

# IRISH LIFE HEALTH

## LIVE USER GUIDE FOR SCHEME ADMINISTRATORS

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

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## 2 Introduction

The Irish Life Health application is designed to enable Scheme Administrator to manage their schemes. The functionality includes giving you – as an Irish Life Health Scheme Administrator – the ability to:

- Purchase new policies and add members to your schemes;
- 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 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/vihlive](http://www.irishlifehealth.ie/portal/vihlive)

### 3 Registering as an Existing User

<b>Note</b>	<ul style="list-style-type: none"><li>a) This is a once-off step to register for the Irish Life Health Live portal for existing portal users. All existing scheme admin 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.</li><li>b) <b>Important:</b> you may have already used the <b>same email address</b> 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 <b>do not need to re-register</b>. Simply login using the email address and password you use for the member portal and enter your scheme admin member number to access your portfolio of customers on the Irish Life Health Live application.</li><li>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 scheme admin to access your admin portal, please follow the steps below to register.</li><li>d) Irish Life Health have introduced an extra step for our scheme admins 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.</li></ul>
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3.1	Enter the Irish Life Health Live address in your addresss bar and press Enter.
3.2	Enter your: <ul style="list-style-type: none"> <li>• Email address</li> <li>• Create a password that matches the requirements listed:             <ul style="list-style-type: none"> <li>○ At least 8 characters</li> <li>○ Uppercase, lowercase &amp; numbers</li> <li>○ At least one special character</li> </ul> </li> </ul>
3.3	Click Register account.

<b>Notes</b>	The email address being used to register must match what Irish Life Health has on record for you as a scheme admin.
--------------	---



## 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](mailto:heretohelp@irishlifehealth.ie) or call us on 01 562 5100.

Yours sincerely,

Irish Life Health

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# 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 →

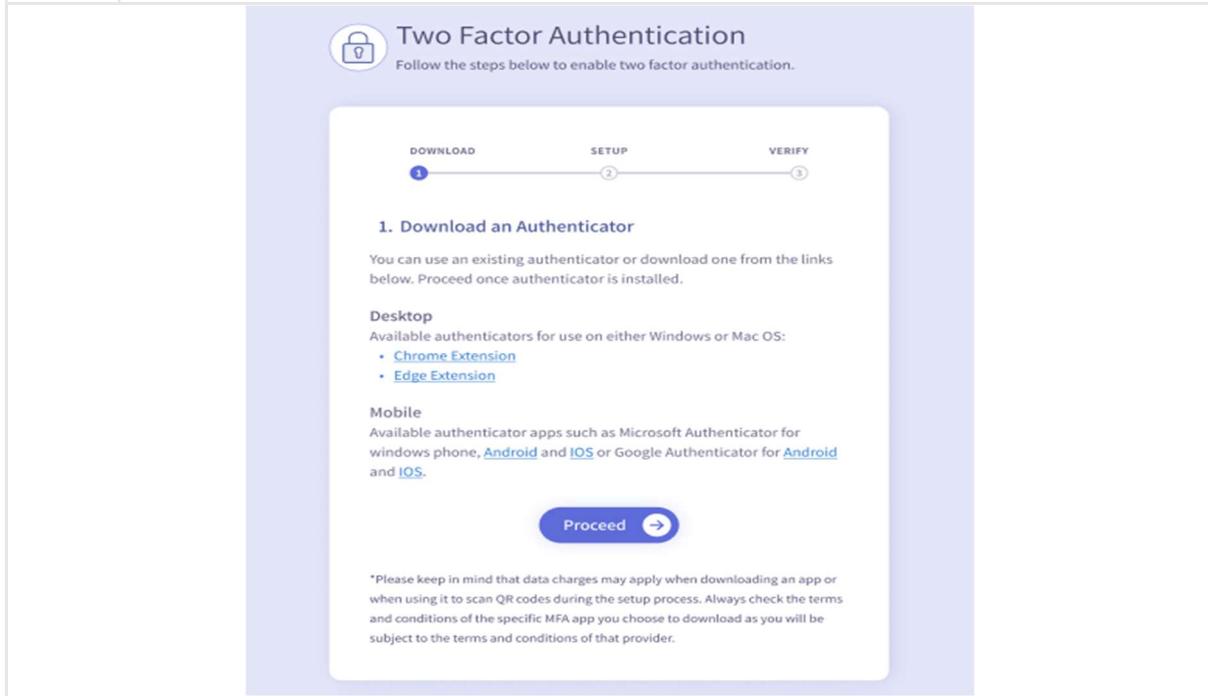
[Not registered? Register here](#)

Irish Life Health Member portal

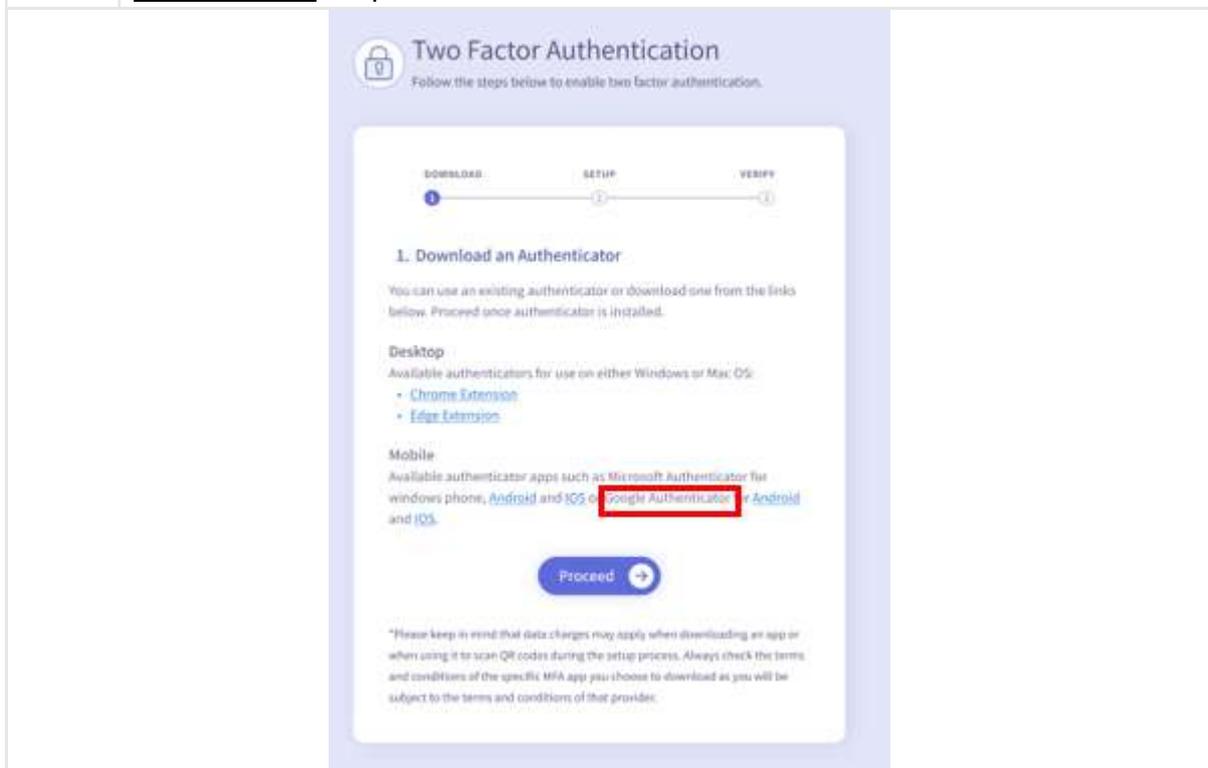
Members can login to their portal here.

Login →

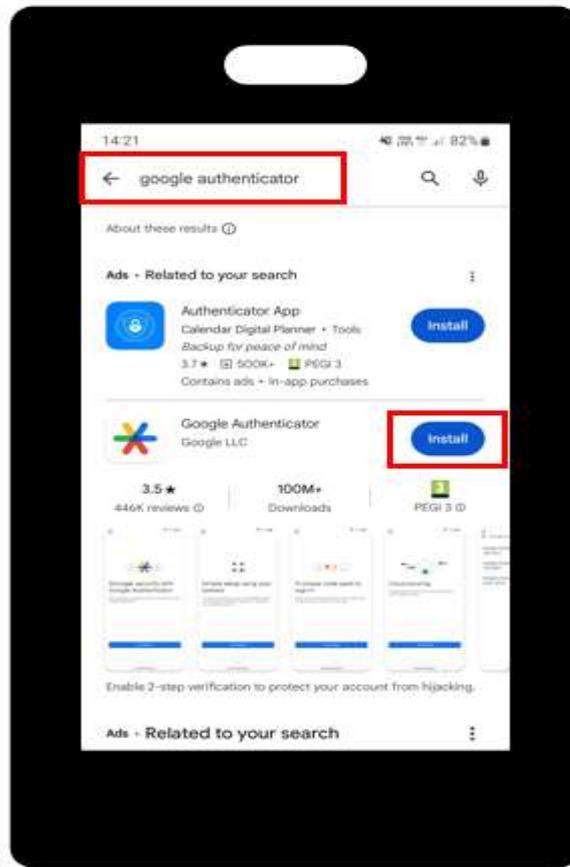
- 3.4** When logged in you will be prompted to complete the setup of a two-factor authenticator.  
This is a one time setup process.
- If you already have an authenticator you can proceed to the next step.
  - If you don't have an authenticator, follow steps to download.



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



**3.6** Download the authenticator on your mobile device.



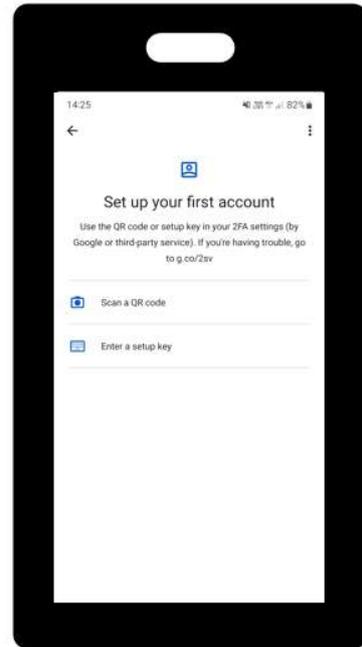
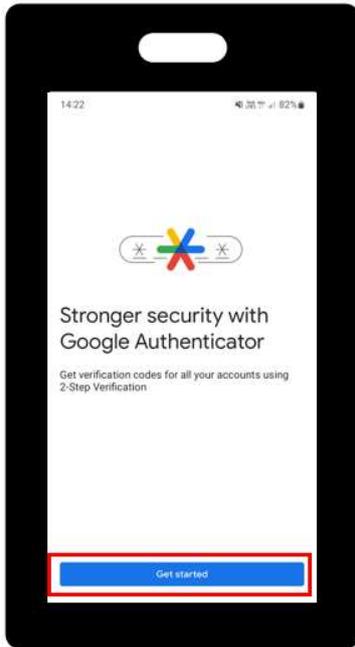
**3.7** Open the app store on your mobile device, search for “Google Authenticator” and Install.

**3.8** 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”



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

**Two Factor Authentication**  
Follow the steps below to enable two factor authentication.

DOWNLOAD (1)      SETUP (2)      VERIFY (3)

### 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](#)

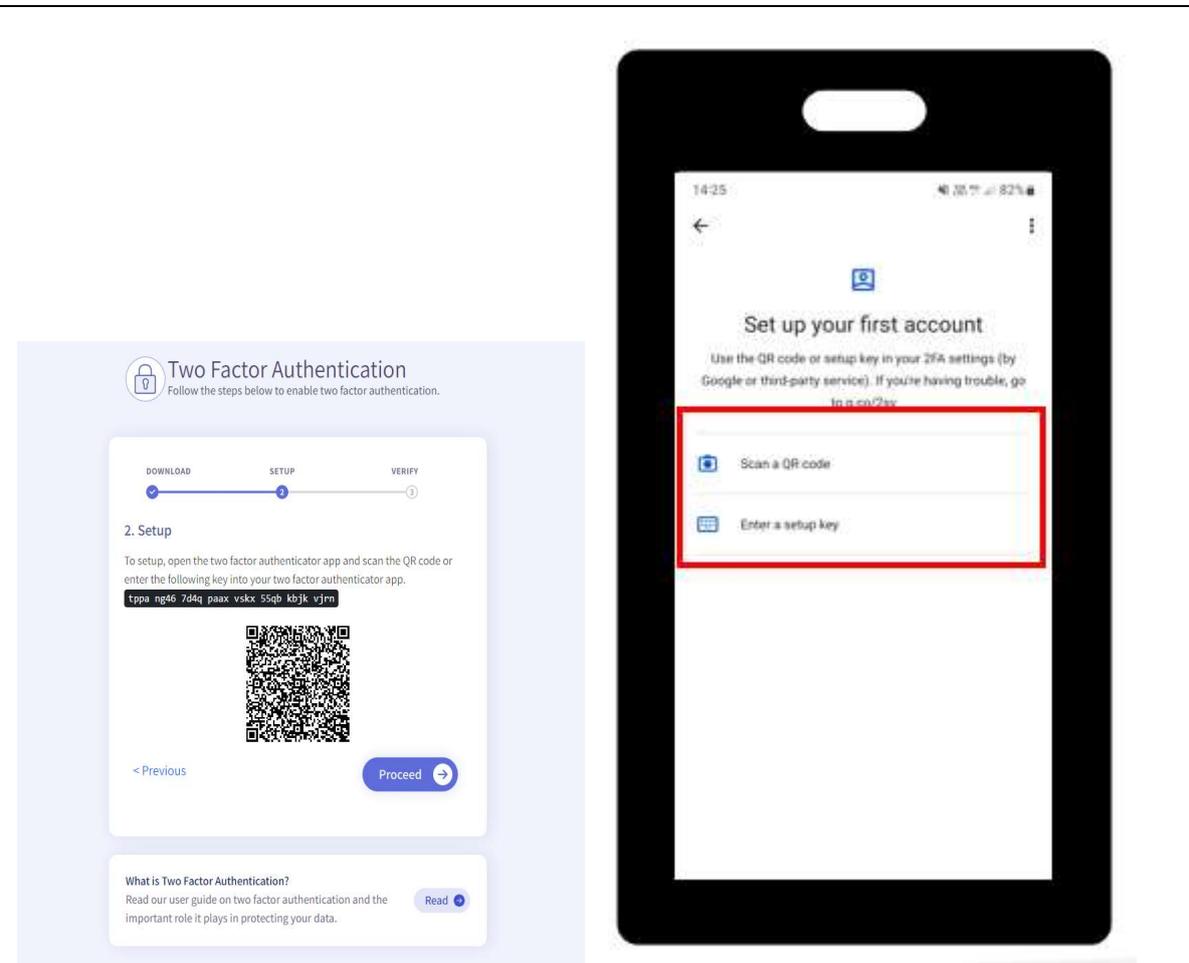
**Mobile**  
Available authenticator apps such as Microsoft Authenticator for windows phone, [Android](#) and [IOS](#) or Google Authenticator for [Android](#) and [IOS](#).

