broker.



Welcome to Irish Life Health Live

This portal is for Providers, Brokers & Scheme Administrators only

Register your online account

Login email

The email address must be the one we have on file for your organisation

Your password must consist of:

- At least 8 characters
- Uppercase, lowercase and numbers
- At least 1 special character

Password

Confirm Password

Register account



Welcome to Irish Life Health Live

This portal is for Providers, Brokers & Scheme Administrators only

We have sent you a confirmation email. Please click 'Confirm your email' to access your account.

Login email

Password

[Forgot password?](#)

Login →

Not registered? [Register here](#)

Irish Life Health Member portal

Members can login to their portal here.

Login →



Confirm Your Email

Hi there,

You recently opened an Irish Life Health online account.

Please confirm your account by clicking this link:

Confirm your email

If you did not register an account, please ignore this email or contact support if you have questions:

Email heretohelp@irishlifehealth.ie or call us on 01 562 5100.

Yours sincerely,

Irish Life Health

Copyright © 2019 Irish Life Health



Welcome to Irish Life Health Live

This portal is for Providers, Brokers & Scheme Administrators only

We have sent you a confirmation email. Please click 'Confirm your email' to access your account.

Login email

JennMFA@test.ie

Password

.....



[Forgot password?](#)

Login →

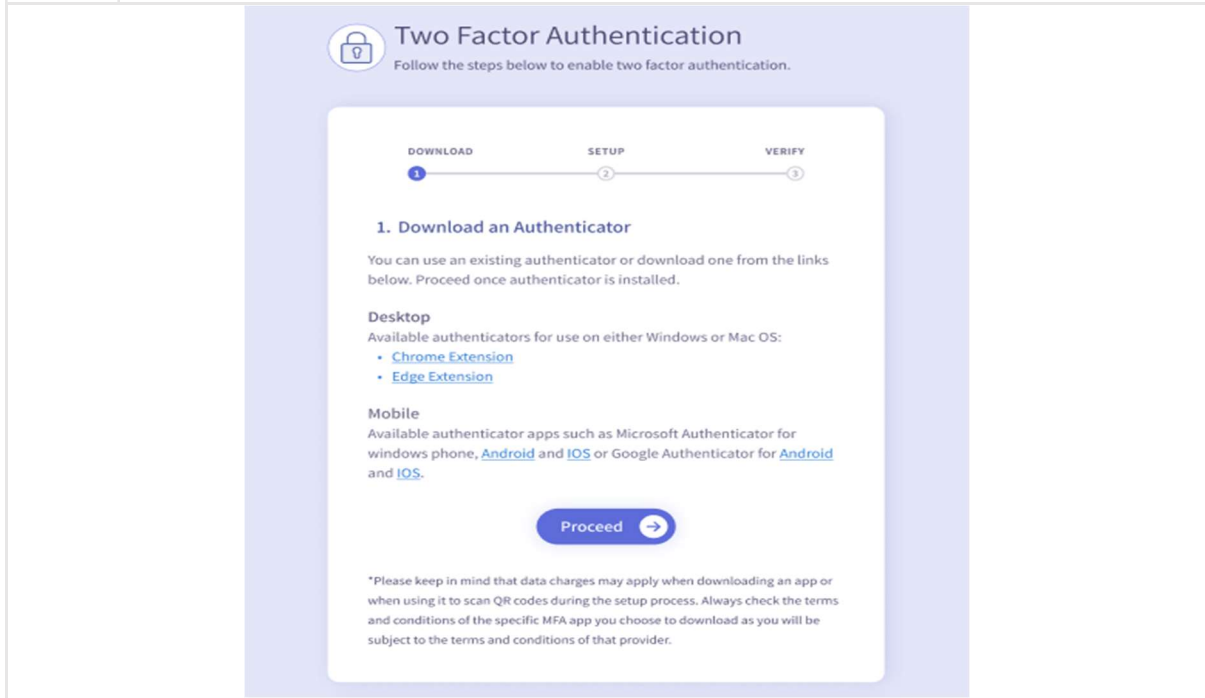
[Not registered? Register here](#)

Irish Life Health Member portal

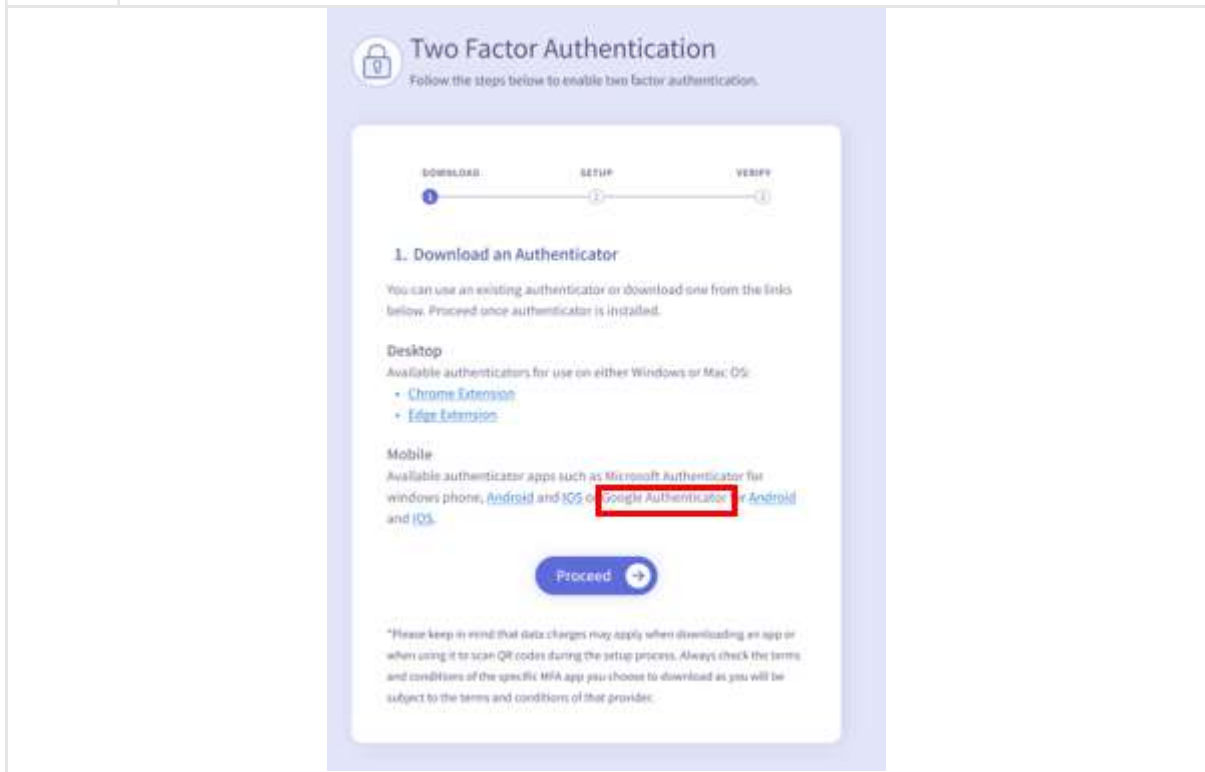
Members can login to their portal here.

Login →

- 2.4** When logged in you will be prompted to complete the setup of a two-factor authenticator.
This is a one time setup process.
- If you already have an authenticator you can proceed to the next step.
 - If you don't have an authenticator, follow steps to download.

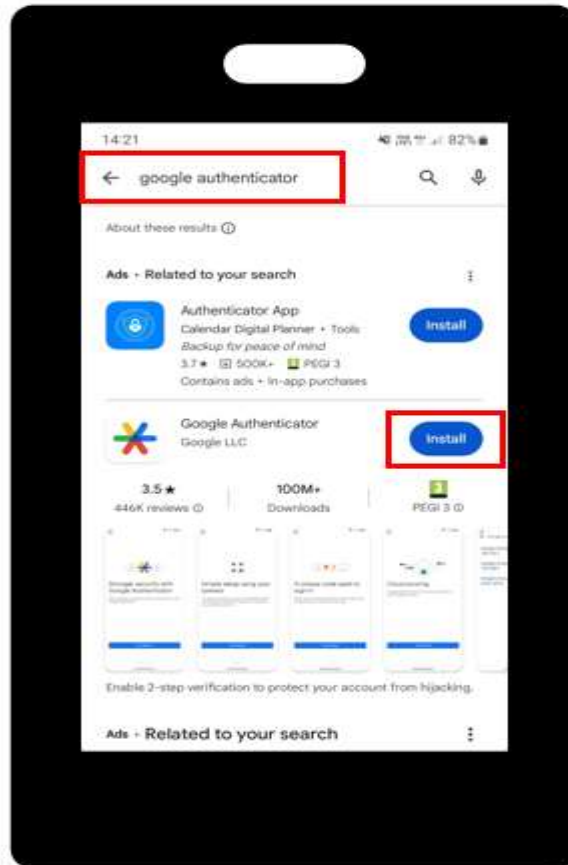


- 2.5** For the purpose of this guide we progress with a mobile device, Google Authenticator setup



N.B. Whichever authenticator app you choose, you will be subject to the Terms of Use of that provider.

2.6 Download the authenticator on your mobile device.



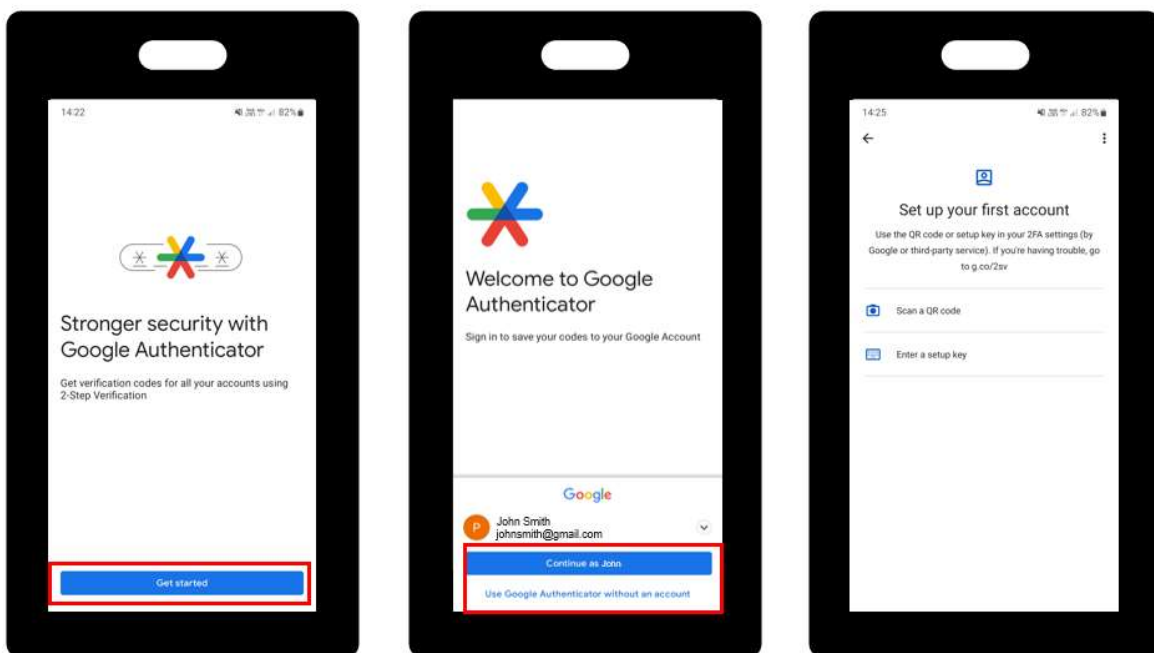
2.7 Open the app store on your mobile device, search for “Google Authenticator” and Install.

2.8 Download the authenticator on your mobile device.

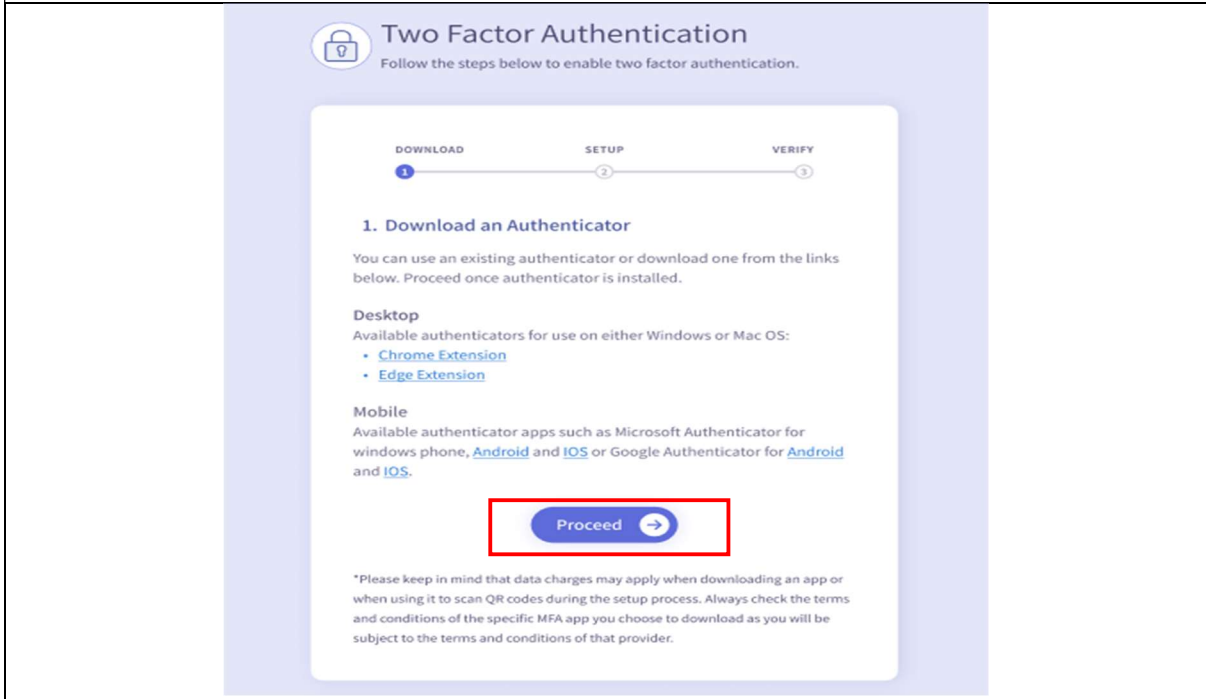
Open the app and select “Get started”.

Next login with an either:

1. An existing Google account, or
2. “Use Google Authenticator without an account”

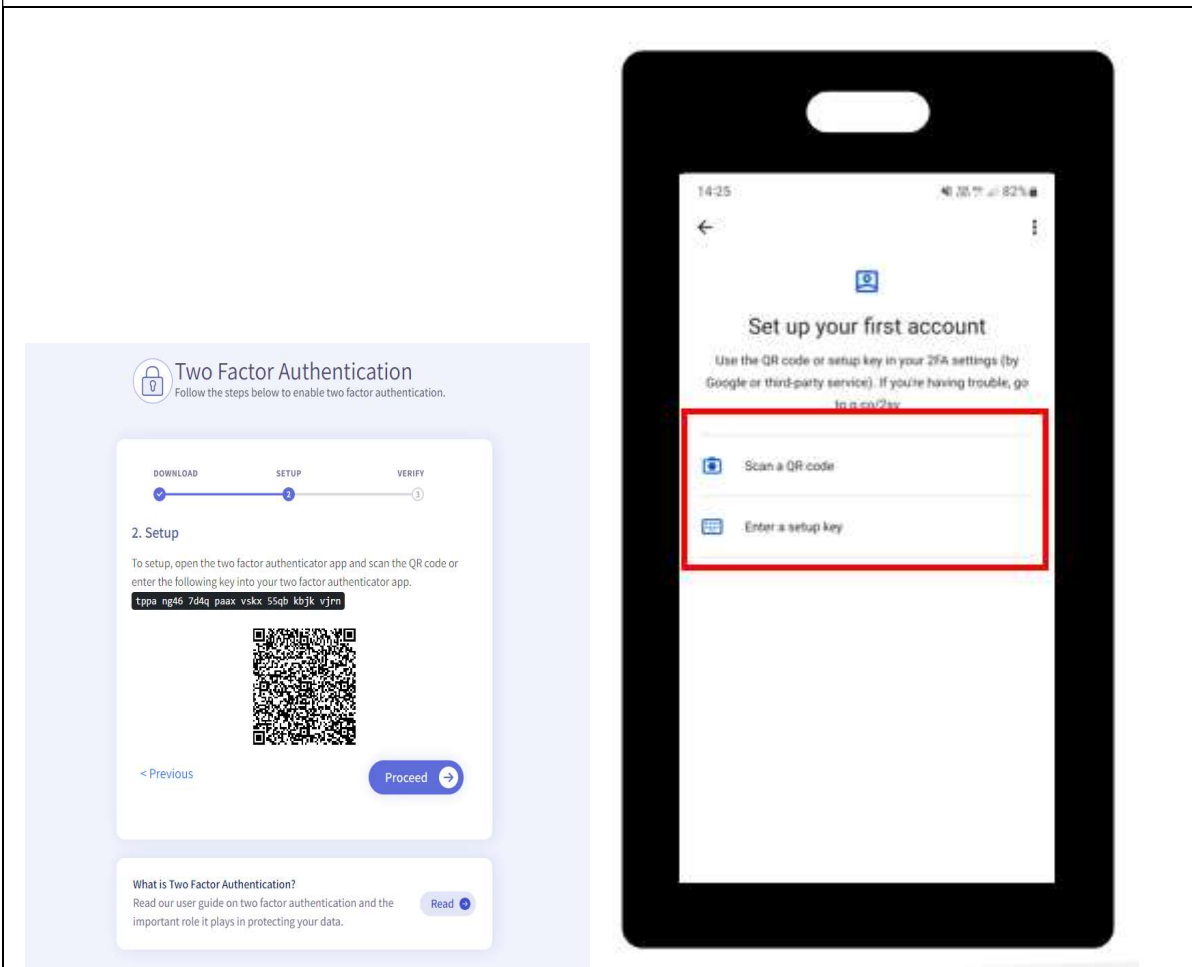


2.9 Success. You have downloaded the authenticator to mobile.
Click “Proceed” to progress to the Setup stage.



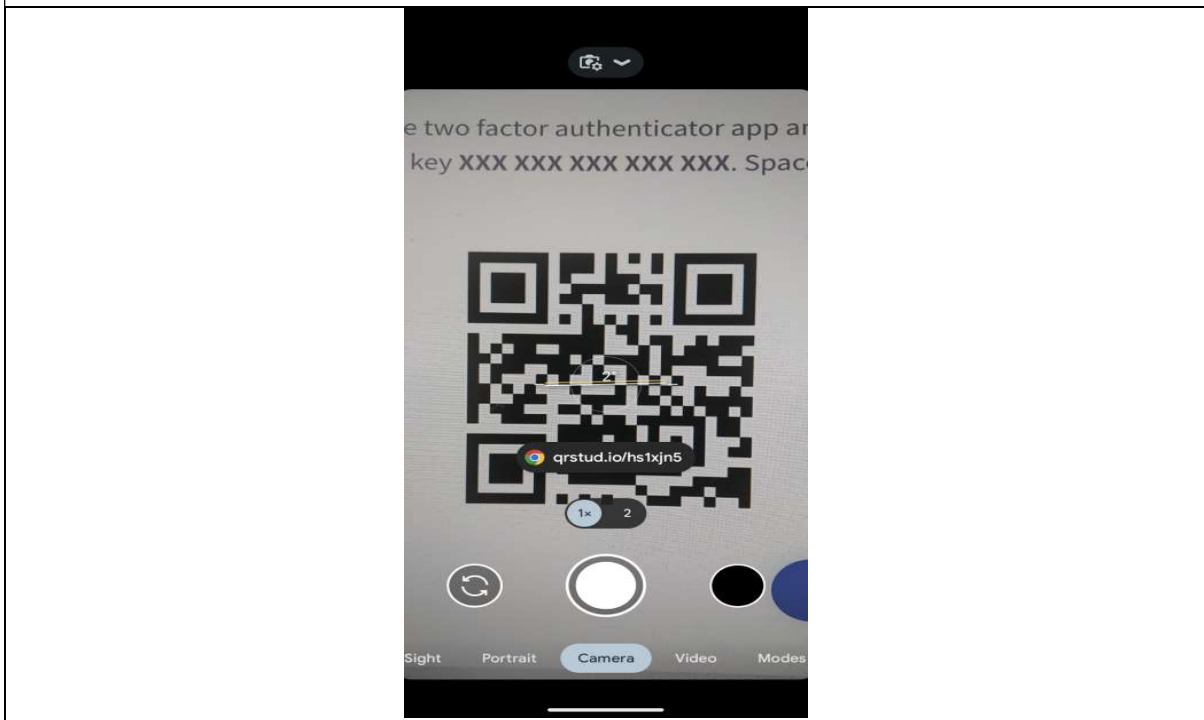
2.10 You can setup the authenticator by:

1. Scanning the QR code, or
2. Manually entering the 32-digit secret key



2.11 QR Code Option.

Select "Scan a QR code" and give the app the appropriate permissions to use the camera. Use your mobile device to scan the QR code on the portal Two Factor Authentication setup screen.