**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.

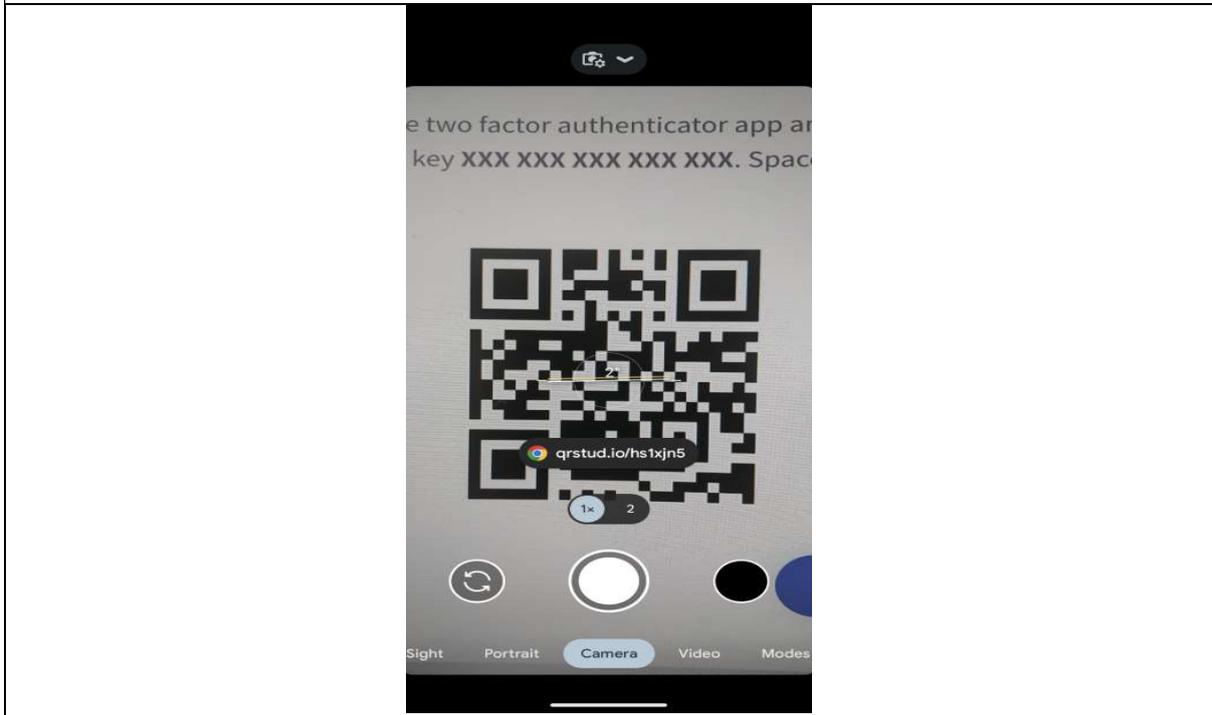
**3.10** You can setup the authenticator by:

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



### 3.11 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.



### 3.12 Setup the authenticator [Manual Option]

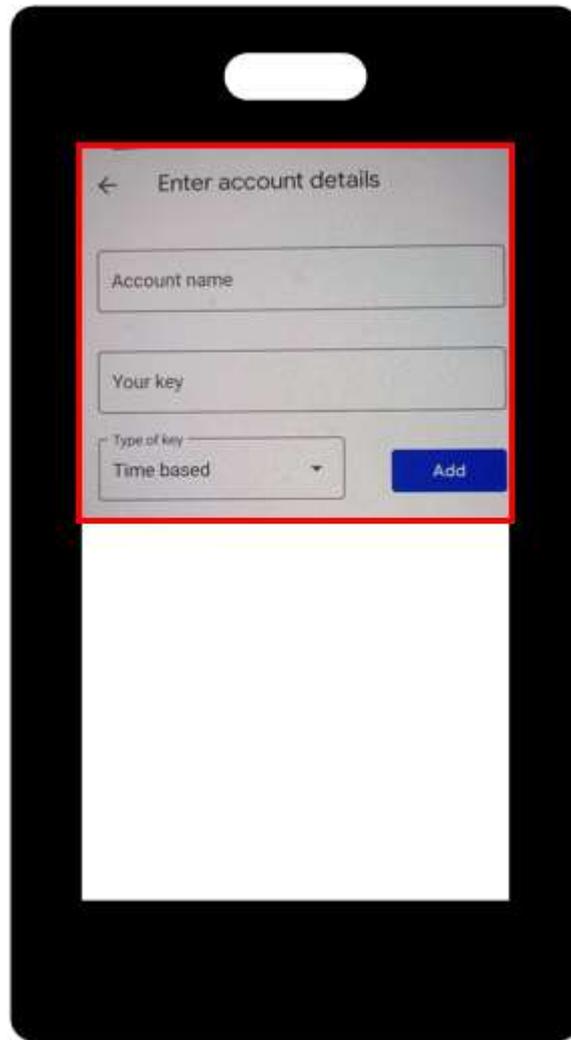
Select "Enter a setup key" option

Enter the account details requested and click Add.

- **Account Name:** "Irish Life Health Live"

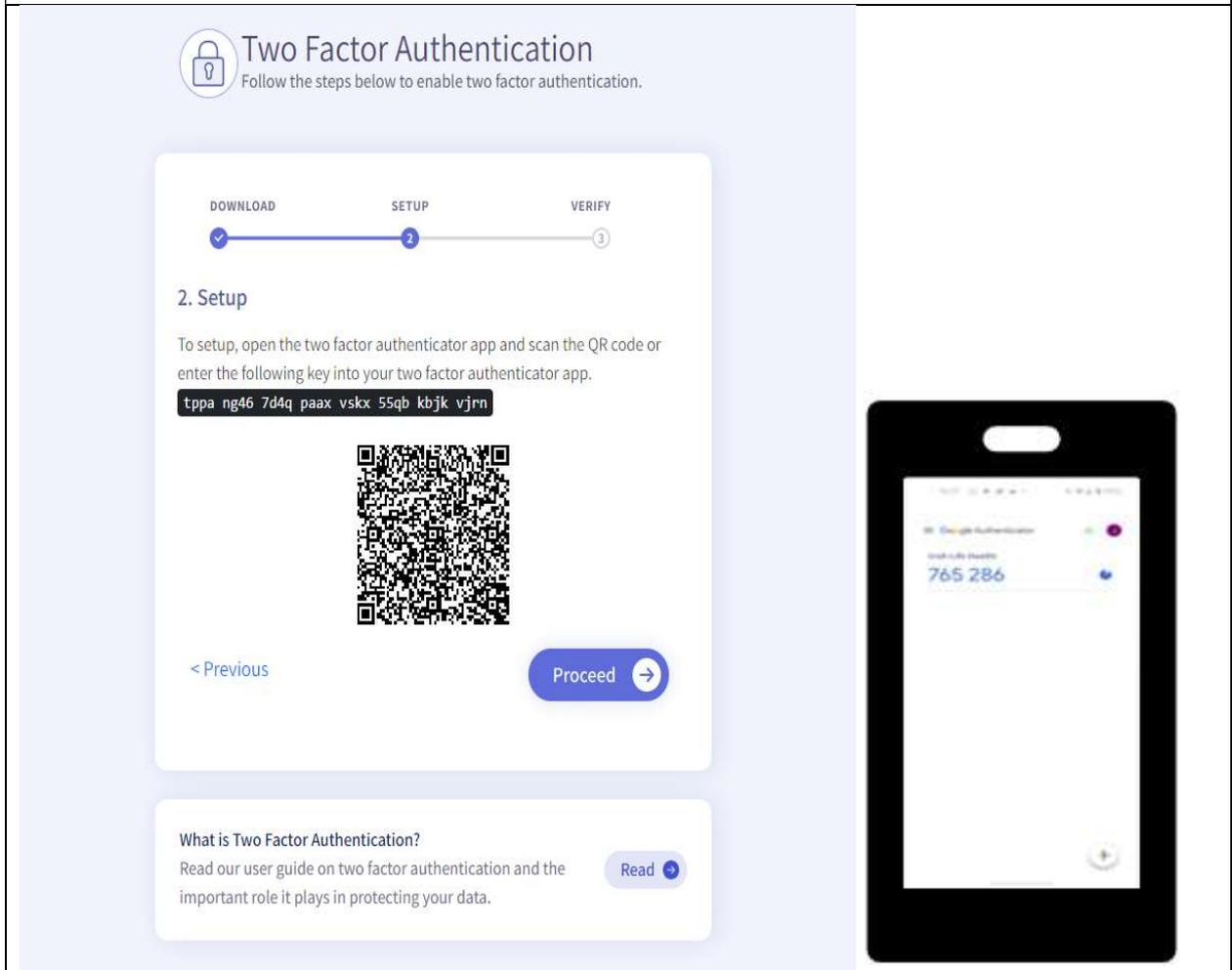
- **Your Key:** Enter the 32-digit secret key from the setup page

- **Type of Key:** Time based



**3.13 Success.** You have setup the authenticator.

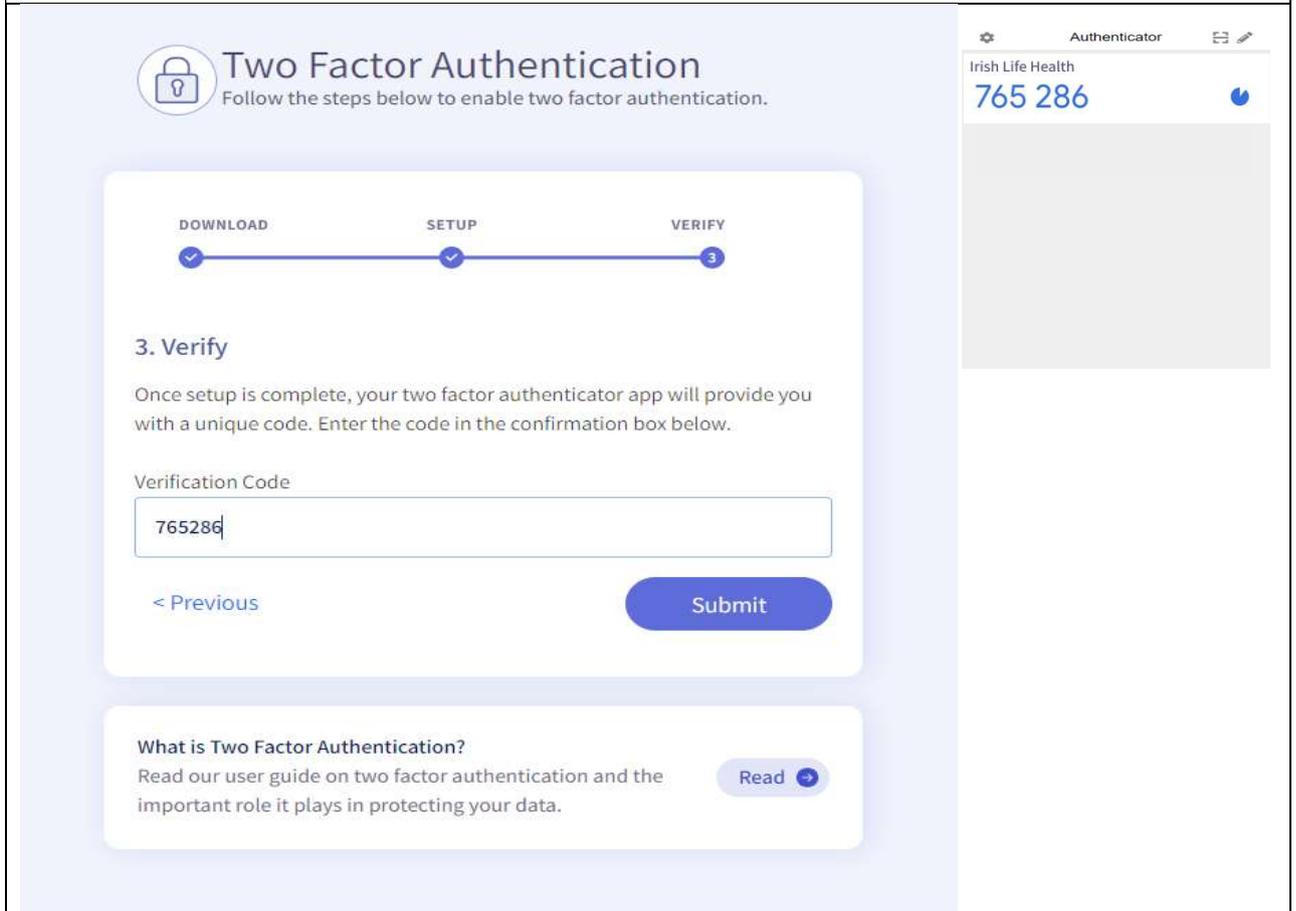
The authenticator will immediately show a 6-digit code which will refresh periodically. Click "Proceed" to move to the Verify screen.



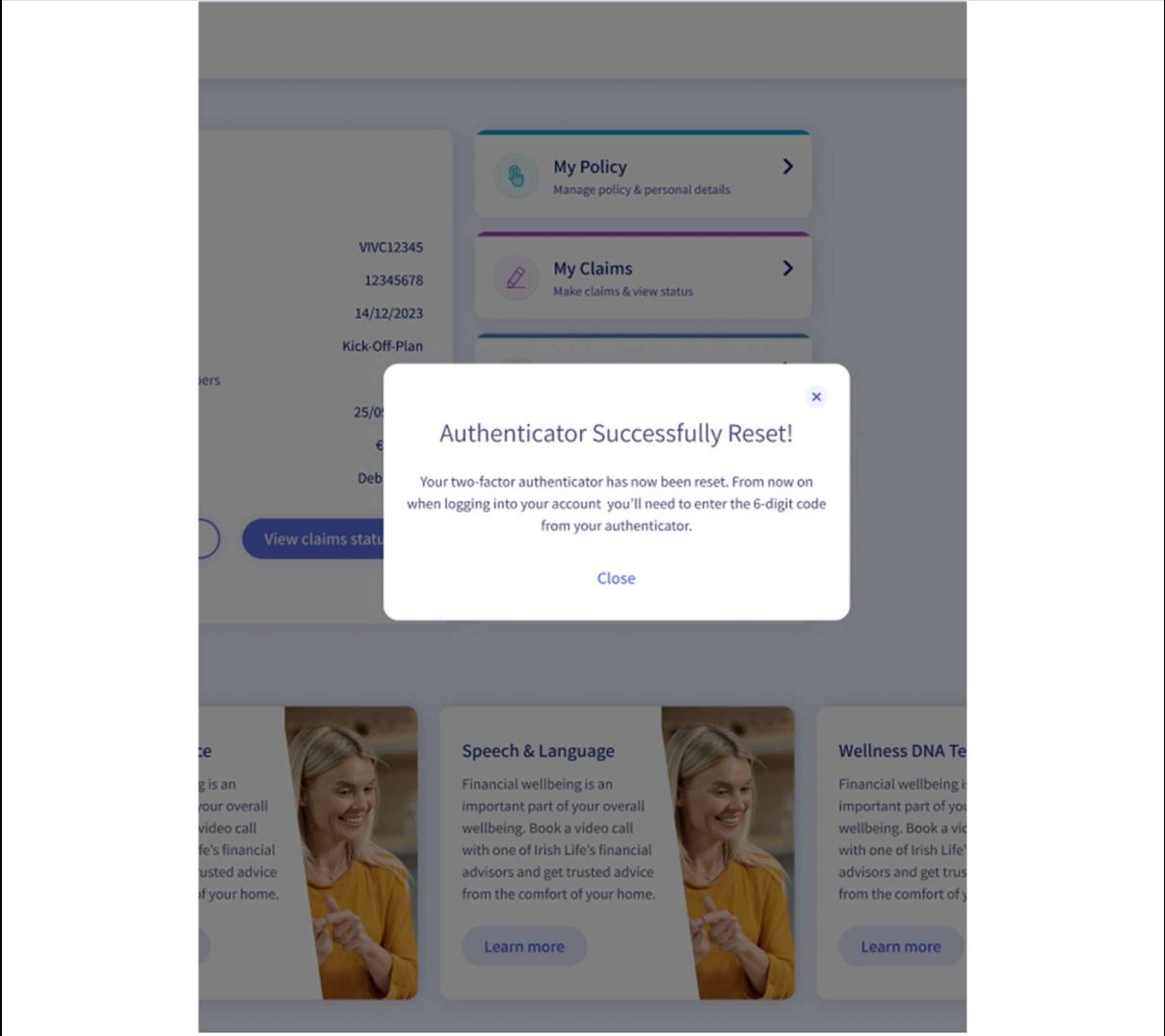
**3.14** Enter the 6-digit authentication code into the verification code box on the Verify screen and select “Submit”.

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.

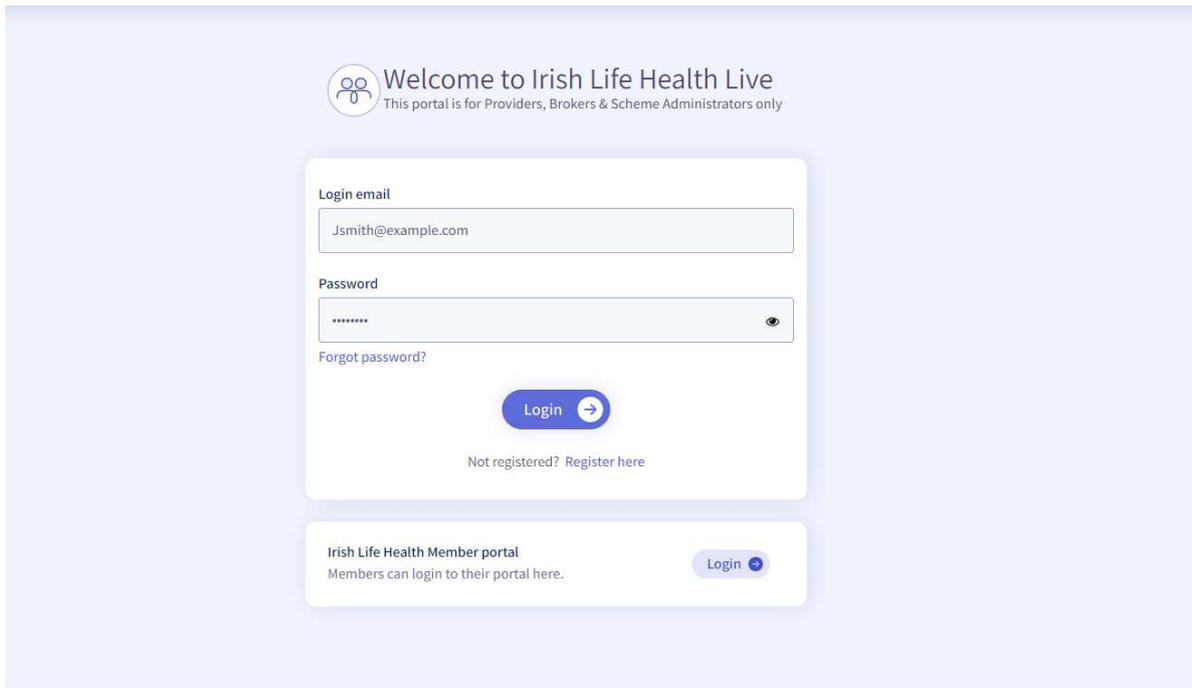


**3.15 Success.** You have verified the authenticator and this one-time setup is complete. Keep your authenticator safe as you will be required to enter the 6-digit authentication code every time you login.



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

<b>3.2</b>	Login using your existing username and password as normal.
<b>3.2.1</b>	Enter your: <ul style="list-style-type: none"><li>• Email address</li><li>• Password</li></ul>
<b>3.2.2.</b>	Click Login.



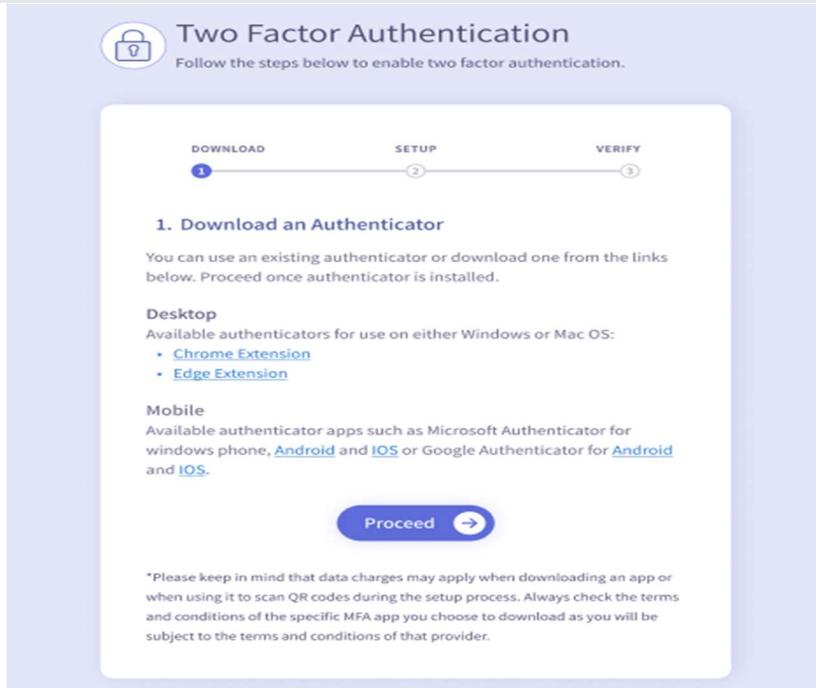
<b>Notes</b>	The email address being used to register must match what Irish Life Health has on record for you as a scheme admin.
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### 3.2.3

When logged in you will be prompted to complete the setup of a two-factor authenticator.

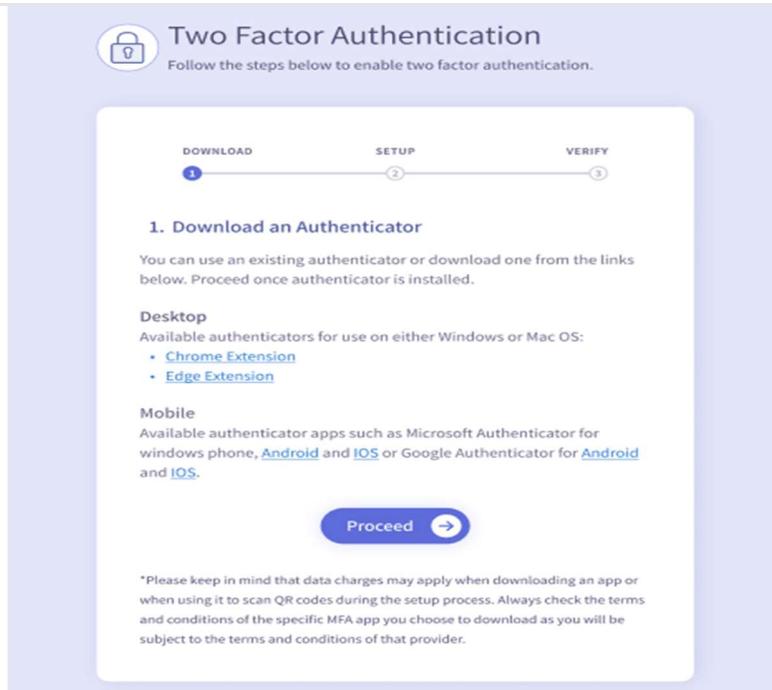
This is a one time setup process.