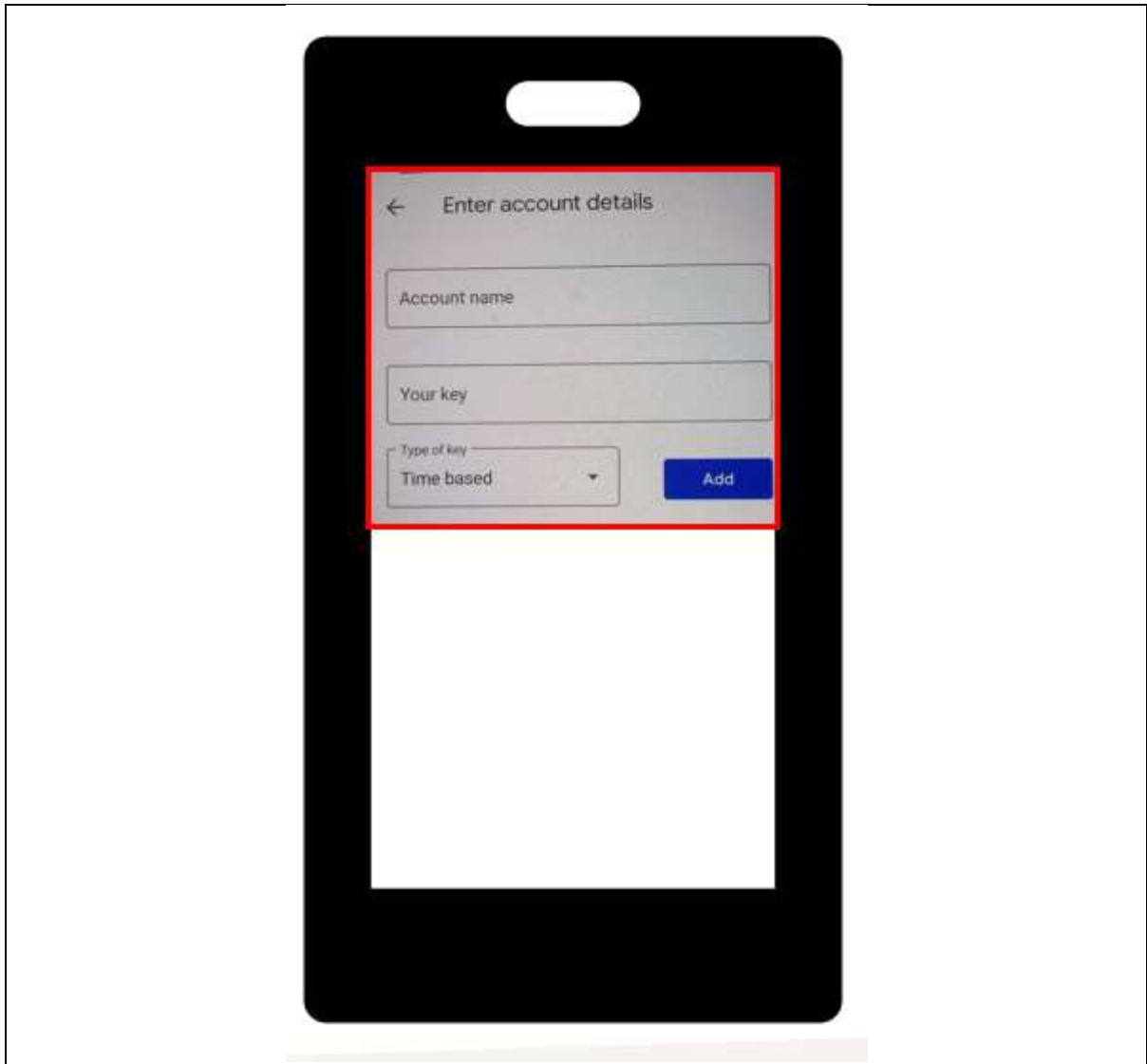


2.12 Setup the authenticator [Manual Option]

Select "Enter a setup key" option

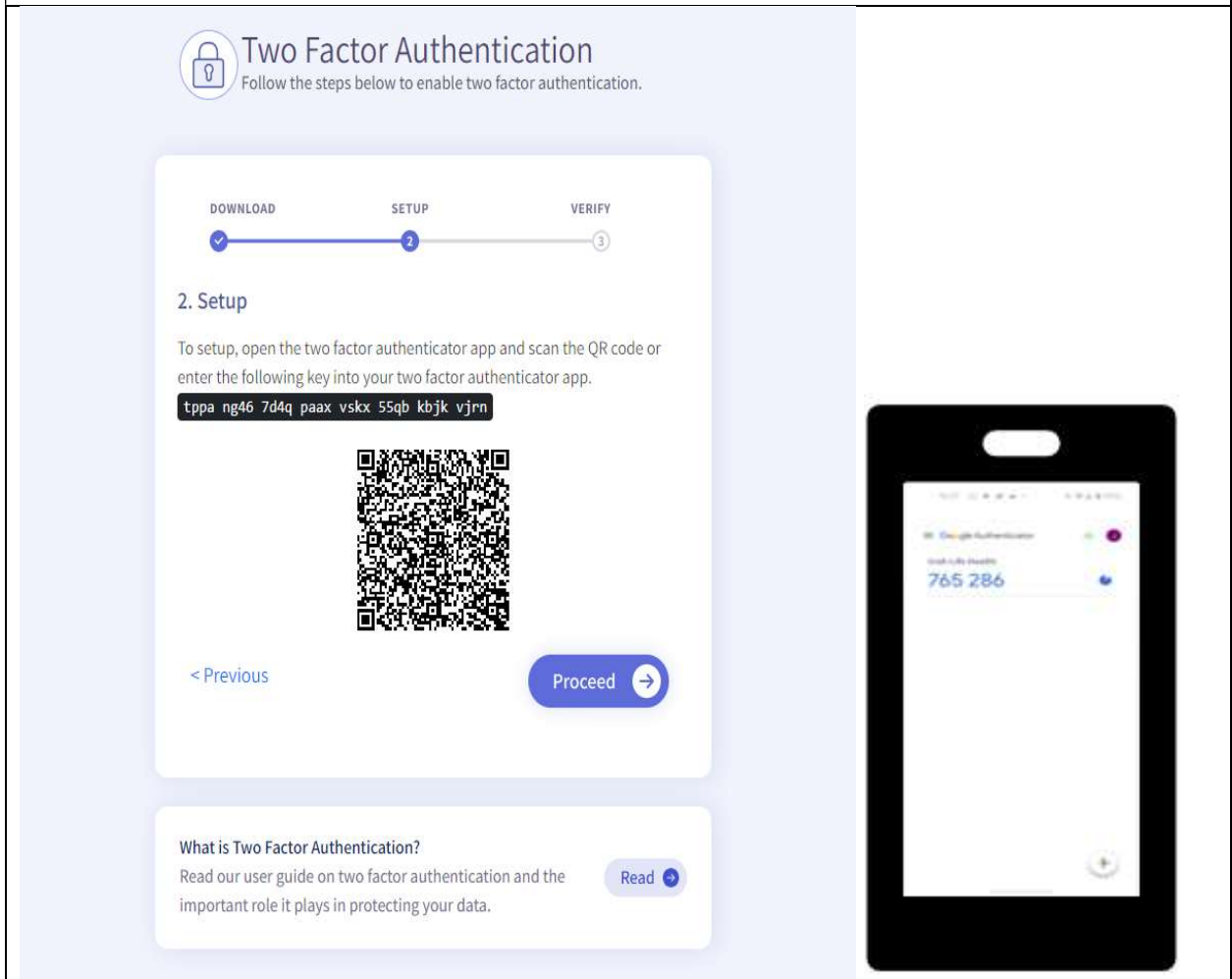
Enter the account details requested and click Add.

- **Account Name:** "Irish Life Health Live"
- **Your Key:** Enter the 32-digit secret key from the setup page
- **Type of Key:** Time based



2.14 Success. You have setup the authenticator.

The authenticator will immediately show a 6-digit code which will refresh periodically. Click "Proceed" to move to the Verify screen.



2.15 Enter the 6-digit authentication code into the verification code box on the Verify screen and select “Submit”.

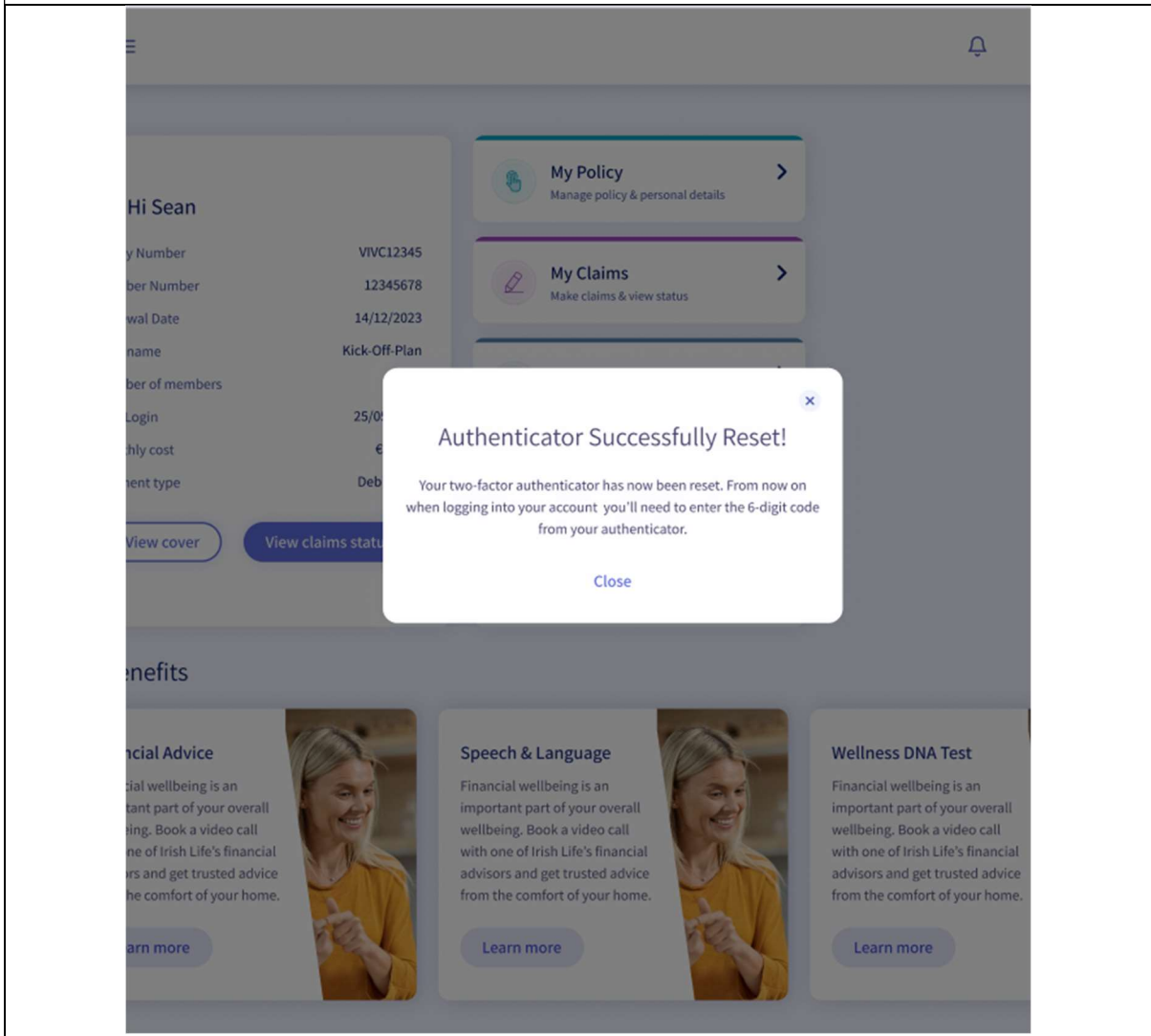
If there is an error:

1. Retry, confirming the correct digits are input, which match the code on the authenticator at the time of submission.
2. Go to the previous page and re setup the authenticator.

The image shows a composite view of the Two Factor Authentication process. On the left is a desktop-style verification screen titled "Two Factor Authentication" with the subtitle "Follow the steps below to enable two factor authentication." A progress bar shows three steps: "DOWNLOAD", "SETUP", and "VERIFY", with "VERIFY" being the active step. Below the progress bar, the heading "3. Verify" is followed by the instruction: "Once setup is complete, your two factor authenticator app will provide you with a unique code. Enter the code in the confirmation box below." A text input field labeled "Verification Code" contains the number "765286". At the bottom left of this section is a "< Previous" link, and at the bottom right is a blue "Submit" button. Below the verification section is a link titled "What is Two Factor Authentication?" with the text "Read our user guide on two factor authentication and the important role it plays in protecting your data." and a "Read" button with a right-pointing arrow.

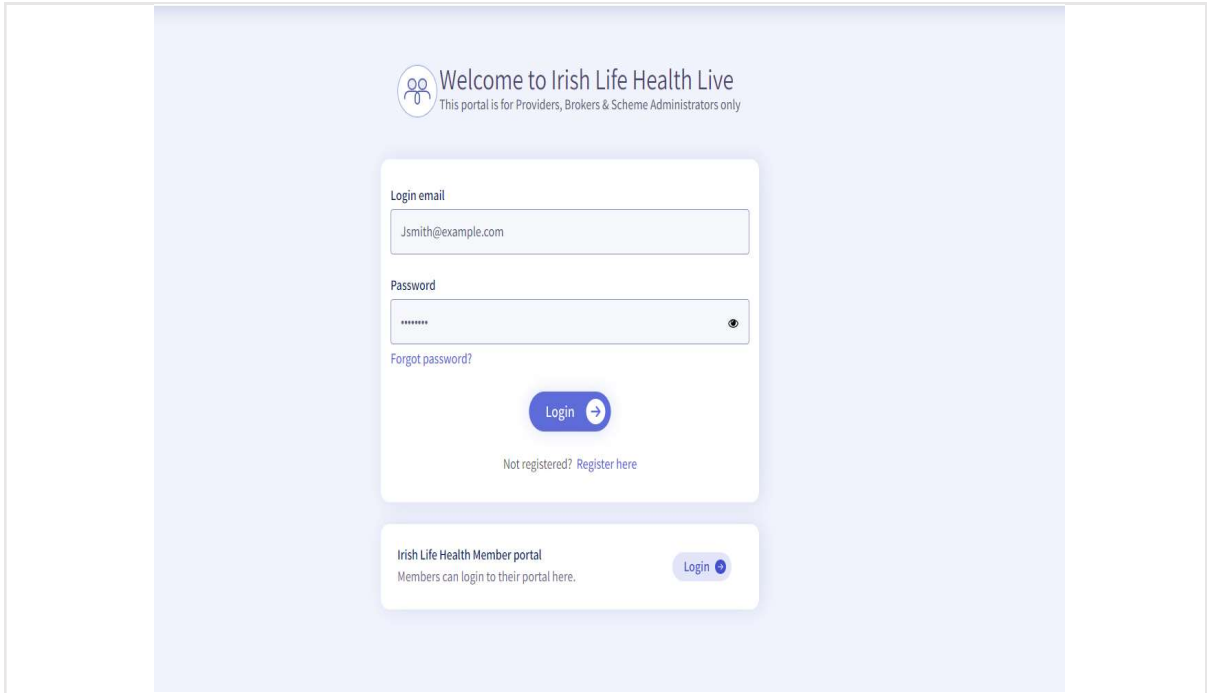
On the right is a mobile app interface for an "Authenticator" app. The app header shows "Irish Life Health" and a large blue "765 286" code. The app interface is partially obscured by a grey rectangle.

2.16 Success. You have verified the authenticator and this one-time setup is complete. Keep your authenticator safe as you will be required to enter the 6-digit authentication code every time you login.



The below is showing the set-up MFA on the Desktop.

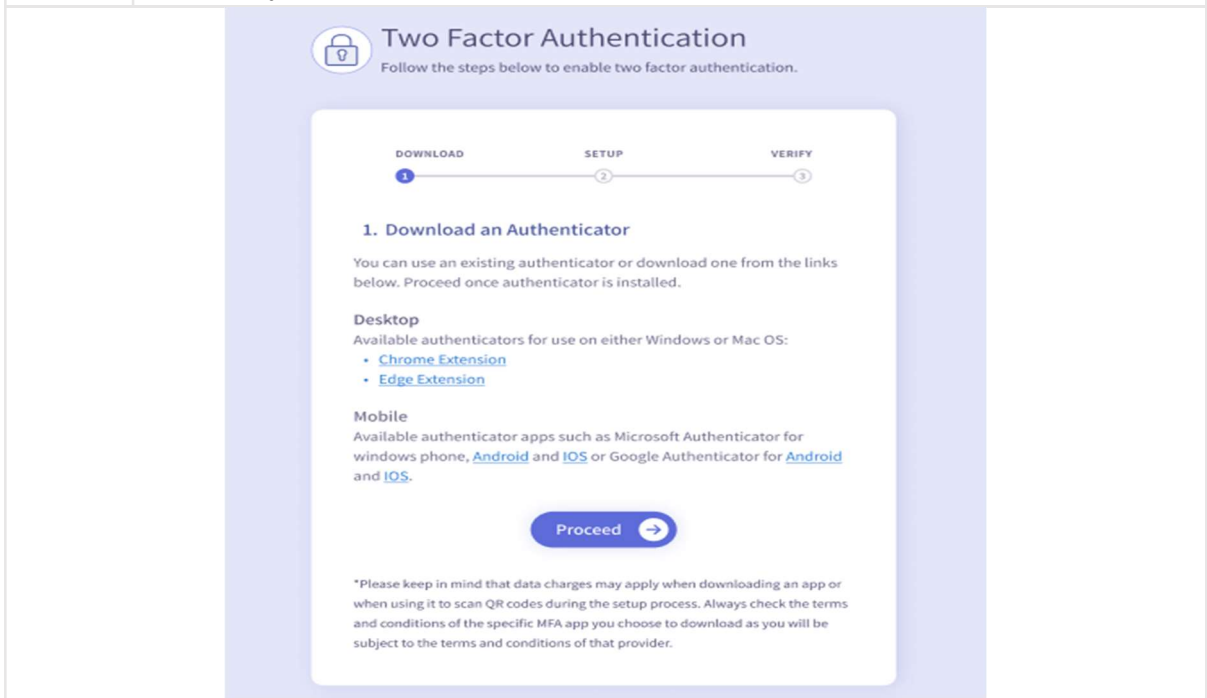
2	Login using your existing username and password as normal.
2.1	Enter your: <ul style="list-style-type: none"> • Email address • Password
2.2	Click Login.