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



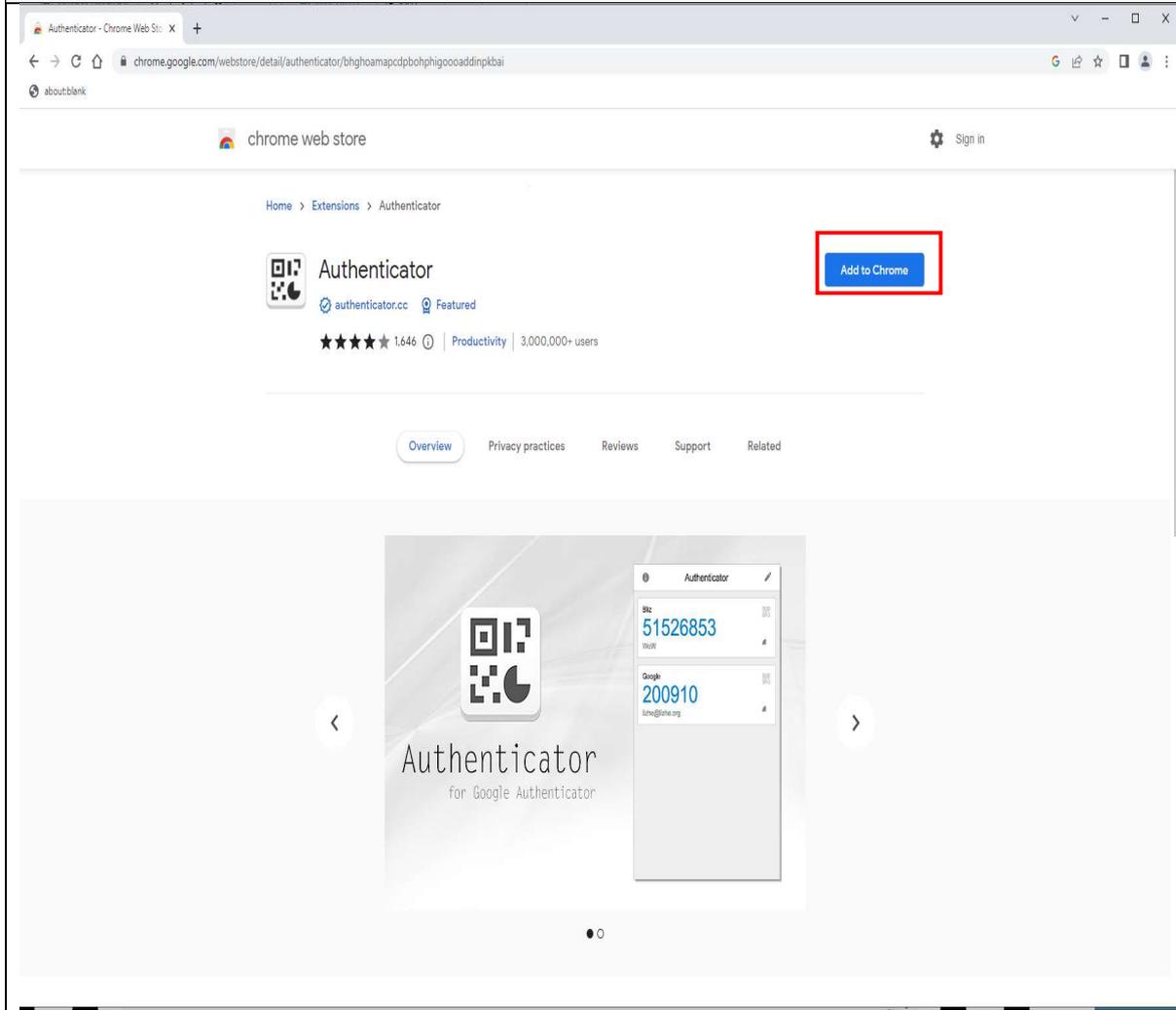
### 3.2.4

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

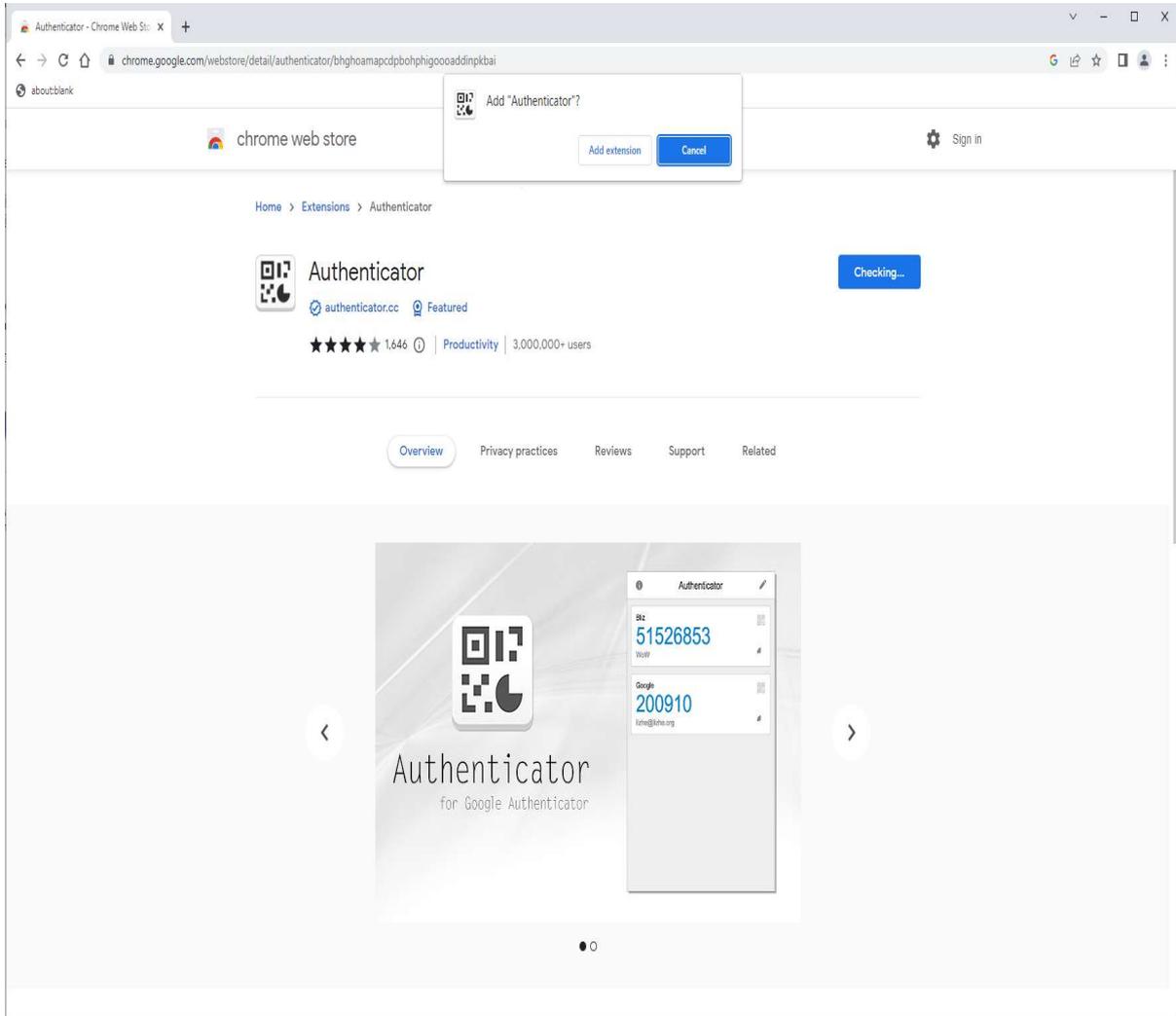


N.B. Whichever authenticator app you choose, you will be subject to the Terms of Use of that provider.

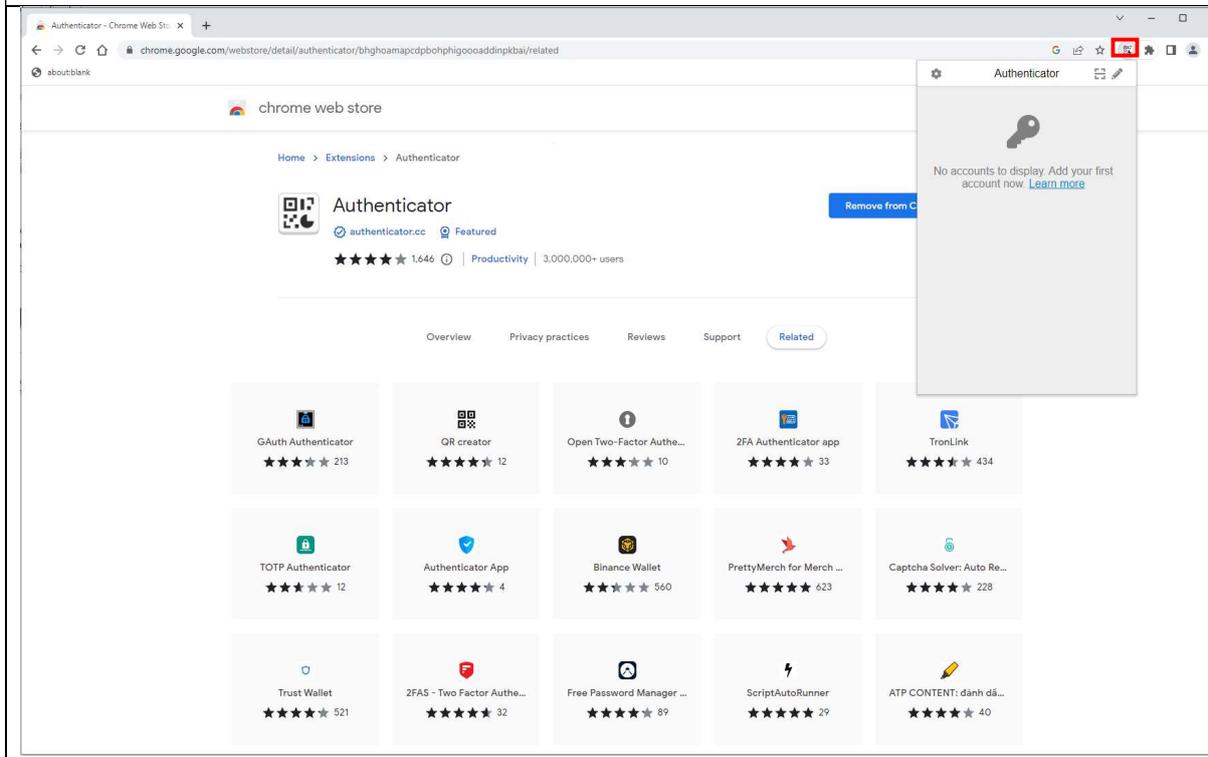
**3.2.5** The download page for the Chrome extension will open from the link.  
Select the blue “Add to Chrome” button on screen.



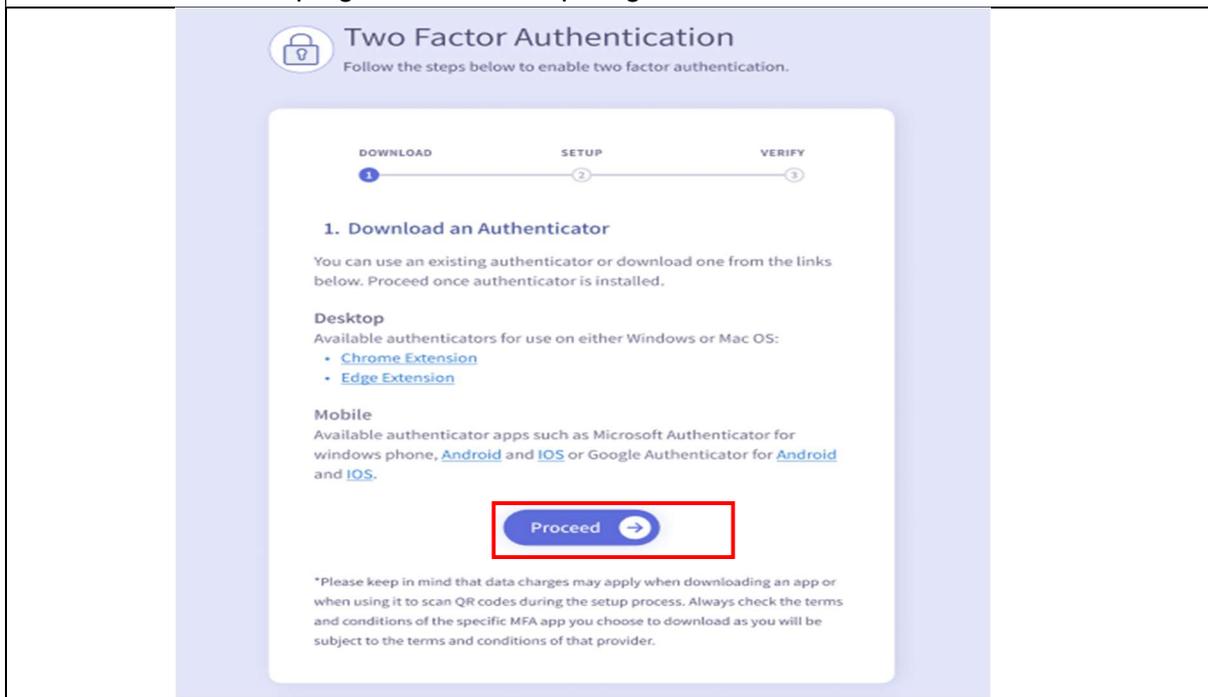
**3.2.6** Download the authenticator extension to your desktop.  
Select the grey “Add Extension” button in the pop-up screen.



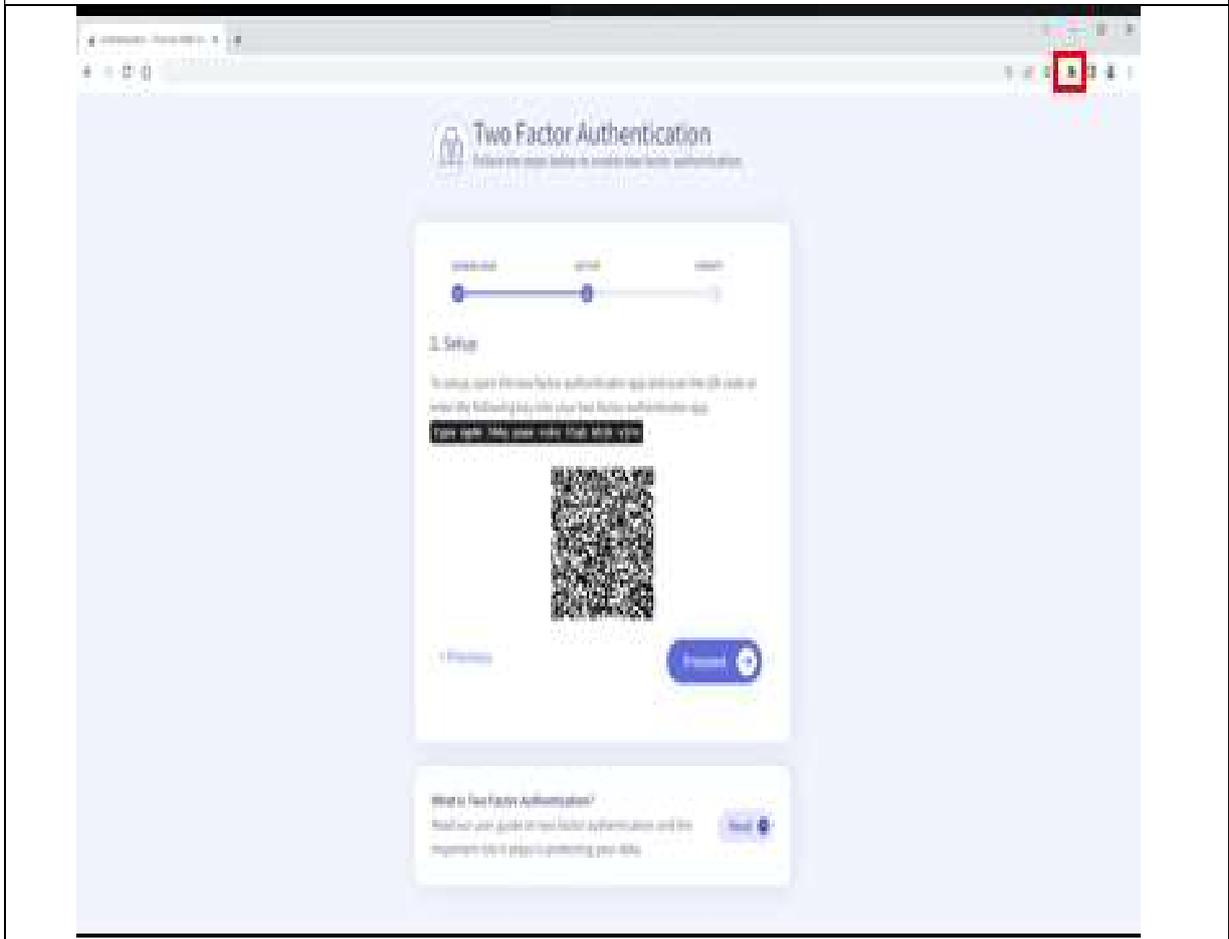
**3.2.7** To open, this can be found in the extension toolbar to the right of the address bar at the top of the screen.  
Next you need to go back to the portal to complete setup.



**3.2.8** Success. You have downloaded the authenticator to your desktop browser.  
Click "Proceed" to progress to the Setup stage.

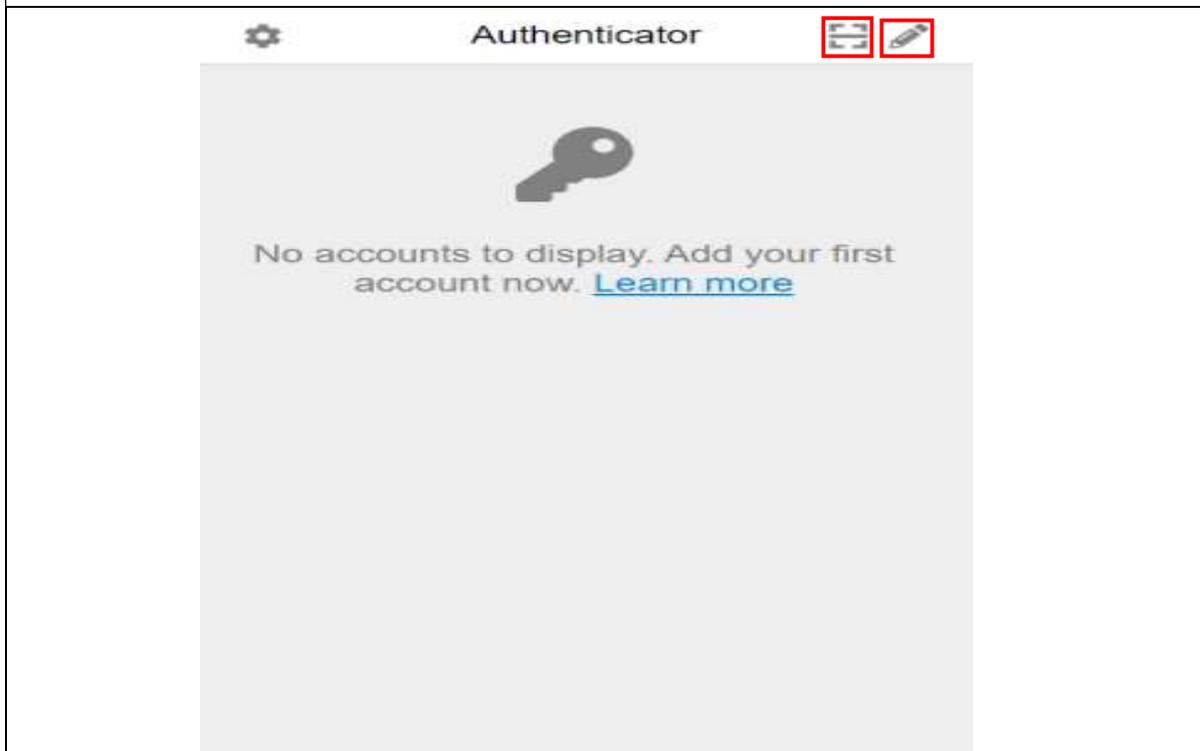


**3.2.9** Navigate to the browser extension toolbar and open the authenticator.  
This can be found in the extension toolbar to the right of the address bar at the top of the screen.



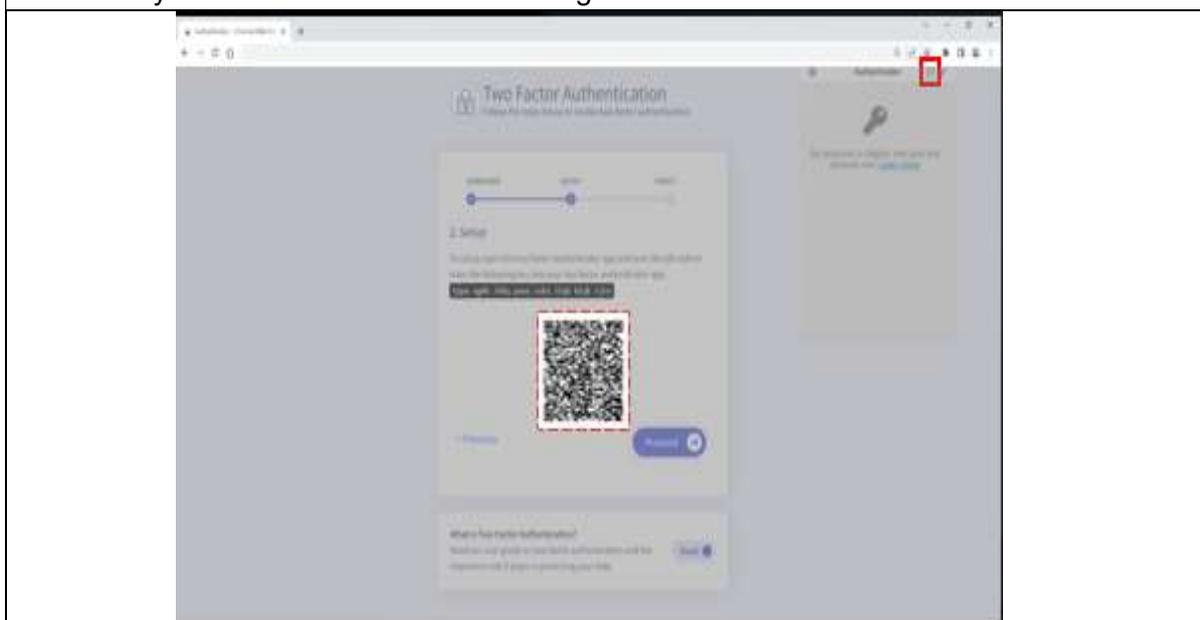
**3.2.10** You can setup the authenticator by scanning the QR code or manually entering the 32-digit Secret Key.

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



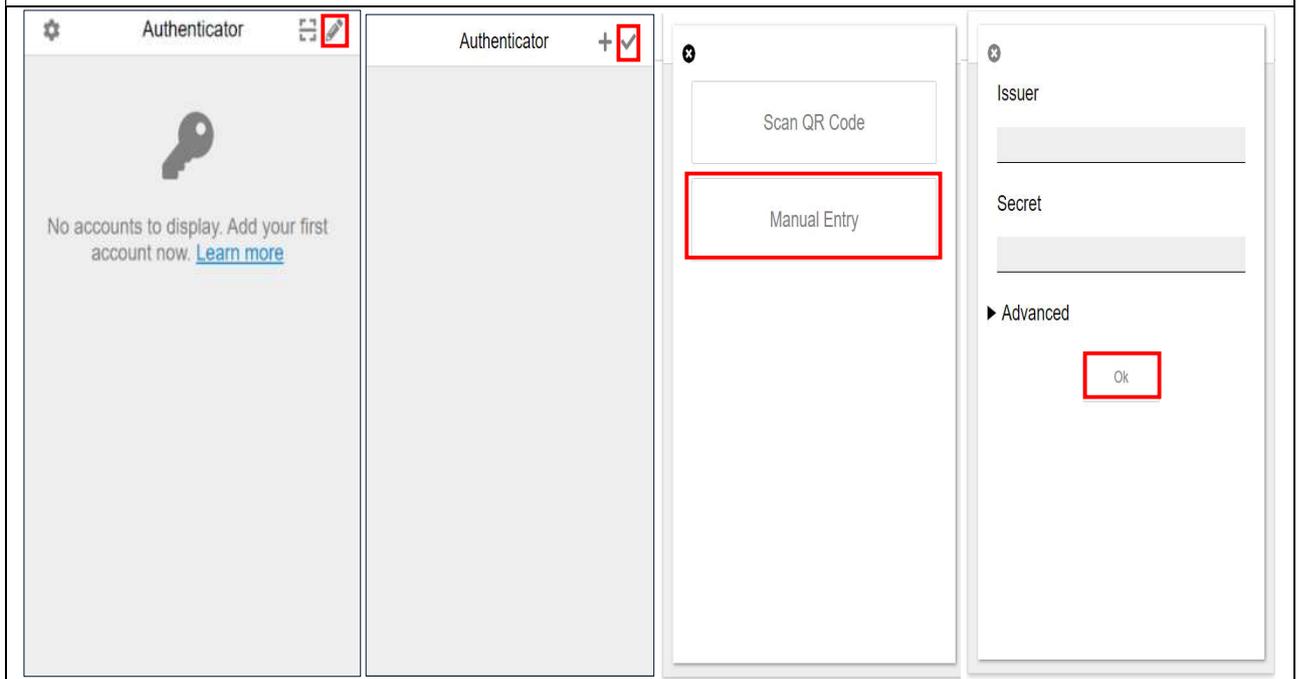
**3.2.11** QR Code Setup.

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.



### 3.2.12 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



**3.2.13 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.

The image shows a web-based setup screen for Two Factor Authentication. At the top, there is a lock icon and the title "Two Factor Authentication" with the instruction "Follow the steps below to enable two factor authentication." Below this is a progress bar with three steps: "DOWNLOAD" (marked with a checkmark), "SETUP" (marked with a "2"), and "VERIFY" (marked with a "3").

The main section is titled "2. Setup" and contains the text: "To setup, open the two factor authenticator app and scan the QR code or enter the following key into your two factor authenticator app." Below this text is a highlighted key: `tppa ng46 7d4q paax vskx 55qb kbjk vjrn`. A large QR code is displayed below the key. At the bottom of this section are two buttons: "< Previous" and "Proceed →".

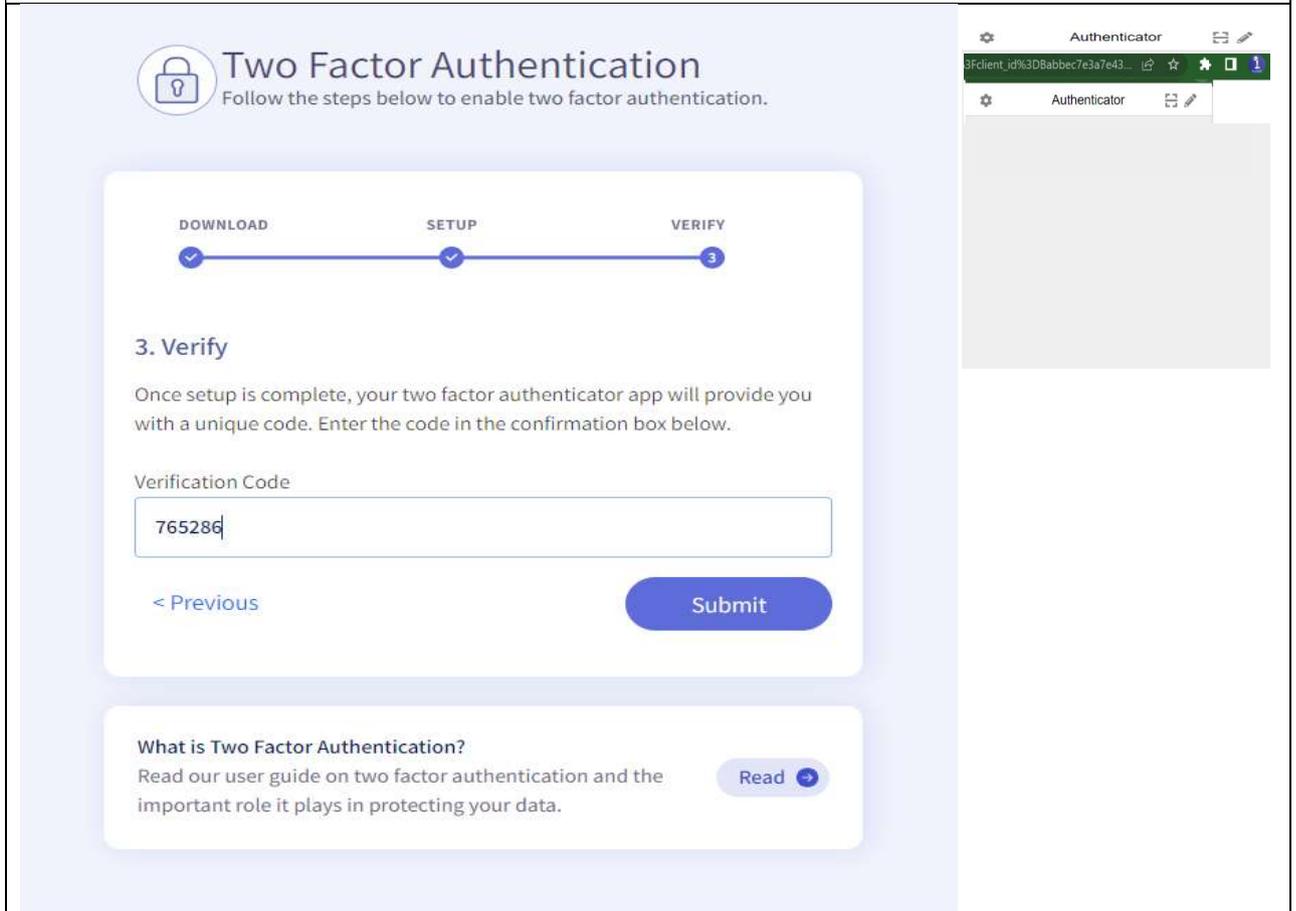
Below the main setup area is a link section titled "What is Two Factor Authentication?" with the text "Read our user guide on two factor authentication and the important role it plays in protecting your data." and a "Read →" button.

On the right side of the image, there is a screenshot of a mobile authenticator app. The app's title bar says "Authenticator". Below the title bar, there is a green header with a long alphanumeric string: "3fclient\_id%3Dbabbc7e3a7e43...". Below this, there is a greyed-out area representing the app's interface.

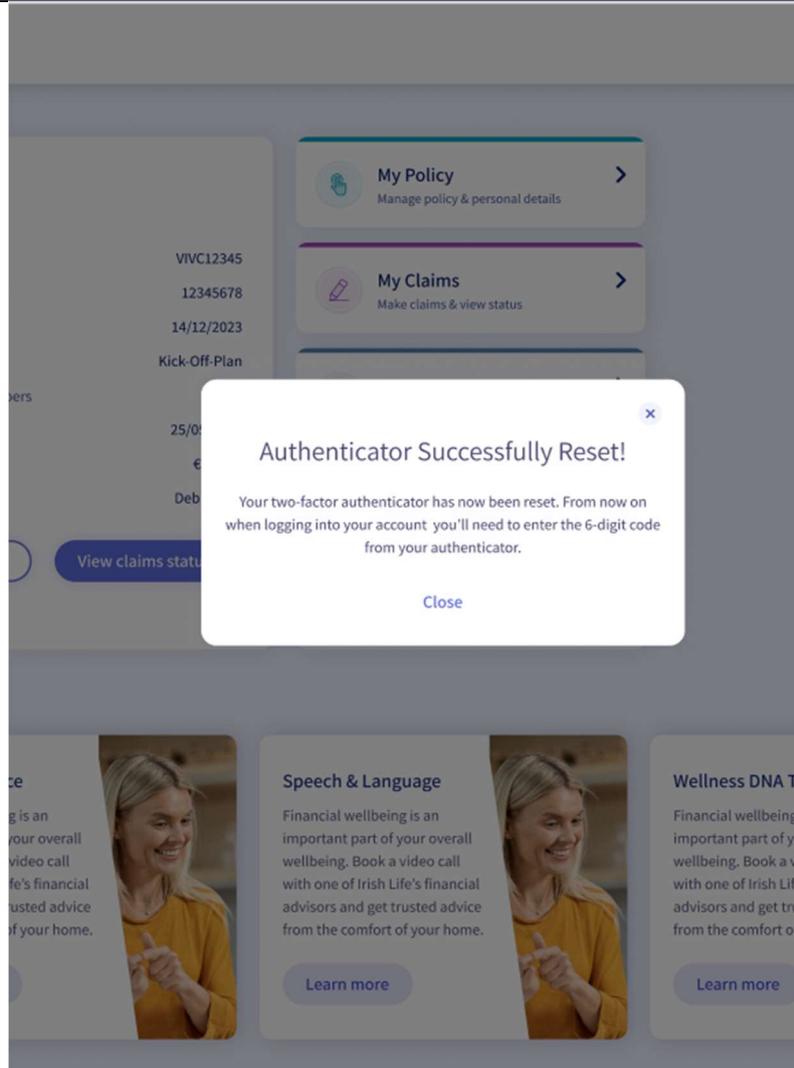
**3.2.14** Enter the 6-digit authentication code into the verification code box on the Verify screen and select “Submit”.