Notes The email address being used to register must match what Irish Life Health has on record for you as a broker.

2.3 When logged in you will be prompted to complete the setup of a two-factor authenticator. This is a one time setup process.

- If you already have an authenticator you can proceed to the next step.
- If you don't have an authenticator, follow steps to download.



2.4 For the purpose of this guide we will select the Desktop, Chrome Extension.

Two Factor Authentication

Follow the steps below to enable two factor authentication.

1. DOWNLOAD 2. SETUP 3. VERIFY

1. Download an Authenticator

You can use an existing authenticator or download one from the links below. Proceed once authenticator is installed.

Desktop
Available authenticators for use on either Windows or Mac OS:

- [Chrome Extension](#)
- [Edge Extension](#)

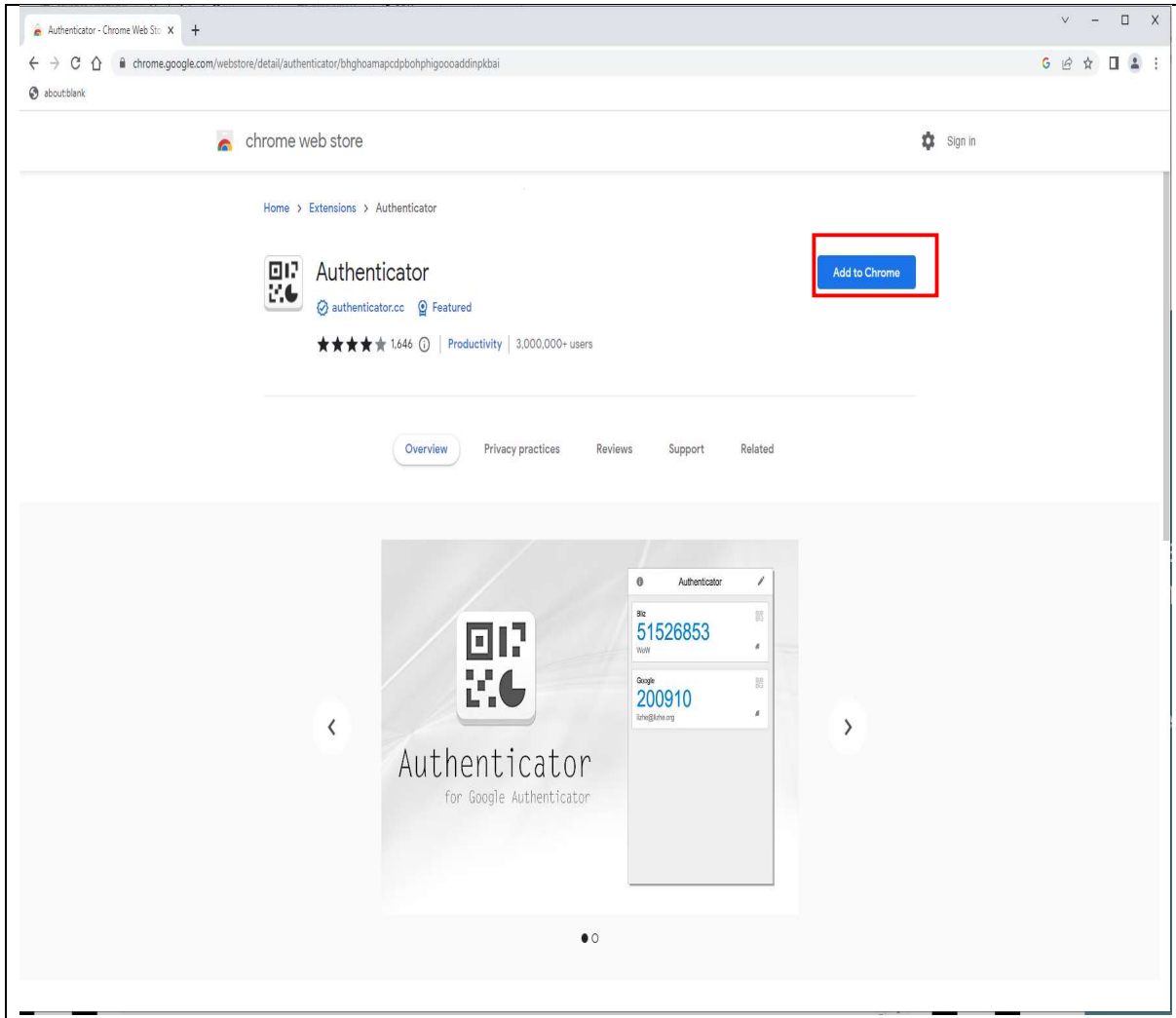
Mobile
Available authenticator apps such as Microsoft Authenticator for windows phone, [Android](#) and [IOS](#) or Google Authenticator for [Android](#) and [IOS](#).

[Proceed](#) →

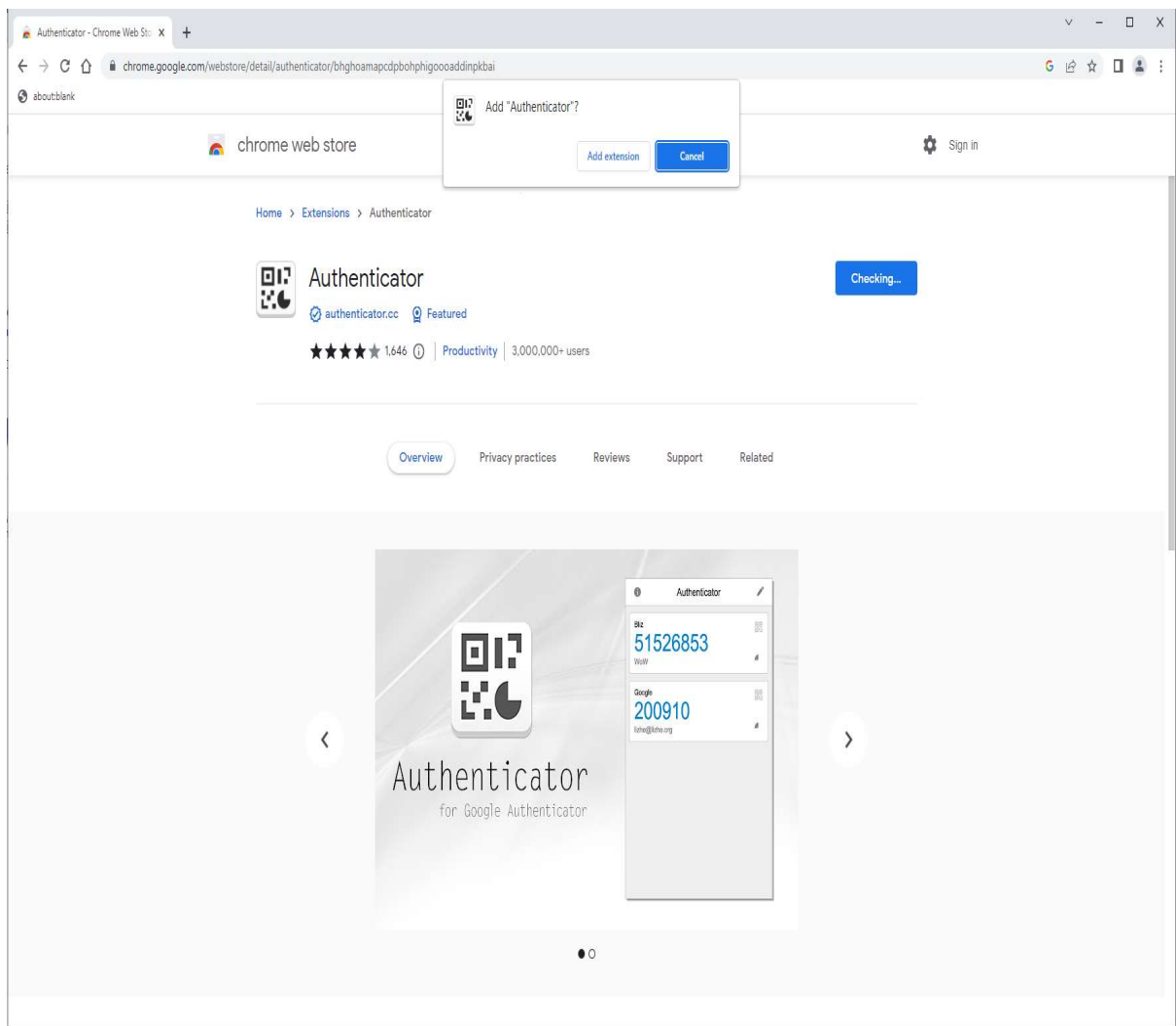
*Please keep in mind that data charges may apply when downloading an app or when using it to scan QR codes during the setup process. Always check the terms and conditions of the specific MFA app you choose to download as you will be subject to the terms and conditions of that provider.

N.B. Whichever authenticator app you choose, you will be subject to the Terms of Use of that provider.

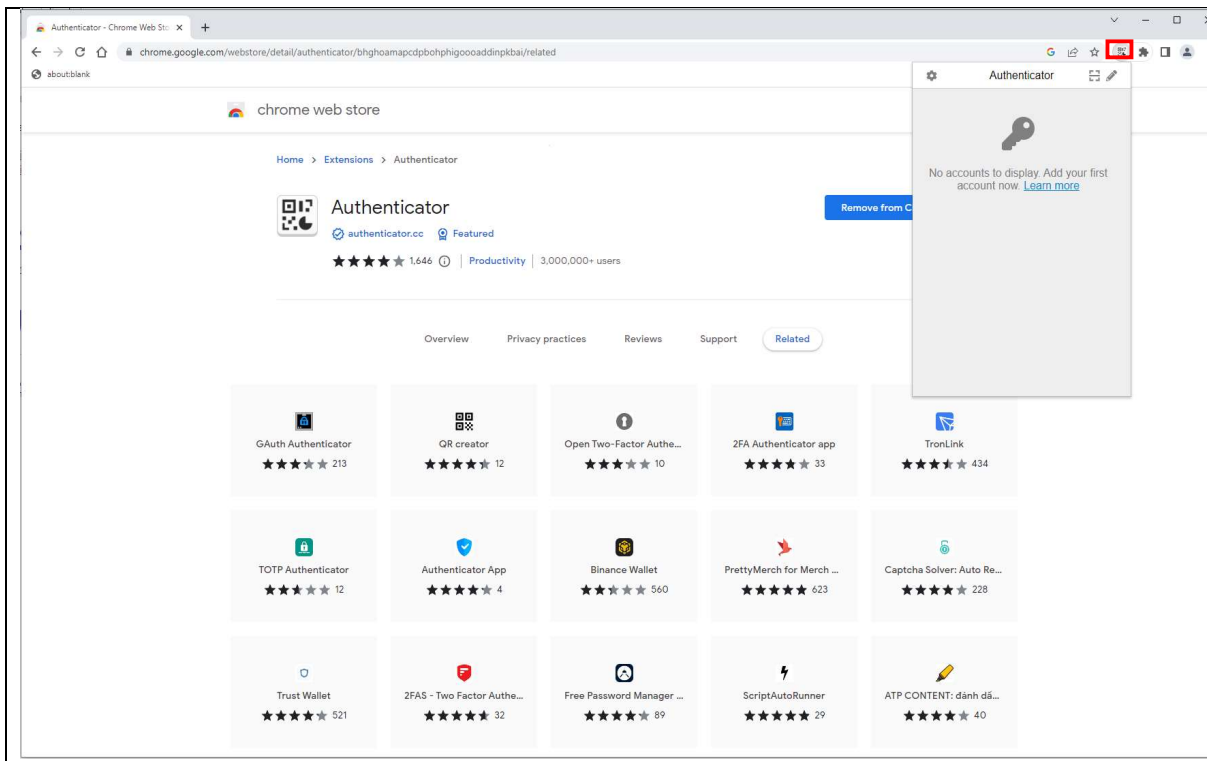
2.5 The download page for the Chrome extension will open from the link.
Select the blue “Add to Chrome” button on screen.



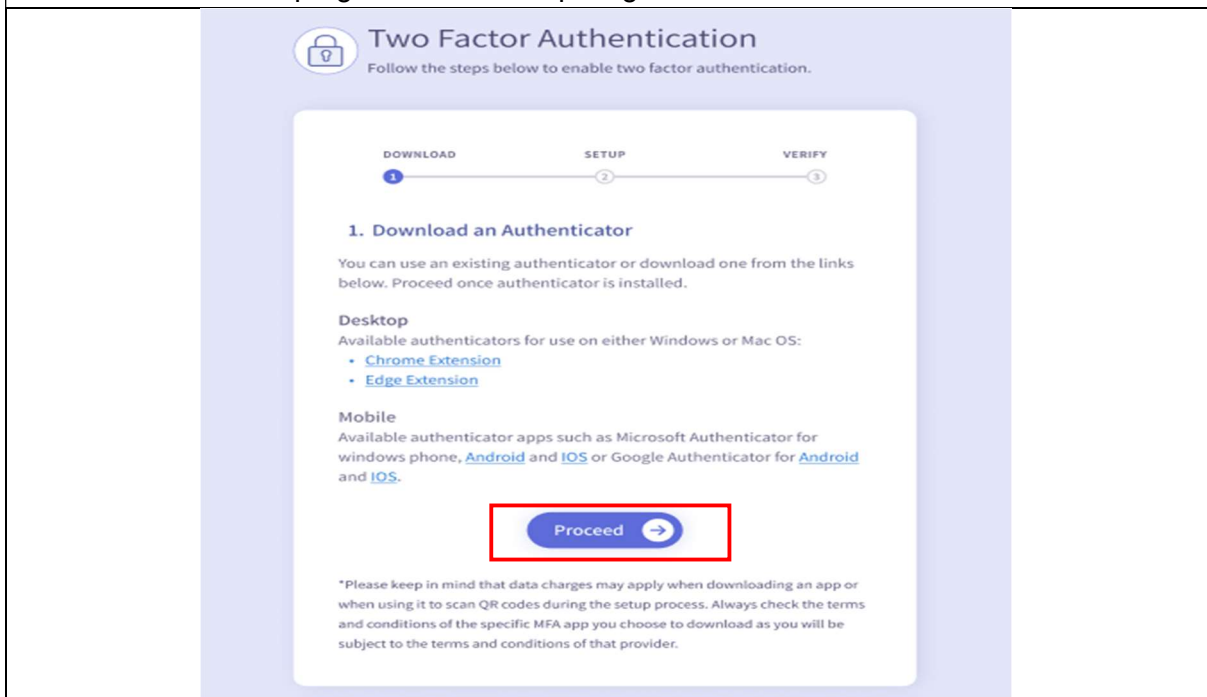
- 2.6 Download the authenticator extension to your desktop.
Select the grey “Add Extension” button in the pop-up screen.



2.7 To open, this can be found in the extension toolbar to the right of the address bar at the top of the screen.
Next you need to go back to the portal to complete setup.




2.8 Success. You have downloaded the authenticator to your desktop browser. Click “Proceed” to progress to the Setup stage.

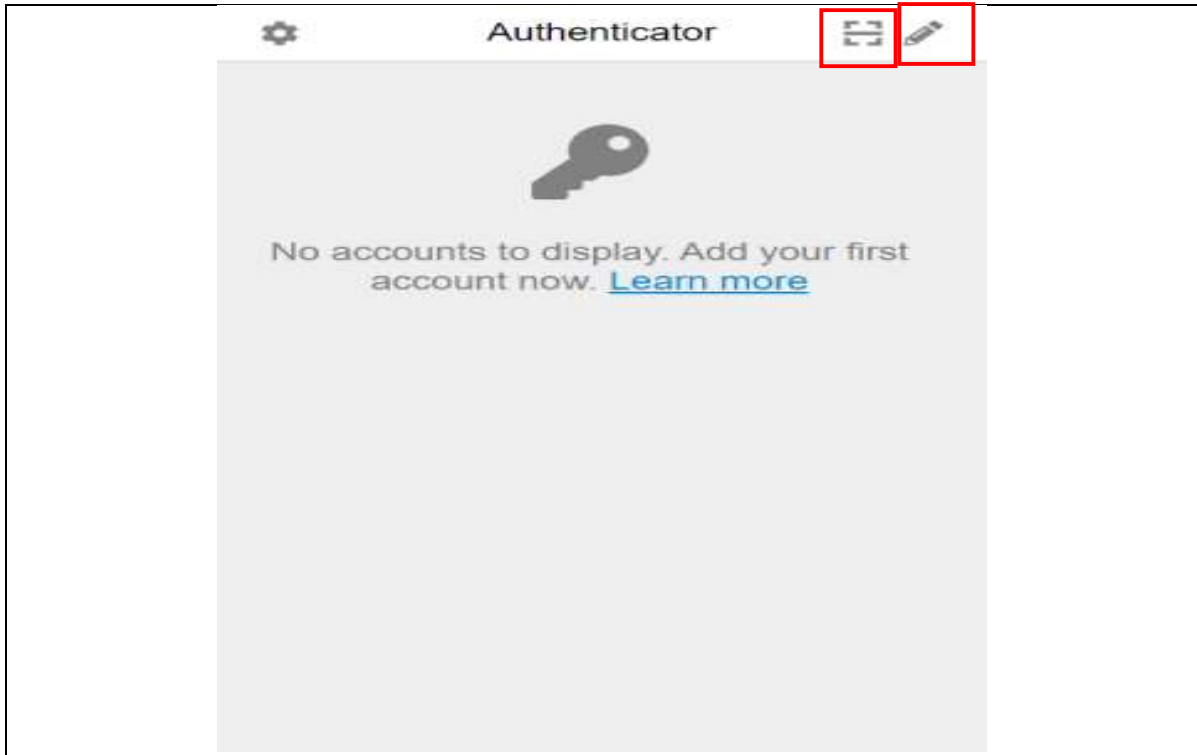


2.9 Navigate to the browser extension toolbar and open the authenticator. This can be found in the extension toolbar to the right of the address bar at the top of the screen.




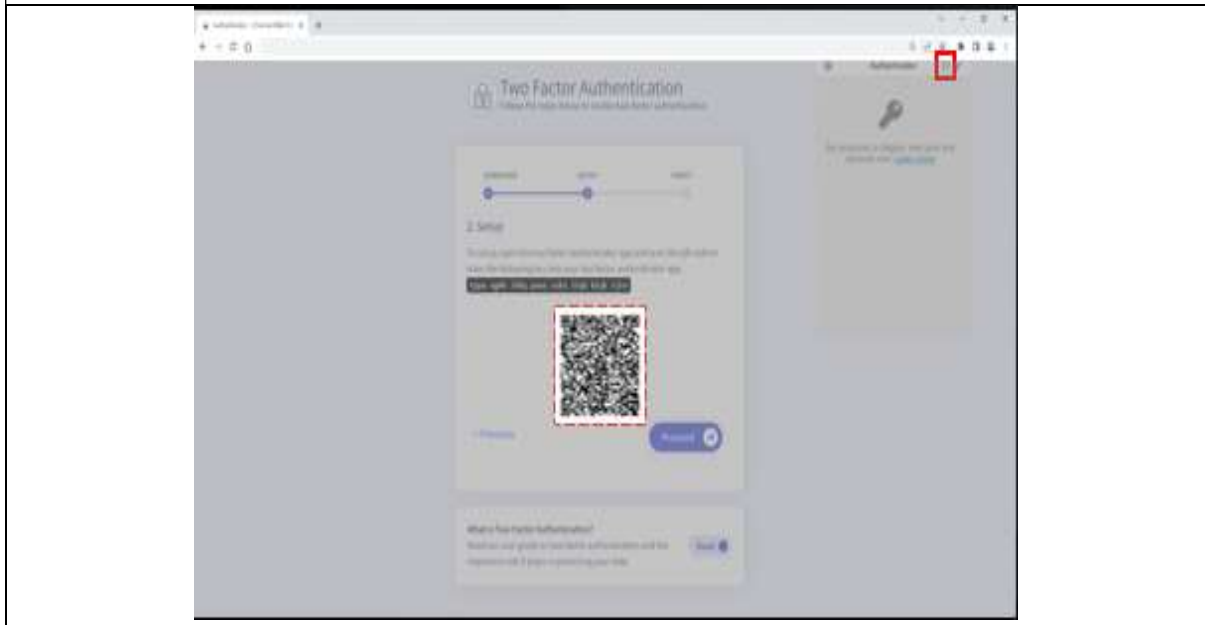
2.10 You can setup the authenticator by scanning the QR code or manually entering the 32 digit Secret Key.

- Click the  icon for the scan QR code setup option.
- Click the pen icon for the manual setup option.





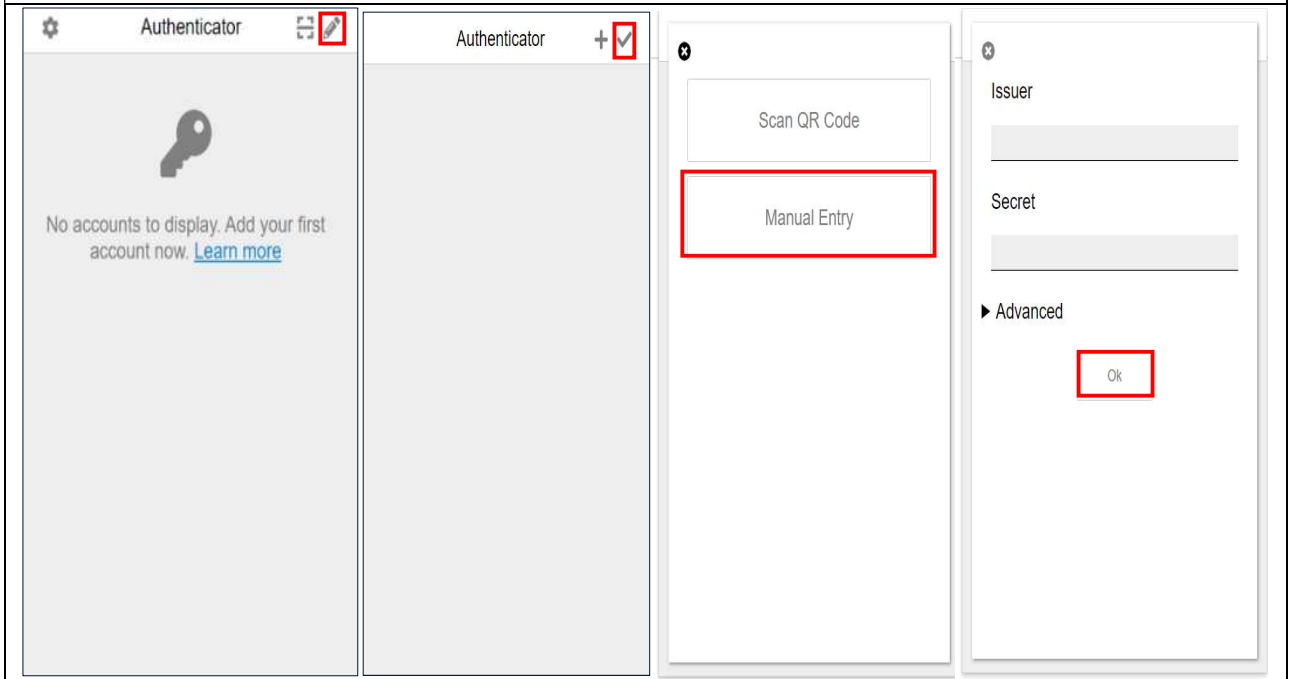
2.11 QR Code Setup.

Click the  icon in the authenticator toolbar to enable the scanning option. Select the QR code on screen by dragging the scanning square over the location of the code with your mouse as shown in the image.



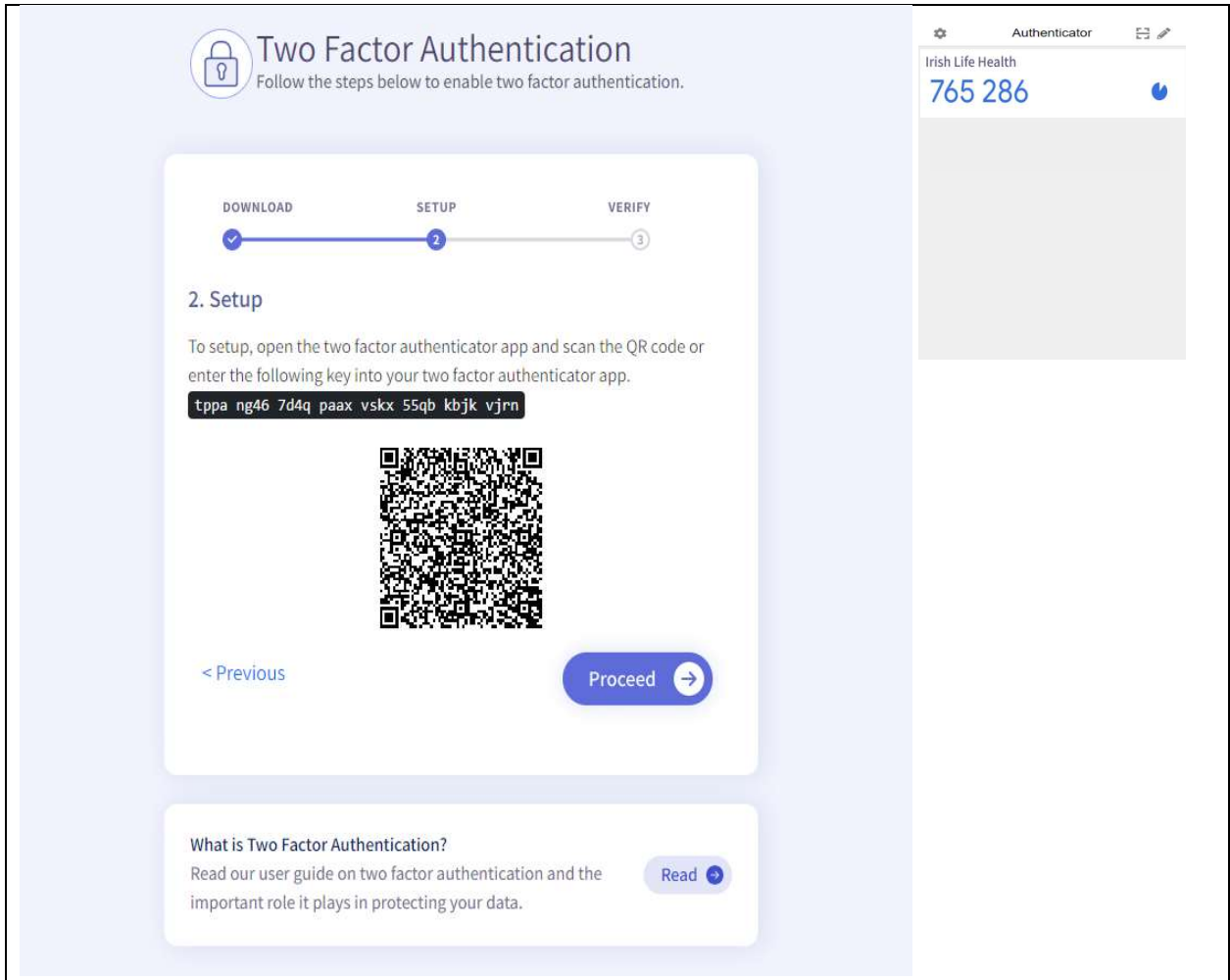
2.12 Manual setup.

1. Click 
2. Click 
3. Select "Manual Entry"
4. Fill details:
 - Issuer: "Irish Life Health Live"
 - Secret: Enter the 32 digit secret key from the setup page.
 - Click Ok



2.13 Success. You have setup the authenticator.

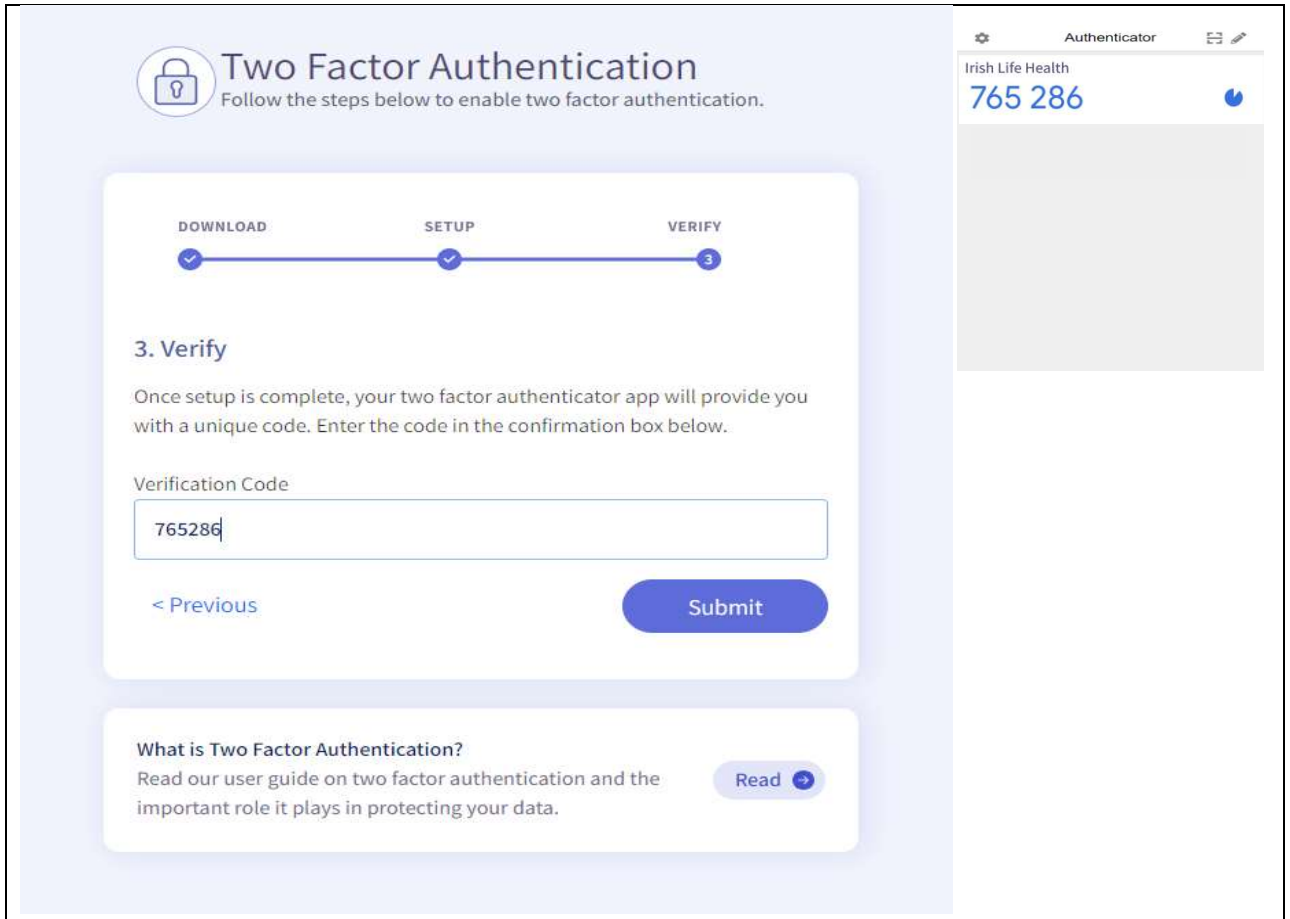
The authenticator will immediately show a 6-digit code which will refresh periodically. Click "Proceed" to move to the Verify screen.



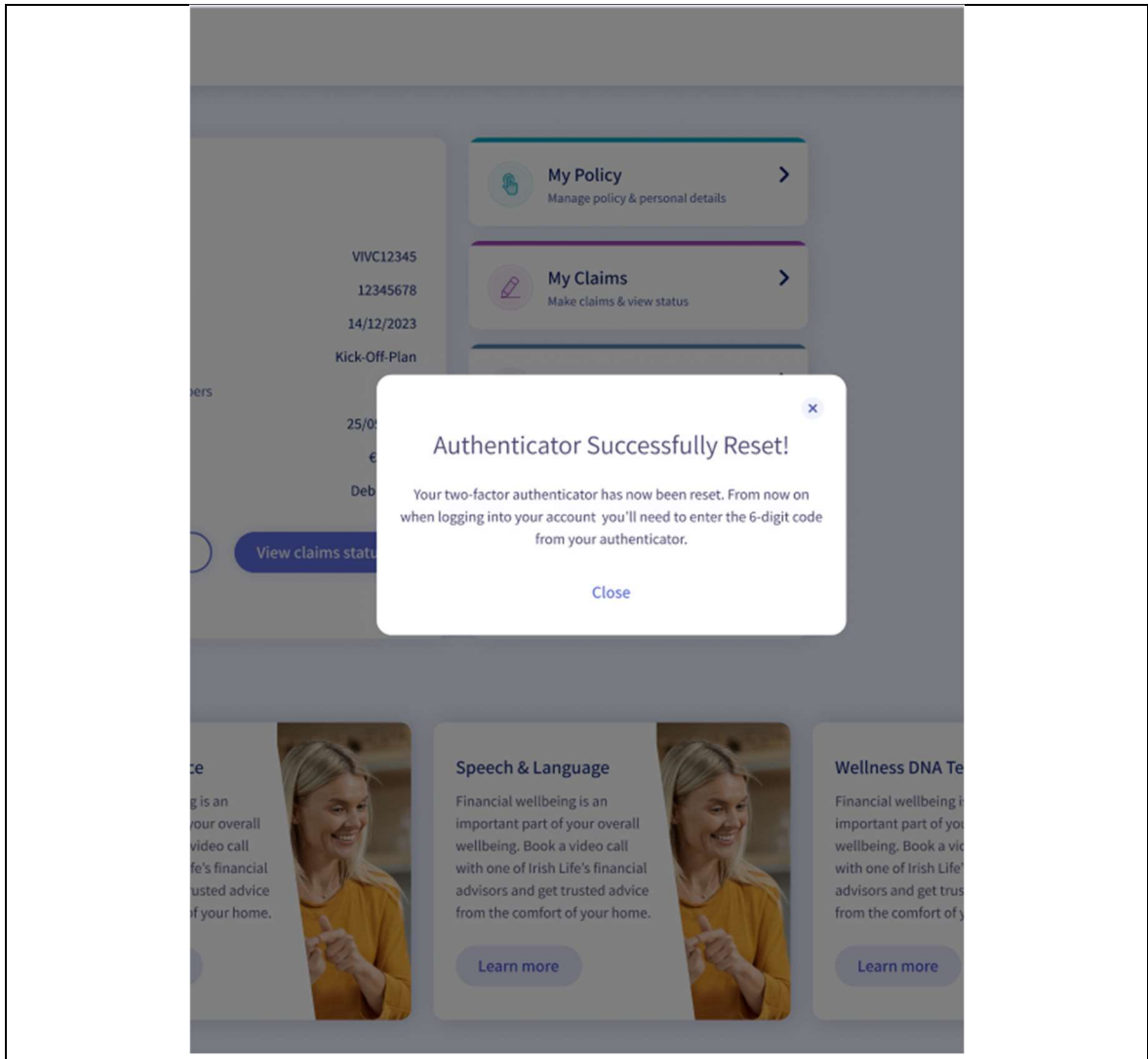
2.14 Enter the 6-digit authentication code into the verification code box on the Verify screen and select “Submit”.

If there is an error:

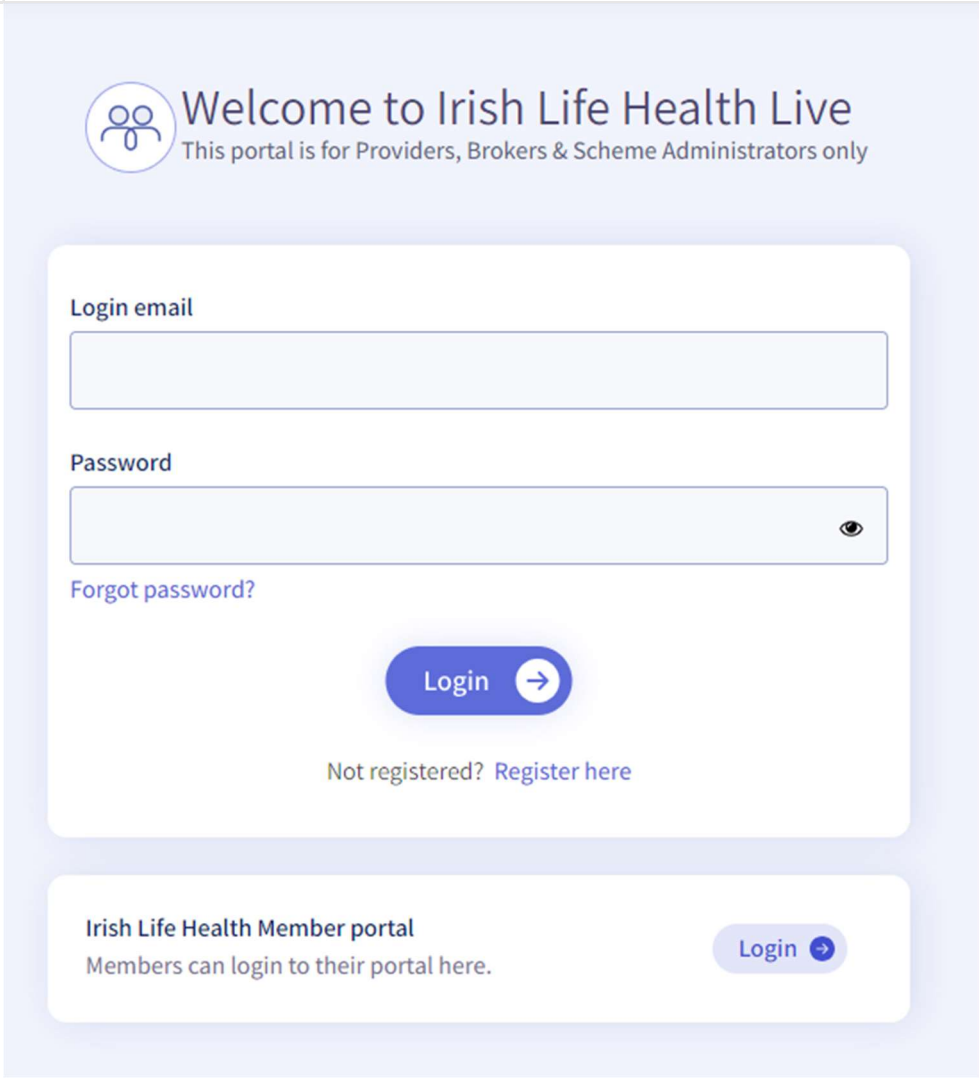
1. Retry, confirming the correct digits are input, which match the code on the authenticator at the time of submission.
2. Go to the previous page and re setup the authenticator.



2.15 Success. You have verified the authenticator and this one-time setup is complete. Keep your authenticator safe as you will be required to enter the 6-digit authentication code every time you login.