If there is an error:

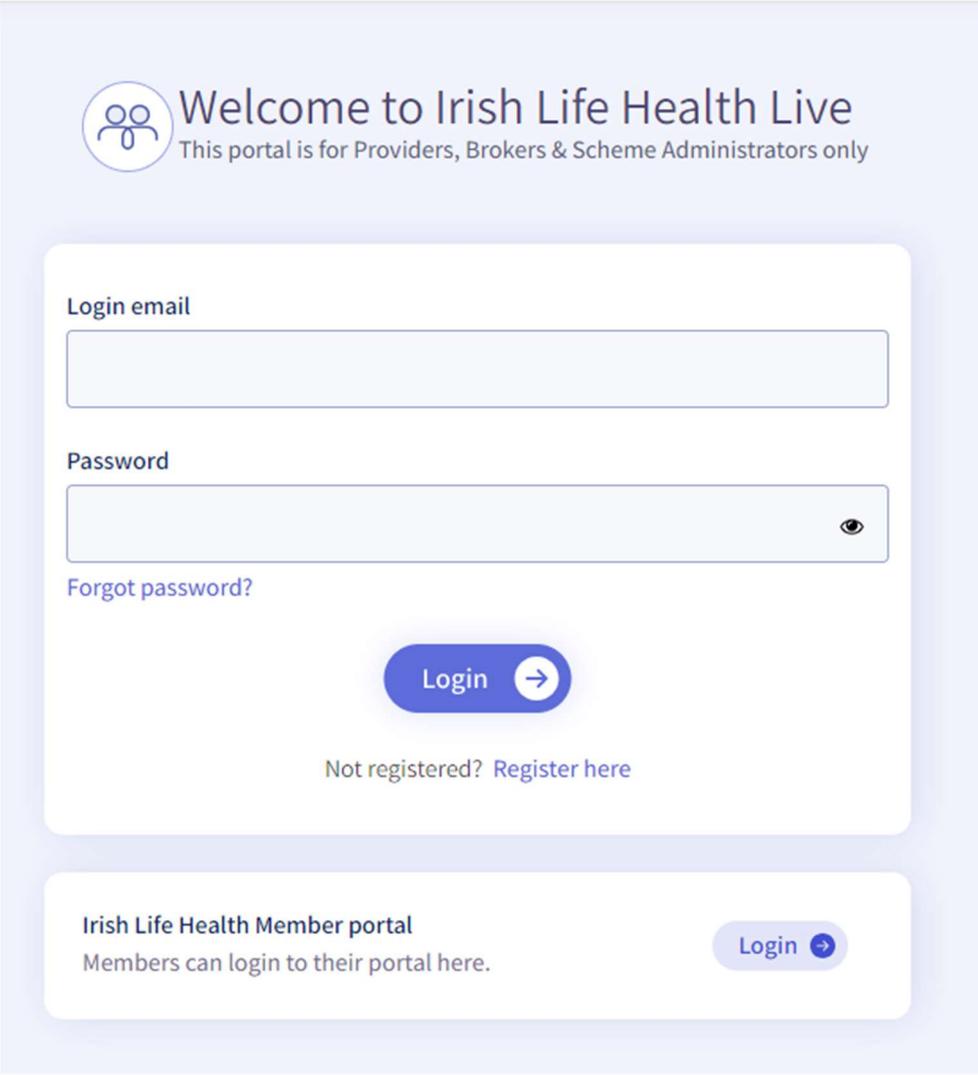
1. Retry, confirming the correct digits are input, which match the code on the authenticator at the time of submission.
2. Go to the previous page and re setup the authenticator.



**3.2.15 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.

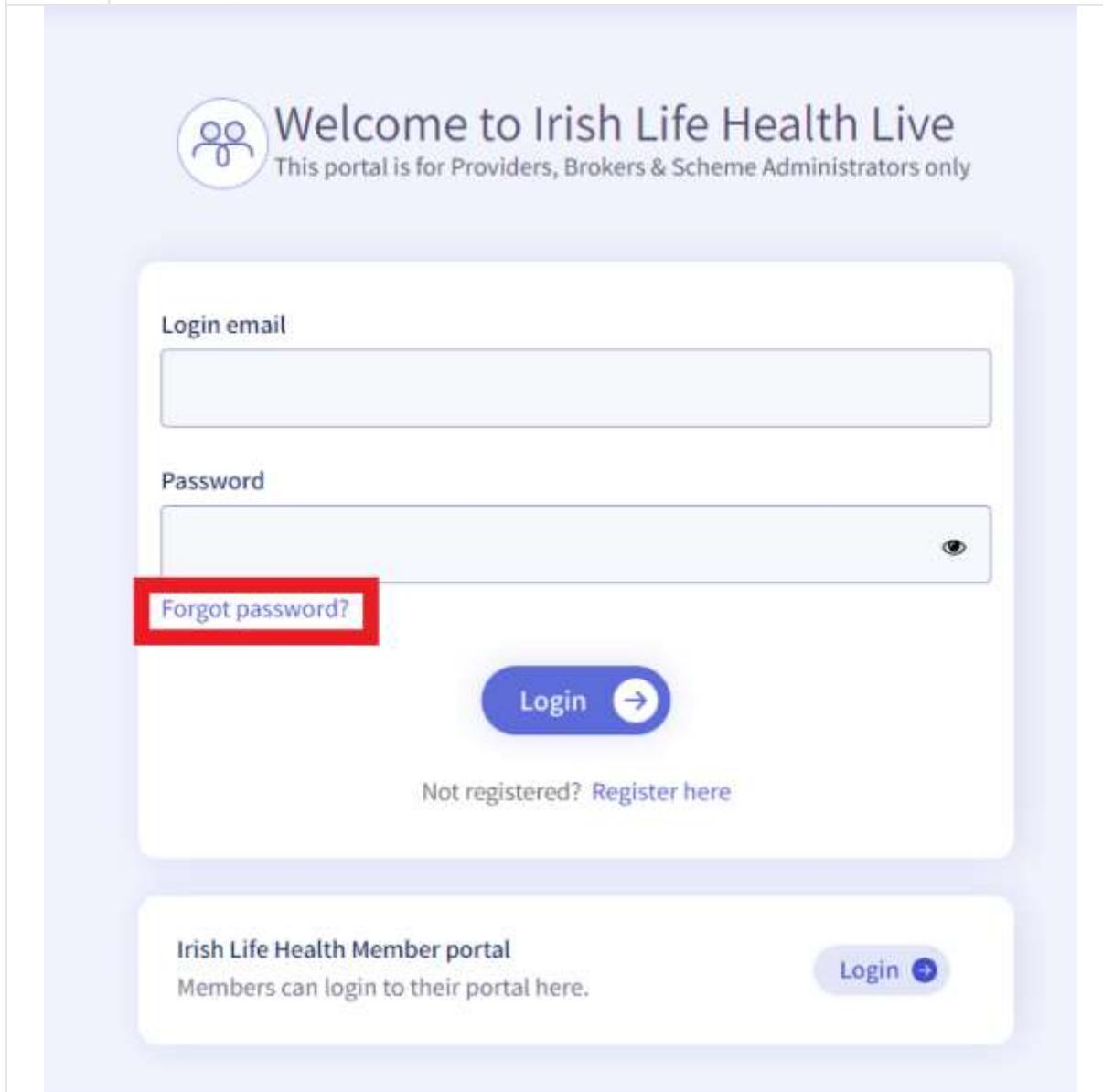


## 4 Logging in to Irish Life Health Live

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

## 5 Resetting your Password

<b>Note</b>	Enter the Irish Life Health Live address into your addresss bar and press Enter.
<b>1</b>	Click on the Login tab.
<b>2</b>	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
- 4 click Reset my 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](#)

- 5 Check your inbox for the password reset email and click Reset your 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](mailto: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](mailto:heretohelp@irishlifehealth.ie) or call us on 01 562 5100.

Yours sincerely,

Irish Life Health

- |   |   |
|---|---|
| 5 | Create a new password.<br>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](#)

## 7 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 corporate enquiries teams.
3	Links to each page in the application (Home, Policy Admin, Quote & Purchase, Reporting & My Account).
4	Log Out button.

### 7.1 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. |
|---|--|

## 7.2 Search Policy

Search Policy

1  
 Policy Number

2  
 Member Number

3  
 Last Name and Date of Birth

4  
 Staff Number

---

Policy Number

Member Number

Last Name and Date of Birth

Staff Number

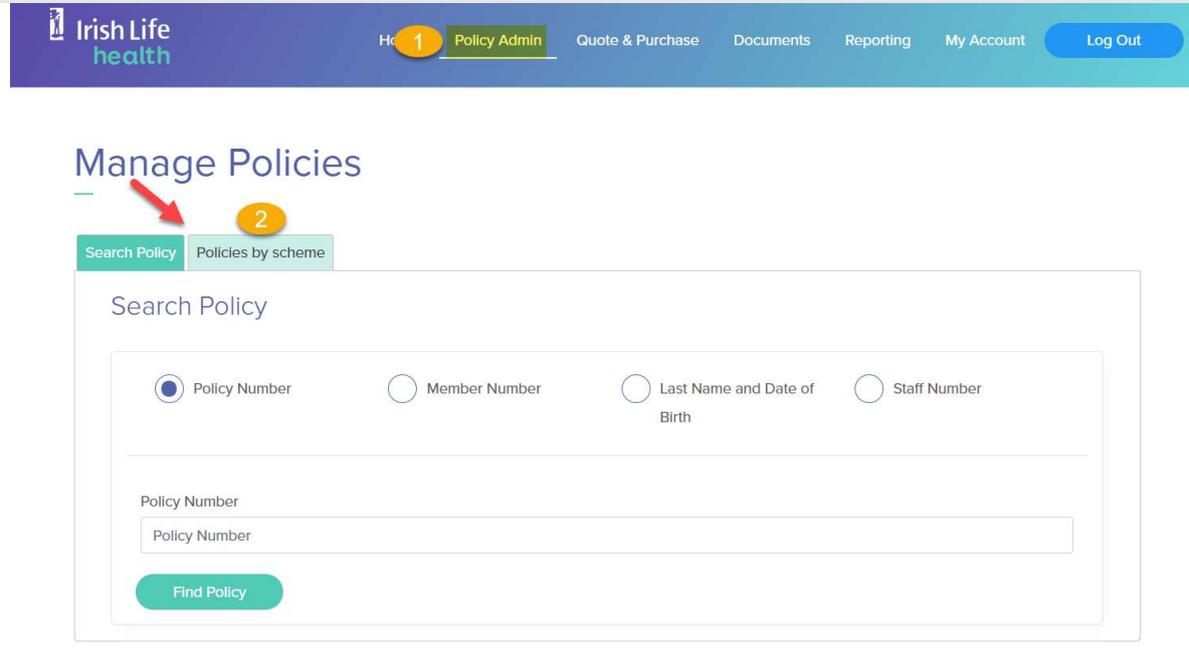
5 Find Policy

<b>1</b>	Enter a full (not a partial) policy number to search for a policy by policy number.
<b>2</b>	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.
<b>3</b>	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.
<b>4</b>	Click the Staff Number radio button to open and enter a Staff Number.
<b>5</b>	Click the Find Policy button to search by the criteria you have entered.
<b>TIP</b>	<a href="#">You can also search for all policies on a scheme on the Policy Admin page.</a>

## 8 Policy Admin

### 8.1 Manage Policies

#### 8.1.1 Search Policy



<b>1</b>	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: <ul style="list-style-type: none"><li>○ Search Policy, and</li><li>○ Policies by Scheme</li></ul> The Search Policy tab is a duplication of the search policy functionality on the Welcome/Home page.
<b>2</b>	Click the Policies by Scheme tab to view lists of policies by scheme.

## 8.1.2 Policies by Scheme

- 1 Click in the Select a Scheme field 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 to view a full list of policies. Notice that there are 3 tabs for the results: Live, Quotes and Cancelled.