3 Logging in to Irish Life Health Live

Note	Enter the Irish Life Health Live address in your addresss bar and press Enter.
1	Make sure you are on the Login tab.
2	Enter your: <ul style="list-style-type: none">• Email address• Password
3	Click Login.
	
Note	If you have forgotten your password, use the Forgot password link to reset this.

4 Resetting your Password

Note	Enter the Irish Life Health Live address in your addresss bar and press Enter.
1	Make sure you are on the Login tab.
2	Click Forgot Password.

Welcome to Irish Life Health Live
This portal is for Providers, Brokers & Scheme Administrators only

Login email

Password

Forgot password?


Login →

Not registered? Register here

Irish Life Health Member portal
Members can login to their portal here.

Login →

3 Enter your Email Address and click Reset password.

 **Welcome to Irish Life Health Live**
This portal is for Providers, Brokers & Scheme Administrators only

Forgot your password?

Please enter the email address you wish to reset your password for.

Email address

Reset password

[Return to login](#)

4 Check your inbox for the password reset email and click Reset password.



Welcome to Irish Life Health Live

This portal is for Providers, Brokers & Scheme Administrators only

Check your email inbox

An email has been sent to JennMFA@test.ie with instructions on how to reset your password.

[Return to log in](#)



Password Reset Request

Hi there,
You recently requested to reset your password for your Irish Life Health online account.

Please reset your password by clicking here:

[Reset your password](#)

If you did not request a password reset, please ignore this email or contact support if you have questions:

Email heretohelp@irishlifehealth.ie or call us on 01 562 5100.

Yours sincerely,

Irish Life Health

5 Create a new password.
Confirm this too.

6 Click the Confirm button.

Set your new password

JennMFA@test.ie

Choose a new password:

Your password must consist of:

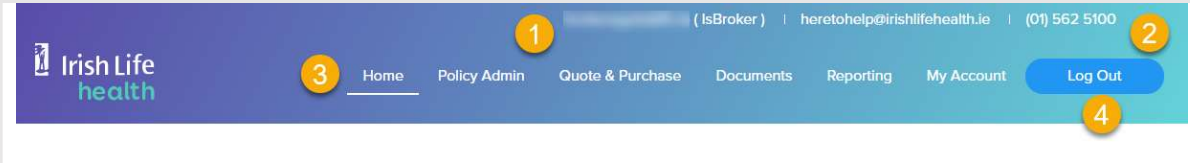
- at least 8 characters
- uppercase, lowercase & numbers
- at least one special character



[Back to log in](#)

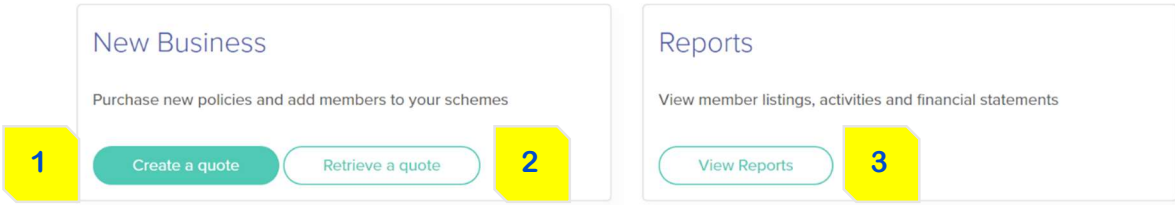
5 The Welcome or Home screen

The home page provides a convenient hub to the different parts of the Irish Life Health Live application.



1	Your user name.
2	The email address and contact numbers for our customer service teams.
3	Links to each page in the application (home, policy admin, quote & purchase, documents, reporting & my account).
4	Log Out button.

5.1 New Business and Reports

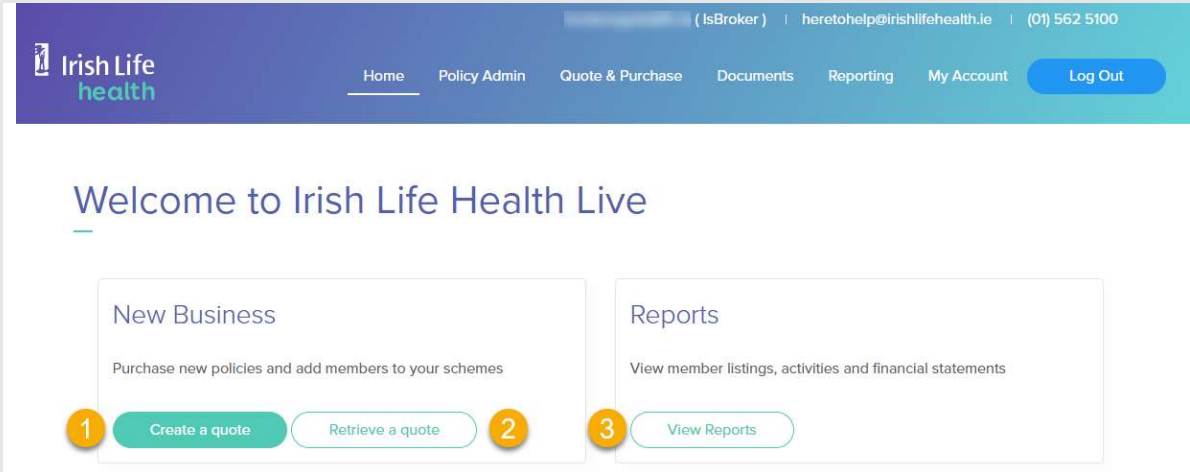


Under New Business

- 1 Click Create a Quote to jump from the home page to the Quote & Purchase page.
- 2 Click Retrieve a Quote to jump from the home page to the Quote & Purchase and a list of active new business quotes for your clients.

Under Reports

- 3 Click View Reports to jump from the home page to the Reporting page.



5.2 Search Policy

Search Policy

Policy Number Member Number Last Name and Date of Birth Staff Number

1	Enter a full (not a partial) policy number to search for a policy by policy number.
2	Click the Member Number radio button and enter a full member number in the Member Number box that will appear to search for a policy by member number.
3	Click the Last Name and Date of Birth radio button to open Last Name and Date of Birth fields to search for a policy by these criteria. The Date of Birth must be entered in the DD/MM/YYYY format.
4	Click the Staff Number radio button to open the Staff Number field.
5	Enter your search criteria and click the Find Policy button.
TIP	You can also search for all policies on a scheme on the Policy Admin page.

6 My Account

6.1 User Management

1	Click the My Account tab from the main menu to view the User Management area.
2	There are 2 tabs in this area – if you are logged in with ADMIN access: <ul style="list-style-type: none">• User management, and• My details With the User Management tab selected, you can search for existing users, update an existing user's details and/or create a new user.

Irish Life health

Home Policy Admin Quote & Purchase Documents Reporting My Account Log Out

My Account

User Management My Details

Manage all the users in your organisation and control their level of access

- ADMIN: grants the user full access to ILH Live
- AGENT: grants the user Policy Admin and Quote/Purchase access only.

Search Users

Name/Email Address Role

Search user by partial name/email ALL Search Reset

- 3** The My Details tab view shows your own details, templates for download and a list of schemes available under your account.
- 4** This page also gives you access to Useful Documents (the Health Remittance Template Excel).
- 5** You will also see a list of any schemes – where applicable.

My Account

User Management
My Details

My Details 3

Role
Broker

Member Number
[Redacted]

Name
[Redacted]

Address
Vcunjzqgsnfv Stbmmanv, Hncwa Abfra Urlyjx

Email
[Redacted]

Phone Numbers
[Redacted]

Useful documents 4

[Health Remittance Template \(Excel\)](#)

Schemes 5

Member No	Scheme Name (Code)	Scheme Group	Address	Broker	Scheme Admin	Scheme Admin Email Address	Scheme Admin Contact Details	PO Number	Pay Frequency	Dates
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]

Prev
1
2
3
4
5
...
25
26
Next

6.1.1 Search for existing Users

1	With the User Management tab selected, type the user email address or click the Role drop-down list to search for users by user detail (email address) or by role type (user / agent).
2	<p>There are 2 types of users:</p> <ul style="list-style-type: none"> • Admin roles have access to all functionality including reports and commission statements. Commission statements are password protected so Admin access can be given to users even if you do not want them to have access to the commission statements as these users will not be able to open a commission statement unless they have the password. • Agent roles have access to policy admin and quote & purchase functionality only.
3	Click the Search button to see all users matching your search criteria.
4	The Reset button allows you to clear your search criteria and search again.

The screenshot shows the 'My Account' page in the Irish Life Health Live system. At the top is a navigation bar with the following items: Home, Policy Admin, Quote & Purchase, Documents, Reporting, My Account (underlined), and Log Out. Below the navigation bar is the 'My Account' heading. Underneath, there are two tabs: 'User Management' (highlighted with a yellow circle '1') and 'My Details'. Below the tabs, there is a sub-heading 'Search Users' and a search form. The search form contains a text input field labeled 'Name/Email Address' with the placeholder text 'Search user by partial name/email', a dropdown menu labeled 'Role' with 'ALL' selected, and two buttons: 'Search' (highlighted with a yellow circle '3') and 'Reset' (highlighted with a yellow circle '4'). Above the search form, there is a list of roles: 'ADMIN: grants the user full access to ILH Live' and 'AGENT: grants the user Policy Admin and Quote/Purchase access only.' (highlighted with a yellow circle '2').

6.1.2 Update a User's Role or Deactivate a User

1	If you are an Admin role you will see a list of all users and their roles under Update User's Role.
2	Click the user radio button of the user you would like to update.
3	The Update role panel appears.
4	Click the role you would like to update the user to, i.e. admin or agent.
5	Click the Update button to save the change to the user's role.
6	Alternatively, you could deactivate the user by clicking the Deactivate button.

The screenshot shows the 'Update User Role' interface. At the top, there is a header 'Update User Role' with a callout '1'. Below it is a list of users, each with a radio button and a role label (e.g., [AGENT], [ADMIN]). Callout '2' points to the first radio button. Below the list is a sub-panel titled 'Update User Role' with callout '3'. This sub-panel contains a list of users with radio buttons and role labels. Callout '3' points to the first radio button. To the right of this sub-panel is another section titled 'Update their role' with callout '4'. This section contains two radio buttons: 'ADMIN' and 'AGENT'. Below these is a note: 'Admins will have access to everything while Agents will just have access to Policy Admin and Quote/Purchase.' At the bottom of this section are two buttons: 'Update' (callout '5') and 'Deactivate' (callout '6').

6.1.3 Create a New User

1	If you are an Admin role you will see the Create User area.
2	Enter the new user's name.
3	Enter the new user's email address.
4	Click the role you would like to assign to the new user.
5	Click the Create User button.
Note	The user will receive an email with a link to create a password.

The screenshot shows the 'Create User' interface. At the top left, the text 'Create User' is followed by a yellow circle containing the number '1'. Below this, a note states: 'Admins will have access to everything while Agents will just have access to Policy Admin and Quote/Purchase.' The form contains two input fields: 'Name' with a yellow circle '2' over it, and 'Email address' with a yellow circle '3' over it. To the right of the email field are two radio buttons: 'ADMIN' (unselected) and 'AGENT' (selected), with a yellow circle '4' over the 'AGENT' button. At the bottom left, there is a green 'Create User' button with a yellow circle '5' over it.

7 Policy Admin

7.1 Manage Policies

7.1.1 Search Policy

- 1 When you click the Policy Admin link at the top of the home page you will be directed to the Manage Policies screen.
This screen has two tabs:
 - Search Policy, and
 - Policies by SchemeThe Search Policy tab is a duplication of the search policy functionality on the Welcome/Home page.
- 2 Click the Policies by Scheme tab to view lists of policies by scheme.

The screenshot displays the 'Manage Policies' interface. At the top, there are two tabs: 'Search Policy' (active) and 'Policies by scheme'. Below the tabs is a search form titled 'Search Policy'. The form contains four radio button options: 'Policy Number' (selected), 'Member Number', 'Last Name and Date of Birth', and 'Staff Number'. Below these options is a text input field labeled 'Policy Number' with the placeholder text 'Policy Number'. At the bottom of the form is a green button labeled 'Find Policy'.

7.1.2 Policies by Scheme

1 Click in the Select a Scheme field or box to see a list of all schemes allocated to your account on Irish Life Health Live. Select the scheme from the list.

2 Click Find Policies. These results will be categorised by Live, Quotes & Cancelled.

3 A full list of policies for the scheme will appear.

4 If the list of members were multiple pages long, you would be able to navigate between pages in the list.

Policy Number	Name	Date of Birth	Plan	Policy € Annual Premium	Policy Renewal Date
[blurred]	Vnben U'Swimx	01/07/1960	Better Select ILH	€1666.40	01/01/2022
[blurred]	Hjyky Vkbjdp	01/11/1984	Better Select ILH	€1281.30	01/01/2022
[blurred]	Okew Snpz	01/04/1991	Better Select ILH	€1281.30	01/01/2022
[blurred]	Vnbhgxwed Znxslp	01/07/1991	Better Select ILH	€1281.30	01/01/2022
[blurred]	Ocxj Sxmpy	01/06/1987	Better Select ILH	€1281.30	01/01/2022
[blurred]	Jyjeky Vcwtnm	01/11/1973	Better Select ILH	€3955.10	01/01/2022
[blurred]	Cbjyn Sjhwo	01/10/1976	Better Select ILH	€4066.60	01/01/2022
[blurred]	Znbfdimbcyasx Fvjolods	01/11/1980	Better Select ILH	€1310.90	01/01/2022
[blurred]	Gbztyzg Osqskyw	01/07/1992	Better Select ILH	€1281.30	01/01/2022
[blurred]	Rmannl Zxbyn	01/07/1968	Better Select ILH	€1666.40	01/01/2022

5	Type search criteria in the Search Within Results box to refine your search.
6	Click the relevant policy number hyperlinked in blue to open the policy.

Policy Number	Name	Date of Birth	Plan	Policy € Annual Premium	Policy Renewal Date
[redacted]	Vnben U'Swimx	01/07/1960	Better Select ILH	€1666.40	01/01/2022
[redacted]	Kcheky Vnben	01/05/1985	Better Select ILH	€1281.30	01/01/2022
[redacted]	Vnben U'Bxnb	01/08/1965	Better Select ILH	€3116.30	01/01/2022

7.2 Individual Policy Details

1	<p>When you click on an individual policy, the policy details for that policy displays 5 / 6 tabs – depending on whether the policy is due for renewal:</p> <ul style="list-style-type: none"> ○ Policy Details ○ Cover and Benefits ○ Documents ○ History ○ Premium Details ○ Renewal – this will display when a policy is due for renewal
2	<p>Under Policy Details you will be able to view the:</p> <ul style="list-style-type: none"> ○ Start Date ○ End Date ○ Next Renewal Date ○ Status
	<p>Policy Details</p> <p>This policy is due for renewal. The renewal invitation pack is in the Documents tab above.</p> <p>Start Date 01/03/2020</p> <p>End Date 28/02/2021</p> <p>Next Renewal Date 01/03/2021</p> <p>Status Live</p>

The Renewal tab includes 2 tabs:

- The Renewal Quote Details tab
- The Pay Renewal tab

Policy Details Cover and Benefits Documents History Premium Details **Renewal**

Renew this policy

Information about the renewal on this policy is shown below. Please also check the Renewal Invitation documents under the Documents tab.

You can renew this policy online by Credit Card for your client.

Renewal Quote Details Pay Renewal

Policy Details

Quote Number
 Start Date: 01/03/2021
 End Date: 28/02/2022
 Net Premium Group: €0.00
 Net Premium Member: €1,707.00
 Average Monthly Payment: €142.25

Policy Holder Details

Name: Gnxti Lkqjdp
 Email: gnxti.lkqjdp@irishlifehealth.ie
 Home Phone:
 Work Ph
 Mobile Phone:
 Address 1: Irishlifehealth,
 Address 2: Irish Life Centre
 Address 3: Lower Abbey Street
 County: Co Cork

Insured Member(s)

Title	Name	Plan	Packages	DOB	Relationship	Total Gross Premium	Government Levy	Total Net Premium
Mr	Dsixjgxp Lkqjdp	Select Starter		01/05/1955	Dependant	€711.26	€157.00	€569.00
Mr	Jdkdlv Lkqjdp	Select Starter		01/09/1986	Dependant	€711.26	€157.00	€569.00
Mrs	Gnxti Lkqjdp	Select Starter		01/06/1957	Policyholder	€711.26	€157.00	€569.00

Premium Breakdown

Name	Premium	Risk Equalisation Premium Credit	Levy	Gross Premium (before Group Discount)	Group Discount	LCR Loading	Net Premium	Your Tax Relief	Total Due
Dsixjgxp Lkqjdp	€711.29	€350.00	€157.00	€711.29	€0.00	€0.00	€711.26	€142.26	€569.00
Jdkdlv Lkqjdp	€711.29	€0.00	€157.00	€711.29	€0.00	€0.00	€711.26	€142.26	€569.00
Gnxti Lkqjdp	€711.29	€0.00	€157.00	€711.29	€0.00	€0.00	€711.26	€142.26	€569.00

3

The next section under Policy Details shows the Members on the policy. This is where members can be added and deleted, member details like last name can be amended and plan type per member can be changed.

Members

+ Add a member

Ryggauq Bnday
(Policyholder)

3

Plan
4D Health 1

Member Number
3244435

Date of Birth
01/01/1977

Join Date
31/12/2020

First Insured
20/05/2019

Name
Ryggauq Bnday

Scheme Name
Cognizant Accenture Scheme

Staff Number
884124

Actions

Change Cover

The policyholder cannot be removed.

Last Name

Bnday

Update Last Name

4

The next section shows you the Addresses on Policy.

Addresses on the policy

Postal Address

Billing Address

4

Address Line 1

Irishlifehealth,

Address Line 2

Irish Life Centre

Address Line 3

Lower Abbey Street

Town / City

Dublin 1

County

DUBLIN 3

Update Postal Address

5

The last section shows you the Other Policy Details. In this section, the policy contact details, contact preferences and method of payment can be amended and updated.

The screenshot displays a web form titled "Other Policy Details" with a yellow circle containing the number "5" next to the title. Below the title are three tabs: "Contact Details" (highlighted in teal), "Contact Preferences", and "Method of Payment". The form contains four input fields: "Email" with the value "test.email@irishlifehealth.ie", "Mobile Phone", "Home Phone", and "Work Phone". A teal "Save" button is located at the bottom left of the form area.

7.2.1 Renew the policy by Credit Card

<p>Notes</p>	<ul style="list-style-type: none"> • This Pay Renewal tab will only display if the policyholder has chosen credit card (annual) payment as their payment method. • If a policholder wishes to switch from monthly payments to annual payments, an amendment to the policy method of payment will be required before the renewal can be paid for by credit card as shown here. To do this, access the Policy Details tab and access the Method of Payment tab under Other Policy Details to change the member from Credit Card to Direct Debit. • If any details need to be changed on the renewal – for e.g., if a plan change or member change is required – this should be carried out first before taking payment for the Renewal.
<p>1</p>	<p><u>Assuming all the details under the Renewal Quote Details are correct and no amendments are required before renewal</u>, click the Pay Renewal tab to capture the member's credit card details and process payment for the renewal.</p>
<p>2</p>	<p>Check the amount to be charged is correct.</p>
<p>3</p>	<p>Tick both boxes on behalf of the policyholder.</p>
<p>4</p>	<p>Click Pay Renewal Now.</p>

Renewal Quote Details
Pay Renewal

Credit Card 1

Card Holder Name*

Card Number*

Expiry Month*

Please Select
▼

Expiry Year*

Please Select
▼

CVV*

Issue Number (Switch cards only)

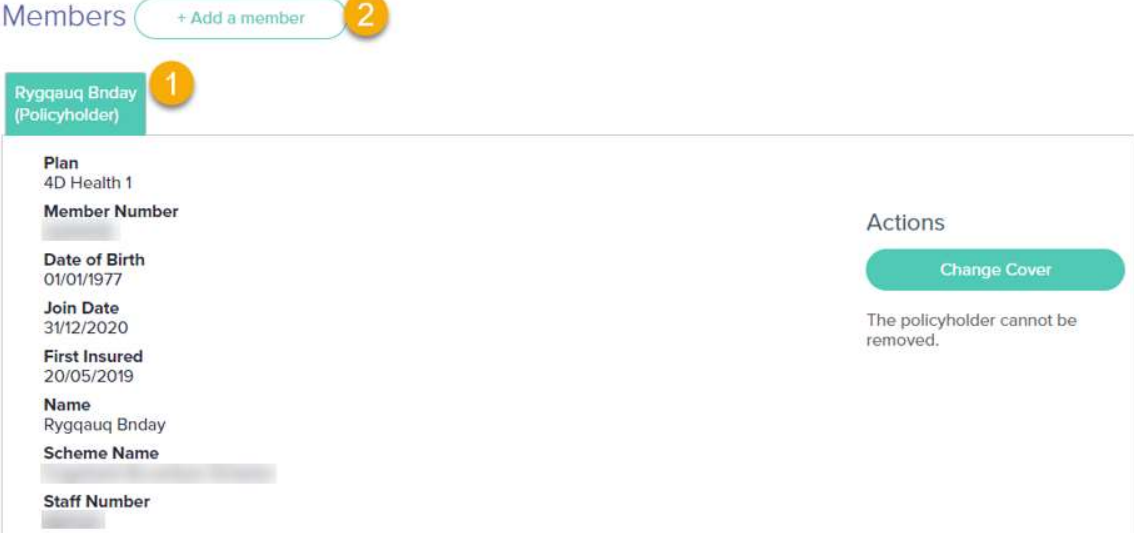
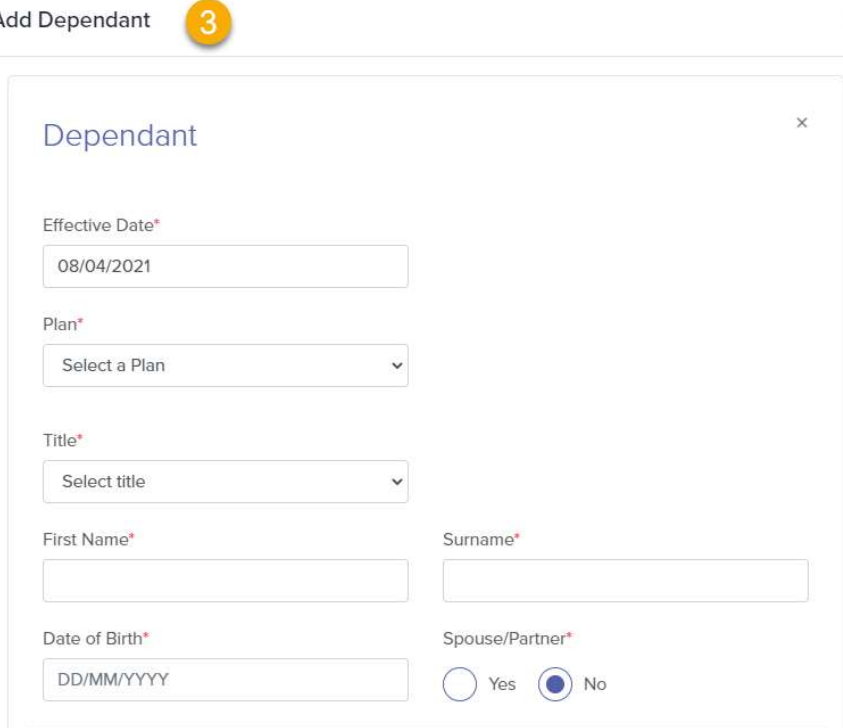
2 Amount to be charged is €1,707.00

3 I agree to have the full balance charged to my credit/debit card.*

I have read and accept the key Terms & Conditions, Terms of Business, Data Privacy Notice, Website Use Policy. *

4 Pay renewal now

7.2.2 Add a Member

1	<p>Each member already on the policy appears as a separate tab. The policyholder will always display as the first tab. Other members of the policy are labelled as:</p> <ul style="list-style-type: none"> ○ Name and surname ○ (Type) e.g. Policyholder or Partner or Spouse or Dependant etc.
2	<p>Click the Add Member button to add a new member.</p>
	
3	<p>The Add Dependant screen opens.</p>
	
<p>Notes</p>	<ul style="list-style-type: none"> • A red asterisk (*) indicates mandatory fields. • Complete the fields for the member. • If the policy is due for renewal, the effective date will be auto-selected to the renewal date and cannot be amended.

4	Complete the Lifetime Community Rating and Previous Health Insurance questions.
Notes	<ul style="list-style-type: none"> • The date of birth field will determine if the Lifetime Community Rating section appears or not. • Different sub-questions will appear depending on the answers given to each question according to the regulations for Lifetime Community Rating. • In this first example, the member is older than 35, so the Lifetime Community Rating sections and the Previous Health Insurance questions must be completed.

Date of Birth* Spouse/Partner* Yes No

Lifetime Community Rating 4

Lifetime Community Rating Legislation was introduced on May 1st 2015.

For this reason, we need to ask the following questions. The following questions relate to health insurance cover that this dependant held in Ireland only.

However, if any of the following applies to this dependant then they may be entitled to a reduction in their loading.

- Have they had a break in their insured cover of 6 months or more that began on or after the 1st February 2019?
- Have they been living out of the state for any period of 6 months or more, beginning on or after 1st November 2018
- Were they covered under the Defence Forces Scheme or Members of the EU Joint Sickness Scheme?

If any of these apply to this dependant, please contact us directly.

Has this dependant had continuous health insurance cover since April 30th 2015?

Yes No

Has this dependant ever had health insurance in Ireland?

Yes No

Was this dependant a resident in Ireland on 1st May 2015?

Yes No

Has this dependant been dependent on social welfare payments for more than 6 months at any time since 1st January 2008?

Yes No

In this scenario, as the member is under 35 in age, only the Previous Health Insurance section has opened up for completion.

Notice that this member has not previously held private health insurance, so the Waiting Periods link is provided to prompt the conversation on these.

Previous Health Insurance

Does this dependant have current or previous health insurance?*

Yes No

This dependant may be subject to waiting periods on the policy and claims made within applicable waiting periods may be declined.

[Find out more about waiting periods](#)

[+ Add Another Person](#)

Where the member is under 35 but has had private health insurance previously, these details must be captured.

5 Click Add Another Person to add another dependent to the policy.

6 Click the Next button once all questions are answered.

Previous Health Insurance

Does this dependant have current or previous health insurance?*

Yes

No

Current or previous health insurer*

Laya Healthcare

Current or previous plan*

Aspire

Last renewal date*

01/04/2020

5

+ Add Another Person

6

Cancel

Next

7

The Add Dependent summary screen will appear showing the premium increase.

In this example, the policy is due for renewal so the premium increase will not reflect here as it will reflect in the renewal tab once the member is added. This is because this member can only be added from the next renewal date.

There is no cover for this member until the next renewal date, so there is no premium charge.

This screen would show the premium charges and pro rata of benefit warnings if a member was added midterm.

Add Dependant

x

7

Effective Date: 01/03/2021 (TEST TEST)

Total Chargeable: € 0.00

Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge
TEST TEST	Dependant	N/A	€0	Select	0.00	€0.00

Total Premium: €0.00

Total Chargeable: €0.00

Day-to-day and outpatient claims may be prorated depending on the date the member is added from.

Day-to-day and outpatient claims may be prorated depending on the date the policy was cancelled from.

Cancel

Next

8	The next screen is the waiting period confirmation screen. Each waiting period must be explained and acknowledged to process the change to the policy.
9	Tick to confirm the Upgrade & Pre-Existing Condition Waiting Periods have been explained.

Add Dependant x

Effective Date: 01/03/2021 (TEST TEST) 8

Total Chargeable: € 0.00

There is no change in price to this year's policy as the effect will take place from your renewal. A renewal quote will be sent out to you with the newly calculated price for your next policy period.

Please confirm that you understand the impact of changing over. 9

1. Upgrade Waiting Periods

An upgrade waiting period will apply when you upgrade your cover (i.e. you purchase a plan with more comprehensive cover than your previous plan). This may happen if you change your plan with us or when coming to Irish Life Health from another health insurer. We will apply an upgrade waiting period to claims where your treatment relates to a pre-existing condition. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

2. Pre-existing Condition Waiting Periods

Where you make a claim which relates to a pre-existing condition, a pre-existing condition waiting period will apply. A pre-existing condition is an ailment, illness or condition, the signs or symptoms of which existed at any time in the six months before you took out health insurance for the first time or before you took out health insurance after your health insurance had lapsed for more than 13 weeks.

You will not be covered for a pre-existing condition during your pre-existing condition waiting period. Our medical advisers will decide whether your claim relates to a pre-existing condition. Their decision is final.

Pre-existing condition waiting periods do not apply in the following circumstances:

- To claims made in respect of children who have been added to your policy within 13 weeks of the date of their birth
- To claims made in respect of adopted children who have been added to your policy within 13 weeks of the date of their adoption

10	Do the same for the Downgrading Your Cover Section.
11	Click Back, Close or Confirm.

✓ 3. Downgrading Your Cover 10

You may downgrade your cover (i.e. you purchase a plan with a lower level of benefit cover than your previous plan) by changing your plan with us or when coming to Irish Life Health from another insurer. If you subsequently choose to upgrade your level of cover more than 13 weeks after the date you made the change, you will be subject to Upgrade Waiting Periods for pre-existing conditions on the new higher level of cover. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

11

Back

Close

Confirm

Notes:

- Clicking Back will take you to previous steps in the Add Member process.
- Clicking Close will cancel the Add Member process.
- Clicking Confirm will save and implement the change – i.e., this will add the member to the policy.

7.2.3 Delete a Member

Note	You cannot delete the policyholder from a policy.
1	Click the tab for the member you would like to delete.
2	Click the Delete this member button.

Members + Add a member

Ekqd Utdkk (Policyholder)

Vchddbl Utdkk (Partner) 1

Plan
Better Select ILH

Member Number
[Redacted]

Date of Birth
01/01/1982

Join Date
01/01/2021

First Insured
01/01/2018

Name
Vchddbl Utdkk

Scheme Name
[Redacted]

Actions

Change Cover

Delete this member 2

3	Enter an Effective Date.
4	Click the Next button.

Delete this member - Vchddbl Utdkk ×

Effective Date

3

Delete this member from the policy?
Vchddbl Utdkk ([Redacted])

3
4

Close
Next

5	View the reduction in premium and click Next.														
<p>Delete this member</p> <hr/> <p>Effective Date: 21/05/2020</p> <p>Total Chargeble: € -407.30</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Role</th> <th>Current Plan</th> <th>Current Premium</th> <th>New Plan</th> <th>New Premium</th> <th>Charge</th> </tr> </thead> <tbody> <tr> <td>Jvss Xirdod</td> <td>Dependant</td> <td>Select Plus</td> <td>€536.70</td> <td>Select Plus</td> <td>-407.30</td> <td>€-407.30</td> </tr> </tbody> </table> <hr/> <p style="text-align: right;">Total Premium: €-407.30</p> <p style="text-align: right;">Total Chargeble: €-407.30</p> <div style="text-align: right;"> 5 Cancel Next </div>		Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge	Jvss Xirdod	Dependant	Select Plus	€536.70	Select Plus	-407.30	€-407.30
Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge									
Jvss Xirdod	Dependant	Select Plus	€536.70	Select Plus	-407.30	€-407.30									
5-7	Confirm and tick the impact cancelling has on each type of waiting period.														
8	Click the Confirm button to delete the member.														

Please confirm that your client understands the impact of changing over.

1. Upgrade Waiting Periods

5

An upgrade waiting period will apply when you upgrade your cover (i.e. you purchase a plan with more comprehensive cover than your previous plan). This may happen if you change your plan with us or when coming to Irish Life Health from another health insurer. We will apply an upgrade waiting period to claims where your treatment relates to a pre-existing condition. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

*

A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

2. Pre-existing Condition Waiting Periods

6

Where you make a claim which relates to a pre-existing condition, a pre-existing condition waiting period will apply. A pre-existing condition is an ailment, illness or condition, the signs or symptoms of which existed at any time in the six months before you took out health insurance for the first time or before you took out health insurance after your health insurance had lapsed for more than 13 weeks.

*

You will not be covered for a pre-existing condition during your pre-existing condition waiting period. Our medical advisers will decide whether your claim relates to a pre-existing condition. Their decision is final.

Pre-existing condition waiting periods do not apply in the following circumstances:

- To claims made in respect of children who have been added to your policy within 13 weeks of the date of their birth
- To claims made in respect of adopted children who have been added to your policy within 13 weeks of the date of their adoption

3. Downgrading Your Cover

7

You may downgrade your cover (i.e. you purchase a plan with a lower level of benefit cover than your previous plan) by changing your plan with us or when coming to Irish Life Health from another insurer. If you subsequently choose to upgrade your level of cover more than 13 weeks after the date you made the change, you will be subject to Upgrade Waiting Periods for pre-existing conditions on the new higher level of cover. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

*

A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

8

Back

Close

Confirm

9

Click Close to view the updated policy.

Delete this member - Asjy Evzxo

x

Effective Date: 08/04/2021 (Asjy Evzxo)

Total Chargeable: € 0.00

Policy successfully updated. Click 'Close' to view the updated policy.

There is no charge to your client for this policy change.

9

Back

Close

7.2.4 Changing cover

Note	You can change cover for an individual member or for all members on a policy.
1	Click the tab for the member you would like to change cover for.
2	Click the Change Cover button

3	Enter an Effective Date.
4	Select the radio button to apply the change to all members (Yes) or only to the member selected (No).
5	Select the plan from the Select Plan drop-down list
6	Select Personalised Packages – where applicable.
7	Click the Next button.

9

View the impact on the premium and click Next.

Change Cover - Vnben Evzxo

Effective Date: 08/04/2021 (Vnben Evzxo)

Total Chargeable: € 10.40

Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge
Vnben Evzxo	Policyholder	Better Select ILH	€1281.30	Better Ultra ILH	12.00	€10.40

Total Premium: €12.00

Total Chargeable: €10.40

Cancel Next

9

10

Select the payment method and complete the details

Change Cover - Vnben Evzxo

Effective Date: 08/04/2021 (Vnben Evzxo)

Total Chargeable: € 10.40

Payment options

Direct Debit Credit Card

Direct Debit

Account Holder*

Text input field for Account Holder

IBAN*

Text input field for IBAN

Collection Day*

Dropdown menu for Collection Day with 'Please Select' option

Amount to be charged is €0.00

I confirm that this account accepts Direct Debits and I am the only person required to authorise Direct Debits from this account.*

Effective Date: 08/04/2021 (Vnben Evzxo)

Total Chargeable: € 10.40

Payment options

Direct Debit

Credit Card

Credit Card

Card Holder Name*

Card Number*

Expiry Month*

Expiry Year*

CVV*

Issue Number (Switch cards only)

Amount to be charged is €10.40

I agree to have the full balance charged to my credit/debit card.*

11

Confirm and tick the impact cancelling has on each type of waiting period.
Click the confirm button to change cover.

Please confirm that your client understands the impact of changing over.

11

1. Upgrade Waiting Periods

An upgrade waiting period will apply when you upgrade your cover (i.e. you purchase a plan with more comprehensive cover than your previous plan). This may happen if you change your plan with us or when coming to Irish Life Health from another health insurer. We will apply an upgrade waiting period to claims where your treatment relates to a pre-existing condition. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

2. Pre-existing Condition Waiting Periods

Where you make a claim which relates to a pre-existing condition, a pre-existing condition waiting period will apply. A pre-existing condition is an ailment, illness or condition, the signs or symptoms of which existed at any time in the six months before you took out health insurance for the first time or before you took out health insurance after your health insurance had lapsed for more than 13 weeks.

You will not be covered for a pre-existing condition during your pre-existing condition waiting period. Our medical advisers will decide whether your claim relates to a pre-existing condition. Their decision is final.

Pre-existing condition waiting periods do not apply in the following circumstances:

- To claims made in respect of children who have been added to your policy within 13 weeks of the date of their birth
- To claims made in respect of adopted children who have been added to your policy within 13 weeks of the date of their adoption

3. Downgrading Your Cover

You may downgrade your cover (i.e. you purchase a plan with a lower level of benefit cover than your previous plan) by changing your plan with us or when coming to Irish Life Health from another insurer. If you subsequently choose to upgrade your level of cover more than 13 weeks after the date you made the change, you will be subject to Upgrade Waiting Periods for pre-existing conditions on the new higher level of cover. Where an upgrade waiting period applies, we will cover you up to the level that was available under the benefit that you are claiming of your previous plan. Where the benefit you are claiming was not available on your previous plan, you will not be covered.

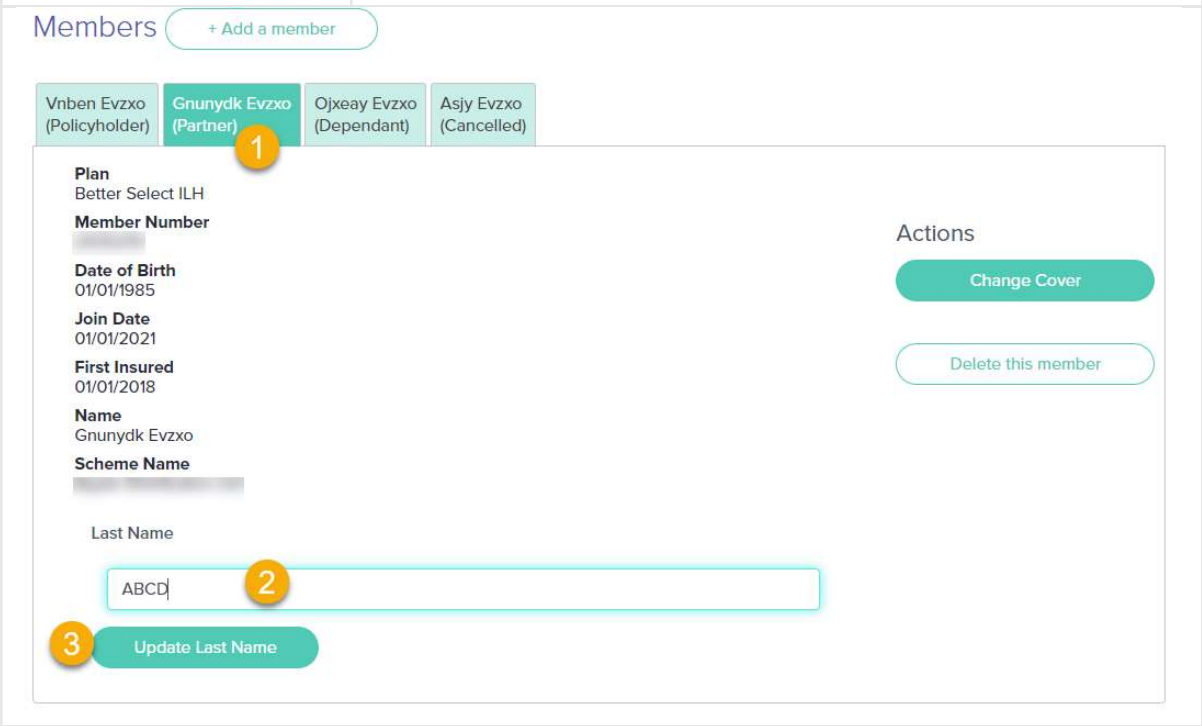
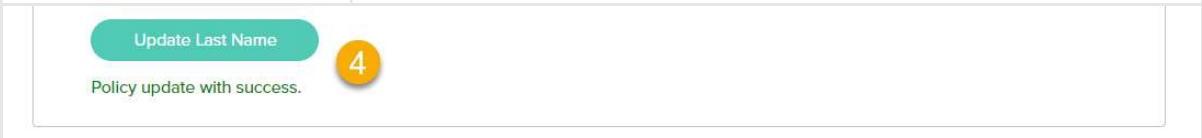
A pre-existing condition is any ailment, illness or condition that, on the basis of medical advice, the signs or symptoms of which existed at any time in the period of six months ending on the day on which

- you took out health insurance for the first time
- or you took out health insurance after your health insurance had lapsed for more than 13 weeks.
- or you upgraded your cover to a higher level plan

Our medical advisers will determine when your ailment, illness or condition commenced. Their decision is final.