### Manage Policies

- 3 On the Live tab, notice that if the list of members is multiple pages long, you would be able to navigate between pages in the list.
- 4 Type search criteria in the Search Within Results box to refine your search.
- 5 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
<a href="#">[Link]</a>	Zsht Ljqyngme	01/11/1972	Be Fit 3	€3612.10	30/12/2021
<a href="#">[Link]</a>	Hjpy Kkasyca	01/11/1967	Be Fit 3	€4105.20	30/12/2021
<a href="#">[Link]</a>	Ojbnlues Knpemg	01/01/1984	Be Fit 3	€1559.50	30/12/2021
<a href="#">[Link]</a>	Akux Onktjm	01/03/1979	Be Fit 3	€4598.30	30/12/2021
<a href="#">[Link]</a>	Svjysuo Sjbs	01/09/1976	Be Fit 3	€4105.20	30/12/2021
<a href="#">[Link]</a>	Osr Ajkwk	01/09/1971	Be Fit 3	€4391.70	30/12/2021
<a href="#">[Link]</a>	Vnbp acqynva	01/03/1976	Be Fit 3	€4598.30	30/12/2021
<a href="#">[Link]</a>	Fcbdmvzvd U' Pjjqkbx Ldioypyd	01/10/1966	Be Fit 3	€3119.00	30/12/2021
<a href="#">[Link]</a>	Rhjyxb Kjufrnm	01/09/1973	Be Fit 3	€1559.50	30/12/2021
<a href="#">[Link]</a>	Knzkc Asfnxbe	01/02/1978	Be Fit 3	€4105.20	30/12/2021

**6** On the Quotes tab, any quotations for the scheme would display.



**7** On the Cancelled tab, any cancelled policies for the scheme would display.

**8** Click the Policy hyperlink to open a cancelled policy.



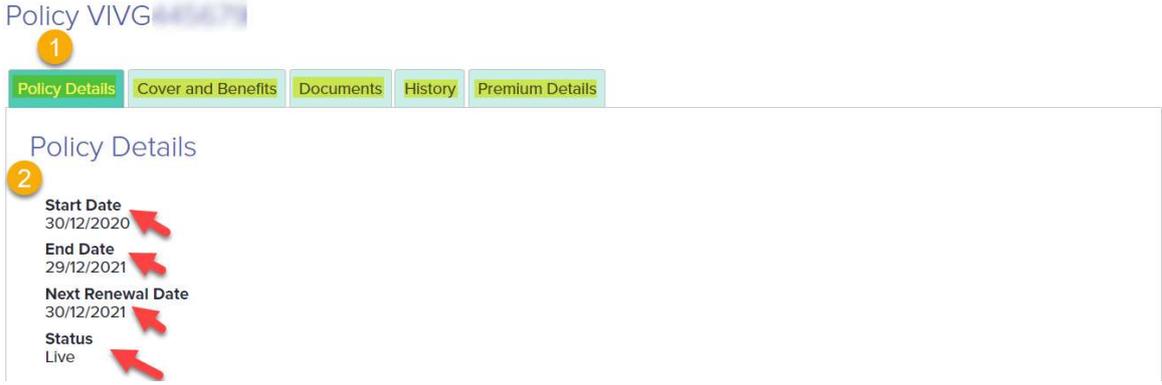
### 8.2 Individual Policy Details

**1** When you click on an individual policy, the policy details for that policy displays with 5 tabs:

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

**2** Under Policy Details you will be able to view the:

- Start Date
- End Date
- Next Renewal Date
- Status



**Note** If a policy is due for renewal, an additional renewal tab show all renewal information:



## Renew this policy

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

### Renewal Quota Details

#### Policy Details

Quote Number:
Start Date: 27/06/2020
End Date: 26/06/2021
Gross Premium Group: €2,412.40
Gross Premium Member: €0.00
Average Monthly Payment: €0.00

#### Policy Holder Details

Name: Cigw Zsrwkt
Email: test.emaill@irishlifehealth.io
Home Phone:
Work
Mobile Phone:
Address 1: Irishlifehealth,
Address 2: Irish Life Centre
Address 3: Lower Abbey Street
County: Co Meath

#### Insured Member(s)

Title	Name	Plan	Packages	DOB	Realtionship	Total Premium	Government Levy	Total
Miss	Azrv Zsrwkt	BeneFit		01/04/2000	Dependant	€582.40	€449.00	€482.40
Mrs	Wsihu Rdvlg Ohadnu	BeneFit		01/04/1961	Partner	€1,165.00	€449.00	€965.00
Mr	Cigw Zsrwkt	BeneFit		01/02/1958	Policyholder	€1,165.00	€449.00	€965.00

#### Premium Breakdown

Name	Premium	Risk Equalisation Premium Credit	Levy	Gross Premium	Group Discount	LCR Loading	Net Premium	Your Tax Relief	Amount You Pay
Azrv	€582.40	€0.00	€449.00	€582.41	€0.00	€0.00	€582.40	€100.00	€482.40

3

The next section under Policy Details shows the Members on the policy. Here you can see policy details per member on each tab, add members, change cover for each member and update the member's last name.

**Members** + Add a member

**Zsht Ljqyngme (Policyholder)** **Hncwa Ljqyngme (Dependant)** **Cjbvdb Vkbnp (Partner)**

**Plan**  
Be Fit 3

**Member Number**  
[Redacted]

**Date of Birth**  
01/11/1972

**Join Date**  
30/12/2020

**First Insured**  
30/12/2016

**Name**  
Zsht Ljqyngme

**Scheme Name**  
Irish Life Health Staff Scheme

**Staff Number**  
[Redacted]

Last Name

Ljqyngme

**Update Last Name**

**Actions**

**Change Cover**

The policyholder cannot be removed.

4

The next section shows you the Addresses (Postal and Billing) for the Policy. Here you can Update the policy postal or billing addresses on each of the tabs.

**Addresses on the policy** 4

**Postal Address** **Billing Address**

Address Line 1  
Irishlifehealth,

Address Line 2  
Irish Life Centre

Address Line 3  
Lower Abbey Street

Town / City  
Dublin 1

County  
DUBLIN 5

**Update Postal Address**

**5** The last section shows you the Other Policy Details:

- Contact Details
- Contact Preferences
- Bank DD details for Split Billing members

Below the other policy details section is the Cancel this policy button.

Other Policy Details **5**

Contact Details | Contact Preferences | Bank DD

Email  
test1.email@irishlifehealth.ie

Mobile Phone  
7373864693

Home Phone

Work Phone

Save

Cancel this policy

**6** The Contact Preferences tab shows the current contact method selected on the policy:

Contact Details | Contact Preferences | Bank DD

Electronic  Post

Update

**7** If a member is paying a portion of their policy by Split Billing, the Bank DD tab appears on their policy and shows the current banking details and direct debit collection date:

Changing member's bank account number may impact their direct debit payment.

Account Holder Name

IBAN

Direct Debit Collection Date

This account may accept direct debits?

My client has confirmed that they are the only person required to authorise direct debits from this account. Should this account require a second signature to authorise direct debits please complete and return this [Direct Debit Form](#).

My client has read the [Terms of Business](#).

Creditor Identifier No:   
Creditor Address: Irish Life Health Ireland dac, P.O. Box 764, Cork.

## 8.2.1 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"> <li>○ Name and surname</li> <li>○ (Type) e.g. Policyholder or Partner or Spouse or Dependant etc.</li> </ul>
2	<p>Click the Add Member button under the Members heading to add a new member.</p>

Policy **XXXXXXXXXX**

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

**Policy Details**

**Start Date**  
30/12/2020

**End Date**  
29/12/2021

**Next Renewal Date**  
30/12/2021

**Status**  
Live

**Members** + Add a member **2**

**Zsht Ljqyngme (Policyholder)** | **Hncwa Ljqyngme (Dependant)** | **Cjbvdb Vkbnp (Partner)** **1**

**Plan**  
Be Fit 3

**Member Number**  
[Redacted]

**Date of Birth**  
01/11/1972

**Join Date**  
30/12/2020

**First Insured**  
30/12/2016

**Name**  
Zsht Ljqyngme

**Scheme Name**  
Irish

**Staff Number**  
[Redacted]

**Last Name**

Ljqyngme

**Update Last Name**

**Actions**

**Change Cover**

The policyholder cannot be removed.

3

The Add Dependant screen opens.

**Note**

A red asterisk (\*) indicates mandatory fields.  
Complete the fields for the member.

Add Dependant

3

×

### Dependant

×

Effective Date\*

21/02/2021

Plan\*

Select a Plan

Title\*

Select title

First Name\*

Surname\*

Date of Birth\*

DD/MM/YYYY

Spouse/Partner\*

Yes  No

4	If the new member has current or previous health insurance and you select Yes to this question, the current or previous health insurance details are required too.
5	If the new member is younger than 35, you can click Next to continue to the next step in adding a new member to the policy.

### Previous Health Insurance

Does this dependant have current or previous health insurance?\*

Yes **4**
 No

Current or previous health insurer\*

Please select ▼

Current or previous plan\*

Select a plan ▼

Last renewal date\*

21/02/2021

This is the start date of the last policy the member had.

+ Add Another Person

**5**

Cancel **Next**

**Notes**

- If the member is over 35 years in age, the Lifetime Community Rating (LCR) questions will become mandatory to calculate any LCR penalty that might apply.
- Different sub-questions will appear depending on the answers given to each question according to the regulations for Lifetime Community Rating.
- If a member does not currently hold private health insurance, they may be subject to waiting periods.
- A link to the Irish Life Health waiting periods is available by clicking the Find out more about waiting periods hyperlink.

### Lifetime Community Rating

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

### 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

Cancel

Next

6

### Add Dependant

×

Effective Date: 21/02/2021 (New Member)

Total Chargeable: € 80.50

Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge
New Member	Partner	N/A	€0	Be Fit 1	1423.20	€80.50
					<b>Total Premium:</b>	<b>€1423.20</b>
					<b>Total Chargeable:</b>	<b>€80.50</b>

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

6

7	Select the payment option: Direct Debit or Credit Card.
8	If Direct Debit, capture the banking details.
9	Confirm that the account accepts debits and the payee is authorised to set up this direct debit to the account.

**Add Dependant** ×

---

**Effective Date:** 21/02/2021 (New Member)

**Total Chargeable:** € 80.50

Payment options

7  Direct Debit     Credit Card

**Direct Debit**

8 **Account Holder\***

**IBAN\***

**Collection Day\***

Please Select
▼

9 **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.\*

**Note**

If the member is paying by Credit Card, select this as the Payment Option and capture the card details.  
Again the confirmation tick box is required to confirm authorisation to debit the card for the total chargeable amount.

Add Dependant ×

**Effective Date:** 21/02/2021 (New Member)

**Total Chargeable:** € 80.50

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 €80.50

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

**10-12** Tick to confirm that each of the waiting periods have been explained to the member.

**13** Click Confirm to add the new member to the policy.

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

**10**  **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.

**11**  **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

**12**  **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.

**13**

14

A Confirmation message confirms the policy has been successfully updated. Click the Close button to view the updated policy.

Add Dependant ×

---

**Effective Date:** 30/03/2021 (djfnhaks kadjfka)  
**Total Chargeable:** € 619.00

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

---

Back Close

14

### 8.2.1.1 Delete a Member

<b>Note</b>	You cannot delete the policyholder from a policy. If you do this, you will in effect, be cancelling the policy. If this is what you would like to do, scroll down to the bottom of the Policy Admin page and click the Cancel This Policy button. To delete another member type from the policy, on the Policy Admin page, scroll down to Members and:
<b>1</b>	Click the tab for the member you would like to delete.
<b>2</b>	Click the Delete this member button.

Irish Life health

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

Policy **XXXXXXXXXX**

Policy Details Cover and Benefits Documents History Premium Details

**Policy Details**

**Start Date**  
30/12/2020

**End Date**

**Next Renewal Date**  
30/12/2021

**Status**  
Live

**Members** + Add a member

1

Zsht Ljqyngme (Policyholder) **Hncwa Ljqyngme (Dependant)** Cjbvdb Vkbnp (Partner)

**Plan**  
Be Fit 3

**Member Number**  
XXXXXXXXXX

**Date of Birth**  
01/04/2015

**Join Date**  
30/12/2020

**First Insured**  
30/12/2016

**Name**  
Hncwa Ljqyngme

**Scheme Name**  
Irish Life Health Staff Scheme

Last Name

Ljqyngme

Update Last Name

**Actions**

Change Cover

2 Delete this member

3-4

Enter an Effective Date and click the Next button.

Delete this member - Hncwa Ljqyngme

x

Effective Date

21/02/2021

3

Delete this member from the policy?

Hncwa Ljqyngme ( )

4

Close

Next

5

View the reduction in premium.  
Click Next.

Delete this member - Hncwa Ljqyngme

x

Effective Date: 21/02/2021 (Hncwa Ljqyngme)

Total Chargeable: € 0.00

Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge
Hncwa Ljqyngme	Dependant	Be Fit 3	€493.10	Be Fit 3	-421.50	€0.00

Total Premium: €-421.50

Total Chargeable: €0.00

5

Cancel

Next

6-8	Confirm and tick the impact the cancellation will have on each type of waiting period.
9	Click the Confirm button to delete the member.

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

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

### 1. Upgrade Waiting Periods 6

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 7

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 8

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.

9

[Back](#) [Close](#) [Confirm](#)

10

A Confirmation message will appear confirming the policy has been successfully updated and the reduction applicable to the remaining direct debits (where applicable).  
Click Close to view the updated policy.

Delete this member - djfnhaks kadjfka ×

**Effective Date:** 30/03/2021 (djfnhaks kadjfka)

**Total Chargeable:** € -619.00

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

We will reduce the remaining direct debits the amount of €-619.00 for the remainder of the policy year.

10

Back

Close

## 8.2.2 Changing cover

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

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

8-9

View the impact on the premium and click Next.

Change Cover - Hncwa Ljqyngme 8 ×

Effective Date: 21/02/2021 (Hncwa Ljqyngme)

Total Chargeable: € 0.00

Name	Role	Current Plan	Current Premium	New Plan	New Premium	Charge
Hncwa Ljqyngme	Dependant	Be Fit 3	€493.10	4D Health 1	-171.30	€0.00

Total Premium: €-171.30

Total Chargeable: €0.00 9

Cancel Next

9-10

If applicable, the payment screen will appear.  
Enter the card details and tick the I agree statement to process the card details.

Change Cover ×

Effective Date: 20/05/2020

Total Chargeable: € 112.90

Credit Card 9

Card Holder Name\*

Card Number\*

Expiry Month\*

Expiry Year\*

CVV\*

I agree to have the full balance charged to my credit/debit card.\* 10

11-14

Confirm and tick the impact the cancellation will have on each type of waiting period.  
Click the confirm button to change cover.

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

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

1. Upgrade Waiting Periods 11

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 12

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 13

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.

14

[Back](#) [Close](#) [Confirm](#)

15

A Confirmation message including details of any reduction in the balance owing for the policy – where applicable – displays. Click Close to view the updated policy.

Change Cover - Kyjely Xchto

x

**Effective Date:** 30/03/2021 (Kyjely Xchto)

**Total Chargeable:** € -549.60

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

We will reduce the remaining direct debits the amount of €-549.60 for the remainder of the policy year.

15

Back

Close

### 8.2.3 Update Member Surname

<b>1</b>	Click the tab for the member you would like to update.
<b>2</b>	Select and overwrite the existing name in the Update Last Name text box.
<b>3</b>	Click the Update Last Name button.