Back Close Confirm

7.2.5 Update Member Surname

1	Click the tab for the member you would like to update.
2	Select and overwrite the existing name in the Update Last Name text box.
3	Click the Update Last Name button.
 <p>The screenshot shows the 'Members' section with a '+ Add a member' button. Below are four tabs: 'Vnben Evzxo (Policyholder)', 'Gnunydk Evzxo (Partner)', 'Ojxeay Evzxo (Dependant)', and 'Asjy Evzxo (Cancelled)'. The 'Gnunydk Evzxo (Partner)' tab is selected and marked with a '1'. The member details for this tab are shown, including Plan (Better Select ILH), Member Number, Date of Birth (01/01/1985), Join Date (01/01/2021), First Insured (01/01/2018), Name (Gnunydk Evzxo), and Scheme Name. The 'Last Name' field is highlighted with a '2' and contains the text 'ABCD'. Below the field is an 'Update Last Name' button, which is highlighted with a '3'. To the right of the details are 'Actions' buttons: 'Change Cover' and 'Delete this member'.</p>	
4	A message confirming the change will display.
 <p>The screenshot shows a confirmation message. At the top is the 'Update Last Name' button. Below it is the text 'Policy update with success.', which is highlighted with a '4'.</p>	

7.2.6 Update Postal or Billing Address

Note	We can only keep one address for all members on a policy on file.
1	Click the Postal Address or Billing Address tab as required.
2	Overwrite the existing information.
3	Click the Update (Postal / Billing) Address button.

Addresses on the policy

Postal AddressBilling Address

1

Address Line 1

Address Line 2

Address Line 3

Town / City

2

County

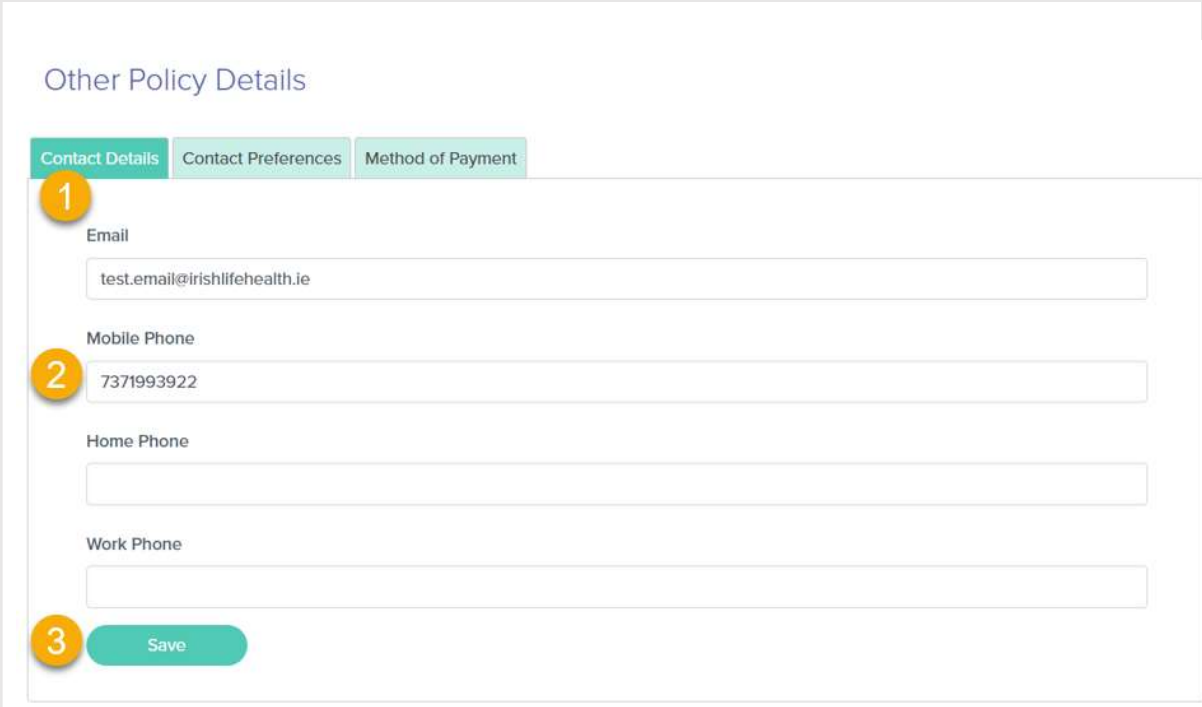
3

Update Postal Address



4	A message confirming the change will display.
----------	---

Policy update with success. **4**

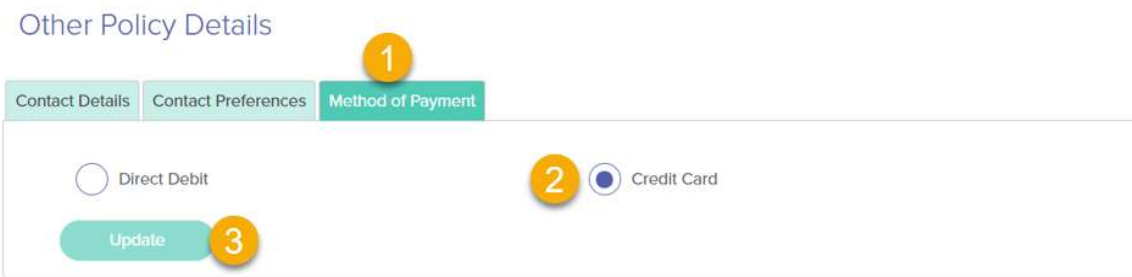

7.2.7 Update Contact Details

1	Under Other Policy Details, click the Contact Details tab.
2	Overwrite the existing information or enter information in the relevant field.
3	Click the Save button.
 <p>The screenshot shows a web interface for updating contact details. At the top, there are three tabs: 'Contact Details' (highlighted in teal), 'Contact Preferences', and 'Method of Payment'. Below the tabs, there are four input fields: 'Email' (containing 'test.email@irishlifehealth.ie'), 'Mobile Phone' (containing '7371993922'), 'Home Phone', and 'Work Phone'. A teal 'Save' button is located below the 'Work Phone' field. At the bottom of the page, a green message box displays 'Policy update with success.' with a small orange circle containing the number '4' next to it.</p>	
4	A message confirming the change will display.

7.2.8 Update Contact Preferences

1	Under Other Policy Details, click the Contact Preferences tab.
2	Select the radio button for Electronic or Post as per the member's preference.
3	Click the Update button.
	
4	A message confirming the change will display.
	

7.2.9 Update Method of Payment

1	Under Other Policy Details, click the Method of Payment tab.
2	Select the radio button for Electronic or Post as per the member's preference.
3	Click the Update button.
	
4	A message confirming the change will display.
	

7.2.10 Viewing Cover on a Policy

Note	This page is under the Policy Admin section and appears once you have searched for and clicked on a specific policy.
1	Click the Cover and Benefits tab.
2	View who is covered. Each member has an individual cover tab. Click the relevant member.
3	Notice the links to the member's Membership Handbook/s, Statement of Consumer Rights and Data Privacy Notice. Note: The Membership Handbook may differ for different policy members if they are on different plans.

Policy VIVG526653

1


Policy Details **Cover and Benefits** Documents History Premium Details

Cover Details for VIV [REDACTED]

Who is covered?
Select a member to view their benefits and Terms & Conditions.

Vnben Evzxo (Policyholder) Gnunydk Evzxo (Partner) Ojxeay Evzxo (Dependant) Asjy Evzxo (Cancelled)

2


Vnben Evzxo
Member Number: [REDACTED]
Better Select ILH
Personalised Packages: You Extra, Travel Extra

Terms & Conditions/ Policy Documents

A complete overview of policy Terms & Conditions.

3

- View member Membership Handbook
- View Data Privacy Notice

4

Scroll down to view a summarised view of the most common everyday health cover benefits on the member's current plan.

Member's everyday health cover

4

A summary of the key everyday health benefits on member's plan.



Consultants

€75 per visit, unlimited.



MRI Scans

MRI Scan: approved centre.
Fully covered.

Covered up to €250.



CT Scans

CT Scan: approved centre.
Fully covered.

Covered up to €250.



GP Visits

€25 per visit, unlimited.



Dental

€25 x 10 visits.

€350.



Physiotherapist

Unfortunately this benefit is not covered.



Optical

Up to €100 per policy year.



Nutrition

€25 x 5 combined visits.

€30 x 3 visits.



Massage

€25 x 5 visits.

5

Scroll down to view a summarised view of the member's hospital cover on the member's current plan.

6

Click the hospital list link to open the member's hospital list document.

Member's hospital cover

5

A summary of the hospital cover on member's plan.

Consultant fees and inpatient scans

- ✔ **Consultant fees** Covered
- ✔ **Inpatient Scans** Covered

Public Hospitals

- ✔ Day Case: Covered
- ✔ Private Room: Covered
- ✔ Semi Private Room: Covered

Private Hospitals

- ✔ Day Case: Covered subject to €75 excess per claim
- ✔ Private Room: Covered subject to €100 nightly excess subject to €2,000 co-payment on certain orthopaedic procedures
- ✔ Semi Private Room: Covered subject to €75 excess per claim subject to €2,000 co-payment on certain orthopaedic procedures

High Tech Hospitals

- ✔ Day Case: Covered subject to €75 excess per claim
- ✔ Listed Cardiac Procedures: 90% Cover subject to €150 excess per claim
- ✔ Listed Special Procedures: Covered (Beacon Only) subject to €75 excess per claim. Mater Private and Blackrock Clinic 90% cover subject to €150 excess per claim. All subject to €2,000 co-payment on certain orthopaedic procedures
- ✔ Private Room: Covered (Beacon only) subject to €100 nightly excess. Mater Private and Blackrock Clinic 50% of Semi-Private Rate.
- ✔ Semi Private Room: Covered (Beacon Only) subject to €75 excess per claim. Mater Private and Blackrock Clinic 50% cover.

6

[View member's hospital list](#)



Irish Life
health

Tailored Health Plans Lists of Medical Facilities

Lists of Medical Facilities: as of 01 April 2021

A. Hospitals	Hospital type	Direct Settlement	List A
Cavan			
Cavan General Hospital	Public	Yes	Covered
Clare			
Mid Western Regional Hospital, Ennis	Public	Yes	Covered
Cork			
Bantry General Hospital	Public	Yes	Covered
Bon Secours Hospital, Cork	Private	Yes	Covered
Cork Radiation Oncology at Bon Secours	Private	Yes	Covered
Cork University Hospital	Public	Yes	Covered
Cork University Maternity Hospital	Public	Yes	Covered
Mallow General Hospital	Public	Yes	Covered
Mater Private Cork	Private	Yes	Covered
Mercy University Hospital	Public	Yes	Covered
St. Patrick's (Marymount Hospice)	Public	Yes	Covered
South Infirmary Victoria University Hospital	Public	Yes	Covered

7

Scroll down to view the member's full table of cover.

Member's table of cover

Click to view the full list of benefits on member's plan in detail.

7

Hospital Cover	⌵
Maternity	⌵
Emergency Inpatient Treatment Abroad and related benefits	⌵
Elective Overseas Referral	⌵
Psychiatric Treatment	⌵
Other Benefits	⌵
Outpatient Benefits	⌵
Scan Cover	⌵
Day to Day Practitioners	⌵
Allied Health Professionals and Alternative Practitioners	⌵
Other Day to Day Benefits	⌵
Personalised Packages	⌵

8

Use the arrows to expand each section on the table of cover.

Member's table of cover

Click to view the full list of benefits on member's plan in detail.

Hospital Cover	⌵
Maternity	8 ⌵
✓ Home birth	
Covered up to €4,000	
✓ Inpatient maternity consultant fees	
As per schedule of benefits for professional fees	
✓ Public hospital cover for maternity	
3 nights accommodation in a private room	

7.2.11 Viewing Policy Documents

7.2.11.1 Viewing Documents for the Current Policy Year

Note	This page is under the Policy Admin section and appears once you have searched for and clicked on a specific policy.
1	Click the Documents tab.
Note	This has two sub-tabs: <ul style="list-style-type: none"> • Current Year's Documents • All Years' Documents
2	Click the Current Year's Documents tab to see the documents relating to the most recent policy. Note: You will see some policy documents but not any documents relating to claims.
3	Click the View button next to the document you want to open.

The screenshot shows the 'Policy Documents' page. At the top, there is a navigation bar with tabs: 'Policy Details', 'Cover and Benefits', 'Documents' (highlighted), 'History', 'Premium Details', and 'Renewal'. Below this, the page title 'Policy Documents' is displayed with a callout '1' pointing to it. Underneath the title, there are two sub-tabs: 'Current Policy Year' (highlighted with callout '2') and 'All Policy Years'. Below the sub-tabs, there is a search area with a 'Show 10 entries' dropdown and a search input field. The main content is a table with the following columns: 'Date Created', 'Document Name', and 'View'. The table contains four rows of data:

Date Created	Document Name	View
2020-01-29	Renewal Invite	View (with callout '3')
2020-02-14	Your Renewal	View
2020-02-24	Your Renewal Confirmation	View
2021-01-30	Renewal Invite	View

At the bottom of the table, it says 'Showing 1 to 4 of 4 entries' and 'Previous 1 Next'.

7.2.11.2 Viewing Document for Previous Policy Year/s

1	Click the All Policy Years Documents tab to open policy documents from previous years.
2	Click the Select a Policy Year drop-down list to choose the relevant policy year.
3	Click the Get Documents button.
4	Click the View button next to the document you want to open.

The screenshot shows the 'Policy Documents' section of a user interface. At the top, there are navigation tabs: 'Policy Details', 'Cover and Benefits', 'Documents', 'History', 'Premium Details', and 'Renewal'. The 'Documents' tab is active. Below the tabs, there are two sub-tabs: 'Current Policy Year' and 'All Policy Years'. The 'All Policy Years' tab is selected and has a callout '1'. Below these tabs is a dropdown menu labeled 'Select a policy year to retrieve documents' with the value '01/03/2018 to 28/02/2019' and a callout '2'. Below the dropdown is a green 'Get Documents' button with a callout '3'. Underneath is a 'Show 10 entries' control and a search box. The main area contains a table with columns 'Date Created', 'Document Name', and 'View'. The table has three rows: '2018-02-02 Health Insurance Quote', '2018-02-08 Health Insurance Quote', and '2018-02-26 Welcome - Your Policy'. Each row has a 'View' button, with the first one having a callout '4'. At the bottom, there is a pagination control showing 'Showing 1 to 3 of 3 entries' and 'Previous 1 Next'.

7.2.12 Viewing Policy History

Click the History tab to open policy history.

Policy

Policy Details Cover and Benefits Documents **History** Premium Details

Policy History

Activity Date	Change	€ Premium Change (Gross)	€ Tax Relief at Source	€ Premium Change (Net)
31/12/2019	Renewal	€1301.88	€200.00	€971.70
31/12/2018	New Policy	€1245.44	€200.00	€920.90

Prev 1 Next

7.2.13 Viewing Policy Premium Breakdown

1 Click the Premium tab.

Policy Details Cover and Benefits Documents History **Premium Details**

Premium Breakdown

Policy Premium Details

Policy start date
31/12/2019

Policy end date
30/12/2020

Scheme Name

Your company pays
€971.70

You pay
€0.00

Payment method
Through Corporate Scheme

Policy Premium Breakdown

Premium
€857.88

Plus Government Levy
+ €444.00

Equals TOTAL PREMIUM
€1301.88

Less Group Discount
- €130.19

Equals GROSS PREMIUM
€1171.69

Less Your Tax Relief
- €200.00

Equals YOUR ANNUAL NET PREMIUM
€971.70

Your Payment Schedule

Due Date	€ Amount	€ Amount Paid	€ Amount To Pay
31/12/2019	€971.70	€971.70	€0.00

8 Quote & Purchase

8.1 Create a Quote

- 1 Click the Quotes & Purchase page from the main menu / toolbar.
- 2 Click the Create a Quote button.

Irish Life health

Home Policy Admin **Quote & Purchase** Documents Reporting My Account Log Out

Quotes and Purchasing

Quotes & Purchasing

Create a new quote and policy or retrieve a previously created quote.

2 Create a quote

Notice the 4 stages in the quote process.



- 3 Click the Select a Scheme drop-down list and choose the relevant scheme. Alternatively, select Direct from the drop-down list.
- 4 Select an Affinity – if applicable.

* denotes a required field.

Scheme

Select a Scheme*

3 Direct

Please select "Direct" if no scheme is applicable.

Affinity Group

Select an Affinity

4

Please select an Affinity grouping if applicable for this quote. Leave blank if not applicable.

5	Complete the Policy Start Date.
6	Choose the Plan.
7	Complete the personal and contact details fields.
8	Select the member's preference for document delivery (Post or E-Doc).
9	The option to suppress quotation documents. This is useful if you are creating a number of quotations and do not want multiple quotations to issue to the customer.

Policy Start Date

Select a Policy Start Date*

 5

Policy Holder Details

Plan* 6

7 Title*

First Name*

Surname*

Date of Birth*

Email*

Address *

Address (Line 2)*

Address (Line 3)

County*

Contact Number*

PPSN (Valid PPS numbers must contain uppercase letters)

Staff Number

Cost Centre Number

Document Delivery Method 8

Suppress Quote Documents 9

Document Delivery Method 6

Suppress Quote Documents

10	Complete the Previous Health Insurance question/s and click the Waiting Periods hyperlink in need.
11	Add more dependants using the Add Dependant button in need.
12	Tick the marketing consent – if applicable.
13	Tick the mandatory tickbox about the Membership Handbook and Terms of Business.
14	Click Get Quote.

Previous Health Insurance

Does your client have current or previous health insurance?

Yes
 No 10

Your client may be subject to waiting periods on their policy and claims made within applicable waiting periods may be declined.

[Find out more about waiting periods](#)

11
Add Dependant

12
 We would like to contact you to give you information and marketing materials about other products and services offered by us or other companies within the Irish Life Group. For this purpose we may pass your information to other companies within the Irish Life Group. We may use your details for this purpose for up to 12 months after your policy has ended. You might hear from us via land-line, mobile, post, email or SMS.

I have informed the policyholder of the detail provided in both the Membership Handbook and Terms of Business* 13

By continuing this process you are confirming that information provided is accurate and may be used by Irish Life Health for the purposes intended in accordance with our data protection statement.

14
Get Quote

The quote displays.

Note: you can create a new quote or edit the existing quote or purchase the quote.

15

To purchase the policy, click Continue to Payment

Policy Details

Quote Number:
Start Date: 21/05/2020
End Date: 30/12/2020
Gross Premium Group: €648.00
Gross Premium Member: €238.50
Average Monthly Payment: €19.88

Policy Holder Details

Name: COD FISH
Email: TEST@ILH.IE
Home Phone:
Work Phone:
Mobile Phone:
Address 1: 78 XXXX
Address 2: 78 XXXX
Address 3:
County: Co Carlow

Insured Member(s)

Title	Name	Plan	Packages	DOB	Relationship	Total Premium	Government Levy	Total
Mrs	COD FISH	Be Fit 1		23/05/1974	Policyholder	€1,009.24	€275.55	€886.50

Premium Breakdown

Name	Premium	Risk Equalisation Premium Credit	Levy	Gross Premium	Group Discount	LCR Loading	Net Premium	Your Tax Relief	Amount You Pay
COD FISH	€1,009.24	€0.00	€275.55	€1,009.27	€0.00	€0.00	€1,009.24	€122.74	€886.50



Create a new quote



Edit this quote

15

Continue to Payment

16	Click the Direct Debit radio button if the policyholder is opting to pay monthly. Or click the Credit Card radio button if the policyholder is opting to pay annually in advance. Complete the details required.
17	Tick the mandatory acknowledgement statements.
18	Click Submit Payment.

The screenshot shows a payment form with two radio buttons at the top: 'Direct Debit' (selected) and 'Credit Card'. A yellow callout '16' points to the 'Direct Debit' radio button. Below this is a section titled 'Direct Debit' containing three input fields: 'Account Name*', 'IBAN*', and 'Collection Day*' (a dropdown menu with 'Please Select' as the current selection). Below the input fields is a checkbox with the text 'I confirm that this account accepts Direct Debits and I am the only person required to authorise Direct Debits from this account.*'. A yellow callout '17' points to this checkbox. At the bottom of the form is a green button labeled 'Submit Payment' with a yellow callout '18' pointing to it.

8.2 Retrieve a Previously Created Quote

Note	Click the Qutoes & Purchase page from the main menu / toolbar.
1	View the list of active new business quotes.
Note	You may the option to enter search criteria in the Search within results field to find a particular quote.
2	Click the Policy Number hyperlink to open a previously created quote.
Note	<p>You will have the option to create a new quote, edit the existing quote or purchase the existing quote.</p> <p>If you click Edit this Quote option, an editable version of the quote opens and you can amend the quote following the steps already shown above.</p> <p>For example, if you suppressed the documentation the first time you created the quote, you can now issue the quotation.</p>

Quotes and Purchasing

Quotes & Purchasing

Create a new quote and policy or retrieve a previously created quote.

Create a quote

This is a list of active new business quotes for your clients.

Policy Number	Name	Start Date	€ Annual Premium	Renewal Date
2 P1	CON CONWAY	03/02/2021	€845.90	03/02/2022

9 Documents

1	Click the Documents page from the main menu / toolbar.
Note	The period from and to will automatically have the last 12 months dates as a preset setting.
2	Choose the Scheme you would like to view documents for from the Select Scheme dropdown list.
3	Change the Period From and Period To dates, if required.
4	Click the Search button.
5	You have the option to Search within the results using the Search field.
6	Click the View button of the document you would like to open. This will open in a separate tab.
7	There may be more documents on subsequent pages in the results table.



2

Broker

Welcome to the documents area. **This displays documents from the last 12 months.** To view older documents use the dates to filter and then use the search box to filter further if required.

Select Scheme:

Period From

Period To

Search

Search

Name	Date	
Payment Receipt	14/12/2020	view
Your Scheme Renewal	13/12/2020	view
Payment Receipt	03/11/2020	view
Payment Receipt	02/11/2020	view
Payment Receipt	29/09/2020	view
Payment Receipt	29/09/2020	view
Payment Receipt	04/09/2020	view
Payment Receipt	13/08/2020	view
Payment Receipt	25/06/2020	view
Payment Receipt	20/05/2020	view

7

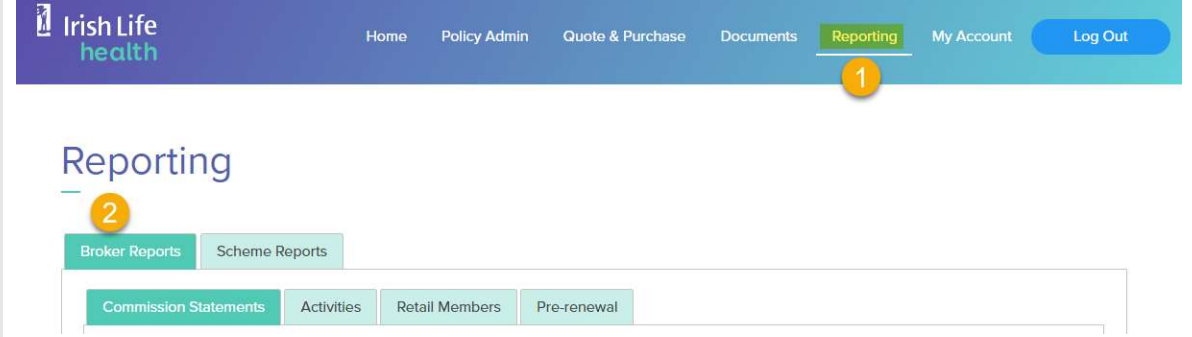
Prev 1 2 Next

10 Reporting

10.1 Broker Reports

10.1.1 Commission Statements

1	Click the Reporting page from the main menu / toolbar.
2	Click the Broker Reports tab to view the 4 tabs: <ul style="list-style-type: none">• Commission Statements• Activities• Retail Members• Pre-renewal



3	The Commission Statements tab shows a list of your commission statements to date. Note , you can search within the list using the Search box.
4	Click the View button under the View Document column to open the Commission Statement.
5	Click the Copy button to copy the Commission Statements list.
6	Click the Excel button to export the Commission Statements list to excel.
7	More documents are available on subsequent pages.
Note	Commissions Statements are password protected. Only users who know the password can open these.

The screenshot shows the 'Commission Statements' tab selected in a navigation bar. Below the tab, the heading 'Commission Statements' is followed by a sub-heading 'A list of your commission statements to date'. There are two buttons, 'Copy' and 'Excel', and a search box. A table lists commission statements with columns for 'Created Date', 'Document Name', and 'View Document'. The first row is highlighted, and the 'View' button in the 'View Document' column is circled. At the bottom, there is a pagination control showing 'Showing 1 to 10 of 63 entries' and a series of page numbers from 1 to 7, with '1' being the active page.

3 Commission Statements

A list of your commission statements to date

5 Copy **6** Excel Search:

Created Date	Document Name	View Document
2018-10-16	Commissions Statement September 2018.xls	4 View
2018-10-18	Commissions Statement September 2018.xls	View
2017-11-08	Commissions Statement September 2017.xls	View
2016-10-19	Commissions Statement September 2016.xls	View
2015-10-14	Commissions Statement September 2015.xls	View
2014-10-17	Commissions Statement September 2014.xlsx	View
2019-11-15	Commissions Statement October 2019.xls	View
2018-12-20	Commissions Statement October 2018_14770410.xls	View
2017-11-22	Commissions Statement October 2017.xls	View
2016-11-16	Commissions Statement October 2016.xls	View

Showing 1 to 10 of 63 entries **7** Previous 1 2 3 4 5 6 7 Next

10.1.2 Activities

1	Click the Activities tab to view activities on your clients' policies per month.
2	Click to select the month.
3	Click to select the year.
4	Click the Get Policy Activities button. The policy activities for the month and year selected will be displayed.
5	Click the Excel button to export the Activities list to excel. Click the Copy button to copy the Activities list.
6	More activities are available on subsequent pages.
7	Use the Search functionality to find a specific result.
8	Click the Policy link to view the individual policy activity.

Commission Statements **Activities** Retail Members Pre-renewal

Policy Activities

Select a month and year to view activities on your clients policies for that month.

Jan 2021 **Get Policy Activities**

Copy Excel Search:

Details	Date of activity	Policy Number	Member Number	Name	Role
Add Member	2021-01-01	[Link]	[Redacted]	[Redacted]	Adult Dependand
Add Member	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Add Member	2021-01-01	[Link]	[Redacted]	[Redacted]	Spouse / Partner
Add Member	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Spouse / Partner
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder
Renewal	2021-01-01	[Link]	[Redacted]	[Redacted]	Policyholder

Showing 1 to 10 of 11,980 entries

Previous **1** 2 3 4 5 ... 1,198 Next

If you click the Excel button, the Activities List will be downloaded as an Excel document.

9 Click the Excel document in the downloads folder.

10 The Excel document will open showing all the activities for the year and month selected.

Showing 1 to 10 of 22,777 entries

Previous 1 2 3 4 5 ... 2278 Next

9 Reporting - ILH Liv...xlsx

10

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10.1.3 Retail Members

1 Click the Retail Members tab to view a listing of all policies that are not categorised under a specific scheme.

2 Click the Get Retail Member Listing button.

3 Click the Excel button to export the list to excel.
Click the Copy button to copy the list.
You can also Search within the results.

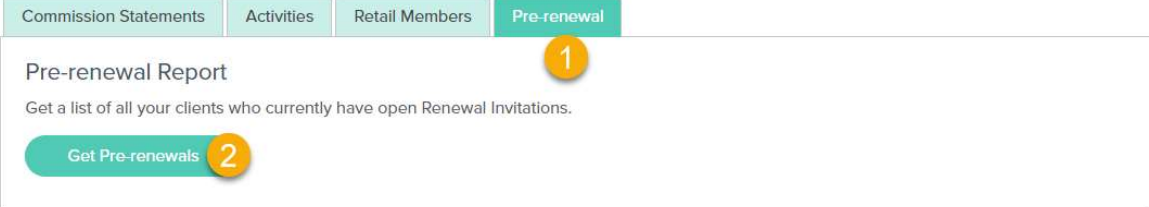

4 More activities are available on subsequent pages.

5 Click the Policy link to view the individual policy activity.

If you click the Excel button, the Activities List will be downloaded as an Excel document.

Scheme Code	Scheme Name	Member Number	Policy Number	Staff Number	First Name	Last Name	Member Type	Renewal Date
00000	Direct				Fcbdmvzvd	Acztmp	Policyholder	2021-05-11
00000	Direct				Ebfllr	Vkbnip	Policyholder	2021-06-01
00000	Direct				Fcbdmvzvd	Ljhdk	Policyholder	2021-05-10
00000	Direct				Vsixym	Ljhdk	Spouse / Partner	2021-05-10
00000	Direct				Gbztmug	Qbzfn	Policyholder	2021-05-18
00000	Direct				Cbgemb	Qbzfn	Spouse / Partner	2021-05-18
00000	Direct				Znbno	Zxbyn	Policyholder	2021-05-10
00000	Direct				Lnbd	Zxbyn	Child Dependant	2021-05-10
00000	Direct				Okiz	Zxbyn	Child Dependant	2021-05-10
00000	Direct				Hncwa	VoSddie	Policyholder	2021-05-10

10.1.4 Pre-Renewals

1	Click the Pre-renewals tab to view Pre-renewal Report for members who are not linked to a specific scheme.
2	Click Get Pre-renewals button.
	
3	The list of all your clients who currently have open Renewal invitations will be displayed.
4	Click the Excel button to export the list to excel. Click the Copy button to copy the list. You can also Search within the results.
5	More activities are available on subsequent pages.
6	Click the Policy link to view the individual policy activity.
	

10.2 Scheme Reports

10.2.1 Scheme Invoices report

1	Click the Reporting page from the main menu / toolbar.
2	Click the Scheme Reports tab.
3	Click the scheme drop-down list and click a scheme to open the scheme report.
4	Click the Show the Reports button.

Irish Life health

Home Policy Admin Quote & Purchase Documents Reporting My Account Log Out

Reporting

Broker Reports Scheme Reports

Select the scheme to run reports

Select Scheme

Show the reports

5

There are 5 reports – each displayed as a tab for schemes:

- Invoices
- Activities
- Member Listing
- Pre-renewal
- Waiting Periods
- End of Year Premiums

Invoices Activities Member Listing Pre-renewal Waiting Periods End of Year Premiums

Scheme Invoices

A list of your invoices. Drill down to view policy or member level details for each invoice.

For larger schemes the member and policy level invoice breakdown may take a while to load.

Note	The first tab (Invoices) shows a list of invoices for the scheme.
6	Click the Excel button to export the Scheme invoices list to excel. Click the Copy button to copy the list.
7	Each invoice can be viewed at Member Level.
8	Or at Policy Level.
9	Click the Open button to open the invoice.
10	More documents are available on subsequent pages.

5 Invoices Activities Member Listing Pre-renewal Waiting Periods Waiting Periods End of Year Premiums

Scheme Invoices

A list of your invoices. Drill down to view policy or member level details for each invoice.

For larger schemes the member and policy level invoice breakdown may take a while to load.

Copy Excel **6** Search:

Invoice Number	PO Number	Date From	Date To	Amt Due	Due	Member Level	Policy Level	View Invoice
						7 View	8 View	9 Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open
						View	View	Open

Showing 1 to 10 of 38 entries **10** Previous 1 2 3 4 Next

10.2.2 Scheme Activities report

1	Click the Activities tab to view activities on your scheme members per month.
2	Click to select the month.
3	Click to select the year.
4	Click the Get Policy Activities button. The policy activities for the month and year selected will be displayed.

5	Click the Excel button to export the Activities list to excel. Click the Copy button to copy the Activities list.
6	More activities are available on subsequent pages.
7	Click the Policy link to view the individual policy activity.

Details	Date of activity	Policy Number	Member Number	Name	Date of Birth	Role	Plan
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Policyholder	Better Select ILH
New Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Policyholder	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Policyholder	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Policyholder	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Spouse / Partner	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Child Dependand	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Policyholder	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Spouse / Partner	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Child Dependand	Better Select ILH
Renewed Member	2021-01-01	[Link]	[ID]	[Name]	[DOB]	Child Dependand	Better Select ILH

10.2.3 Member Listing Report by Scheme

1	Under Scheme Reports,
2	Select the Scheme, and
3	Click the Member Listing tab, and
4	Click Get Member Listing.

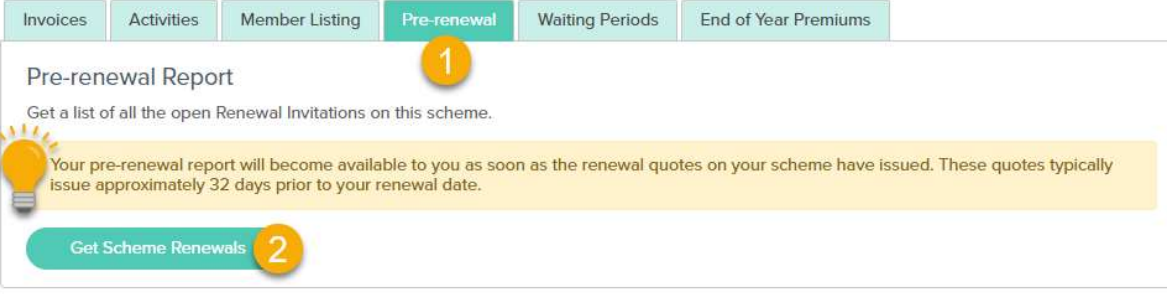

The screenshot shows the 'Reporting' section of the system. At the top, there are two tabs: 'Broker Reports' and 'Scheme Reports', with 'Scheme Reports' being the active tab and marked with a yellow circle '1'. Below this, there is a text input field labeled 'Select the scheme to run reports' with a dropdown arrow, marked with a yellow circle '2'. A green button labeled 'Show the reports' is positioned below the input field. Underneath, there is a row of sub-tabs: 'Invoices', 'Activities', 'Member Listing', 'Pre-renewal', 'Waiting Periods', and 'End of Year Premiums'. The 'Member Listing' tab is selected and marked with a yellow circle '3'. Below the sub-tabs, there is a heading 'Member Listing' and a sub-heading 'Get an up to date list of all members (and dependants) on the scheme.' A green button labeled 'Get Member Listing' is at the bottom, marked with a yellow circle '4'.

5 You can copy or export the listing to Excel as with all other reports. Click the Copy or Excel buttons or Search within the results.

6 Click a Policy Number to access that policy.

The screenshot shows a data table with the following columns: Scheme Code, Scheme Name, Member Number, Policy Number, Staff Number, First Name, Last Name, Date of Birth, Member Type, Renewal Date, Start Date, End Date, FTE, Plan, LCR, Total Gross Premium, Total TSE, Total Net Premium, Long Amount, Gross Premium Group, TSE Group, Net Premium Group, Gross Premium Member, TSE Member, NetPremium Member, Staff Number, and Joined Date. The table contains several rows of data. A yellow circle '6' highlights the 'Policy Number' column in the second row. At the top of the table, there are 'Copy' and 'Excel' buttons and a search bar, with a yellow circle '5' highlighting the search bar. At the bottom of the table, there is a pagination control showing 'Showing 1 to 10 of 107 entries' and a set of page numbers (1, 2, 3, 4, 5, ..., 15, Next).

10.2.4 Pre-Renewal Report by Scheme

1	Click the Pre-renewals tab to view Pre-renewal Report for the scheme.
2	Click the Get Scheme Renewals button.
	
3	The list of all the scheme members who currently have open Renewal invitations will be displayed.
4	Click the Excel button to export the list to excel. Click the Copy button to copy the list.
5	Click the Policy link to view the individual policy activity.
If you click the Excel button, the Activities List will be downloaded as an Excel document in the downloads folder.	
	

10.2.5 Waiting Period Report by Scheme

1	Under Scheme Reports,
2	With the relevant scheme selected,
3	Select the Waiting Period tab.
Note	<p>Always advise the waiting period by member type. You can search by member type to view all waiting periods for that member type.</p> <p>If an entry has a 0 as a value for a type of waiting period, this waiting period is waived for the member type.</p> <p>If a waiting period entry has a value (e.g.1825) for a member type, this indicates that the waiting period applies for that member type. The value is given in days. So, for example, the pre-existing condition waiting period is 1825 days in length – or 5 years.</p>
4	<p>Click the Excel button to export the list to excel. Click the Copy button to copy the list.</p>
5	More waiting periods data may be available on subsequent pages.
If you click the Excel button, the Activities List will be downloaded as an Excel document in the downloads folder.	

10.2.6 End of Year Premiums Report by Scheme

1	With the Scheme Reports tab open, and
2	The relevant scheme selected,
3	Click the End of Year Premiums tab, and
4	Click View Tax Rebate Report.


The screenshot shows the 'Scheme Reports' tab selected. A dropdown menu is open to select a scheme. Below it is a 'Show the reports' button. A secondary navigation bar includes 'End of Year Premiums', which is highlighted. Under this tab, there is an 'End of Year Premium Report' section with a 'View Tax Rebate Report' button.

5	Note that you can search within results, for example, by policy number.
6	Click the Policy Number link access that policy.
7	There may be more results on subsequent pages.
8	Click the Export to Excel button to export the list to excel.

If you click the Excel button, the Activities List will be downloaded as an Excel document in the downloads folder.

The screenshot displays a table with columns: Year, Policy number, Member name, Employee ID, Gross Premium, Tax Relief, and Net Premium. The 'Year' column contains multiple '2020' entries. An 'Export to Excel' button is located at the top left of the table area. A search bar is positioned above the table. A pagination bar at the bottom shows 'Showing 1 to 10 of 149 entries' and navigation options: Previous, 1 (highlighted), 2, 3, 4, 5, ..., 15, Next.

11 Troubleshooting

1. Is it possible to delete a quotation?
No.
2. I get an error message when I try to view a policy.
This error usually indicates that you do not have access to view the policy. Contact us and we can try to help you resolve this issue.

3. I tried to carry out an endorsement or change to a policy and it wouldn't go through.
There may be an issue with the policy. Contact us and we will help you resolve the issue and carry out the change for you in need.