Members + Add a member

Zsht Ljqyngme  
(Policyholder)

Hncwa Ljqyngme  
(Dependant) 1

Cjbvdb Vkbnp  
(Partner)

**Plan**  
Be Fit 3

**Member Number**  
[REDACTED]

**Date of Birth**  
01/04/2015

**Join Date**  
30/12/2020

**First Insured**  
30/12/2016

**Name**  
Hncwa Liavname

Irish Life Health Staff Scheme

Last Name

2

Update Last Name 3

**Actions**

Change Cover

Delete this member

<b>4</b>	A message confirming the change will display.
----------	---

Xirdod

Update Last Name

Policy update with success. 4

## 8.2.4 Update Postal or Billing Address

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

### Addresses on the policy

Postal Address Billing Address

Address Line 1

Address Line 2

Address Line 3

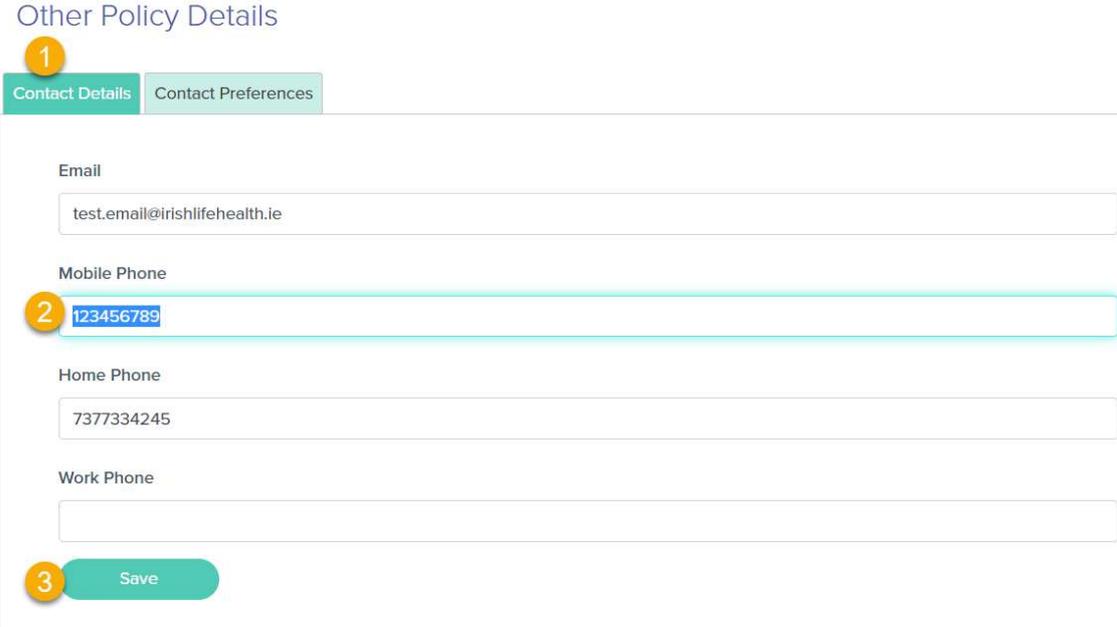
Town / City

County

<b>4</b>	A message confirming the change will display.
----------	---

Policy update with success

## 8.2.5 Update Contact Details

<b>Note</b>	Select the relevant member tab.
<b>1</b>	Under Other Policy Details, click the Contact Details tab.
<b>2</b>	Overwrite the existing information or enter information in the relevant field.
<b>3</b>	Click the Save button.
 <p>The screenshot shows the 'Other Policy Details' section with two tabs: 'Contact Details' (selected) and 'Contact Preferences'. Below the tabs are four input fields: 'Email' (test.email@irishlifehealth.ie), 'Mobile Phone' (123456789), 'Home Phone' (7377334245), and 'Work Phone' (empty). A green 'Save' button is at the bottom. Red callout boxes with numbers 1, 2, and 3 point to the 'Contact Details' tab, the 'Mobile Phone' field, and the 'Save' button respectively.</p>	
<b>4</b>	A message confirming the change will display.
 <p>The screenshot shows a green confirmation message: 'Policy update with success'.</p>	

## 8.2.6 Update Contact Preferences

<b>Note</b>	Select the relevant member tab.
<b>1</b>	Under Other Policy Details, click the Contact Preferences tab.
<b>2</b>	Select the radio button for Electronic or Post as per the member's preference.
<b>3</b>	Click the Update button.
 <p>Other Policy Details</p> <p>Contact Details <b>1</b> Contact Preferences</p> <p><input checked="" type="radio"/> Electronic <b>2</b> <input type="radio"/> Post</p> <p>Update <b>3</b></p>	
<b>4</b>	A message confirming the change will display.
 <p>Policy update with success <b>4</b></p>	

## 8.2.7 Update Split Bank Direct Debit details (where applicable)

1	Under Other Policy Details, click the Bank DD tab.
2	Change the details required. For example, if the policyholder would like to change the collection date, update this field. Note that a value between 1 and 28 should be selected for the collection date field.
3	Or, for example, if you are changing the bank account details that the direct debit is collected from including the Account Holder name and IBAN fields.
4	Any changes on this screen require you to confirm that the account accepts direct debits and that the client has read the Terms of Business (see the hyperlink to these on our website).
5	Click the Update button.

Other Policy Details

Contact Details Contact Preferences **Bank DD** 1

Changing member's bank account number may impact their direct debit payment.

Account Holder Name

3 IBAN

Direct Debit Collection Date

2 28

This account may accept direct debits?  
My client has confirmed that they are the only person required to authorise direct debits from this account.  
Should this account require a second signature to authorise direct debits please complete and return this [Direct Debit Form](#).

4  My client has read the [Terms of Business](#).

Creditor Identifier No: IE67SDD303988  
Creditor Address: Irish Life Health Ireland dac, P.O. Box 764, Cork.

5 Update

## 8.2.8 Cancel a Policy

Note	
1	Select the relevant policy.
2	Under Other Policy Details, click the Cancel this Policy button.
3	Enter the Effective Date and click the Next button.
3	Review the cancellation and click the Next button.

Other Policy Details

Contact Details | Contact Preferences | Bank DD

Email

Mobile Phone

Home Phone

Work Phone

Save

Cancel this policy <sup>1</sup>

---

Cancel this policy ×

Effective Date  
 <sup>2</sup>

Cancel this policy?  
 This policy is about to be cancelled. Please click the confirm button if you are happy with the cancellation"

<sup>3</sup>

**4-6** Review the messages and confirm all waiting periods impacted as a result of cancelling the policy by ticking each of the boxes for each waiting period type.

**7** Click the Confirm button.

**1. Upgrade Waiting Periods** 4

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** 5

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** 6

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.

7

## 8.2.9 Viewing Cover on a Policy

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

The screenshot displays the Irish Life Health Live user interface. At the top, the navigation bar includes 'Home', 'Policy Admin' (highlighted with a red arrow), 'Quote & Purchase', 'Documents', 'Reporting', 'My Account', and 'Log Out'. Below the navigation bar, the 'Policy Admin' section is active, showing tabs for 'Policy Details', 'Cover and Benefits' (highlighted with a '1' callout), 'Documents', 'History', and 'Premium Details'. The main content area is titled 'Cover Details for' and includes a section 'Who is covered?' with the instruction 'Select a member to view their benefits and Terms & Conditions.' A list of members is shown, with the first member, 'Kyjely Xchto (Policyholder)', highlighted with a red arrow and a '2' callout. Below the member list, there is a section for 'Terms & Conditions/ Policy Documents' with a sub-section 'A complete overview of policy Terms & Conditions.' and two links: 'View member Membership Handbook' and 'View Data Privacy Notice', with a '3' callout pointing to them.

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

First 2 visits fully covered 50% cover for subsequent visits.



#### MRI Scans

MRI Scan: approved centre. Fully covered.



#### CT Scans

CT Scan: approved centre. Fully covered.



#### GP Visits

First 2 visits fully covered 50% cover for subsequent visits.



#### Dental

€250.  
Up to €40 x 7 visits.



#### Physiotherapist

€40 x 9 visits.



#### Optical

50% up to €150 per policy year.



#### Nutrition

Unfortunately this benefit is not covered.



#### Massage

€40 x 7 combined.

5

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

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

### Member's hospital cover

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 €75 excess per claim; 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: Covered subject to €75 excess per claim
- ✔ Listed Special Procedures: Covered subject to €75 excess per claim subject to €2,000 co-payment on certain orthopaedic procedures
- ✔ Private Room: Covered (Beacon only) subject to €75 excess per claim. Mater Private and Blackrock Clinic 50% cover subject to €75 excess per claim. All subject to €2,000 co-payment on certain orthopaedic procedures.
- ✔ Semi Private Room: Covered (Beacon only) subject to €75 excess per claim. Mater Private and Blackrock Clinic 50% cover subject to €75 excess per claim. All subject to €2,000 co-payment on certain orthopaedic procedures.

5

> View member's hospital list

Lists of Medical Facilities: as of 1 April 2020

A. Hospitals	Hospital type	Direct Settlement	List A
<b>Cavan</b>			
Cavan General Hospital Public	Public	Yes	Covered
<b>Clare</b>			
Mid Western Regional Hospital, Ennis	Public	Yes	Covered
<b>Cork</b>			
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

8



8

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

## 8.2.10 Viewing Policy Documents

### 8.2.10.1 Viewing Documents for the Current Policy Year

<b>Note</b>	This page is under the Policy Admin section and appears once you have searched for and clicked on a specific policy.
<b>1</b>	Click the Documents tab.
<b>2</b>	This has two sub-tabs: <ul style="list-style-type: none"><li>• Current Year's Documents</li><li>• All Years' Documents</li></ul>
<b>3</b>	Click the Current Year's Documents tab to see the documents relating to the most recent policy. <b>Note:</b> You will see some policy documents but not any documents relating to claims.
<b>4</b>	Click the View button next to the document you want to open.

The screenshot shows the 'Policy Documents' page. At the top, there are tabs for 'Policy Details', 'Cover and Benefits', 'Documents', 'History', and 'Premium Details'. The 'Documents' tab is selected. Below it, there are sub-tabs for 'Current Year's Documents' and 'All Years' Documents'. The 'Current Year's Documents' sub-tab is selected. The main content area shows a table with columns 'Date Created', 'Document Name', and 'View'. There are three rows of data. The 'View' button for the first row is highlighted with a callout '4'. There are also callouts '1', '2', and '3' pointing to the 'Documents' tab, the sub-tabs, and the 'Current Year's Documents' sub-tab respectively. The table shows the following data:

Date Created	Document Name	View
2019-11-30	Your Renewal	<a href="#">View</a>
2019-12-26	Your Renewal Confirmation	<a href="#">View</a>
2019-12-26	Travel Insurance Policy	<a href="#">View</a>

Showing 1 to 3 of 3 entries

Previous 1 Next

### 8.2.10.2 Viewing Document for Previous Policy Year/s

<b>1</b>	Click the All Years Documents tab to open policy documents from previous years.
<b>2</b>	Click the Select a Policy Year drop-down list to choose the relevant policy year.
<b>3</b>	Click the Get Documents button.
<b>4</b>	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' (highlighted), 'History', and 'Premium Details'. Below the tabs, the 'Policy Documents' title is displayed. There are two sub-tabs: 'Current Policy Year' and 'All Policy Years' (highlighted with callout 1). A dropdown menu labeled 'Select a policy year to retrieve documents' is set to '30/12/2019 to 29/12/2020' (callout 2). Below the dropdown is a 'Get Documents' button (callout 3). Underneath is a 'Show 10 entries' control and a search box. A table lists documents with columns for 'Date Created', 'Document Name', and 'View'. The first row shows a document created on 2019-11-27 titled 'Your Renewal' with a 'View' button (callout 4). Other rows include 'Your Renewal Confirmation', 'Direct Debit Schedule', and three 'Your Refund' documents from 2020. At the bottom, it says 'Showing 1 to 6 of 6 entries' and has 'Previous', '1', and 'Next' navigation options.

## 8.2.11 Viewing Policy History

Click History tab to open policy history.

Policy [REDACTED]

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

## 8.2.12 Viewing Policy Premium Details

Click the Premium tab to open policy details.

Policy **123456789**

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

### Premium Breakdown

**Policy Premium Details**

**Policy start date**  
30/12/2020

**Refused date**  
30/12/2021

**Scheme Name**  
Irish Life Health Integration scheme

**Member pays**  
€1559.50

**Payment method**  
DirectDebit

**Payments frequency**  
Monthly

**Policy Premium Breakdown**

**Premium**  
€1505.96

**Plus Government Levy**  
+ €449.00

**Equals TOTAL PREMIUM**  
€1954.96

**Less Group Discount**  
- €195.50

**Equals GROSS PREMIUM**  
€1759.46

**Less Tax Relief**  
- €200.00

**Equals ANNUAL NET PREMIUM**  
€1559.50

**Premium for Members**

Member Name	Member Number	Member Type	The Plan	€ Cost of Cover	€ Discounts
Kyjely Xchto	2660065	Policyholder	Be Fit 3	€1559.50	€195.50

**Member's Payment Schedule**

Due Date	€ Amount	€ Amount Paid	€ Amount To Pay
30/11/2021	€129.96	€0.00	€129.96
30/10/2021	€129.96	€0.00	€129.96
30/09/2021	€129.96	€0.00	€129.96
30/08/2021	€129.96	€0.00	€129.96
30/07/2021	€129.96	€0.00	€129.96
30/06/2021	€129.96	€0.00	€129.96
30/05/2021	€129.96	€0.00	€129.96
30/04/2021	€129.96	€0.00	€129.96
30/03/2021	€129.96	€0.00	€129.96
28/02/2021	€129.96	€0.00	€129.96
30/01/2021	€129.96	€0.00	€129.96
30/12/2020	€129.94	€0.00	€129.94

## 9 Quote & Purchase

### 9.1 Create a Quote

1 Click the Quotes & Purchase page from the main menu / toolbar.

2 Click the Add a new member to a scheme 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.

**Add a new member to a scheme**

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

Policy Number	Name	Start Date	€ Annual Premium	Renewal Date
---------------	------	------------	------------------	--------------

3 The Quote is a 4-step process.

4 Click the Select a Scheme drop-down list and choose the relevant scheme.

5 Select a Policy Start Date.

1 2 3 4

Details Quote Payment Confirmation

\* denotes a required field.

#### Scheme

Select a Scheme\*

Irish Life

#### Policy Start Date

Select a Policy Start Date\*

21/02/2021

6

Complete the Policy Start Date and Policy Holder Details. Complete the Previous Insurance Details.

**Note:**

- if the customer does not currently hold private health insurance, you will need to click the link to the waiting periods to advise of these.
- if they do have previous health insurance, you will need to capture these.
- if Lifetime Community Rating applies (for customers over 35), these details will also be required.
- Tick Suppress Quote Documents if you do not want quotation documents to automatically be sent to the customer.

### Policy Holder Details

6

Plan\*

Select a Plan

Title\*

Select title

First Name\*

Surname\*

Date of Birth\*

DD/MM/YYYY

Email\*

Address \*

Line 1

Address (Line 2)\*

Line 2

Address (Line 3)

Line 3

County\*

Select a county/postcode

Contact Number\*

PPSN (Valid PPS numbers must contain uppercase letters)

Staff Number

Cost Centre Number

Document Delivery Method

E-Doc

Suppress Quote Documents

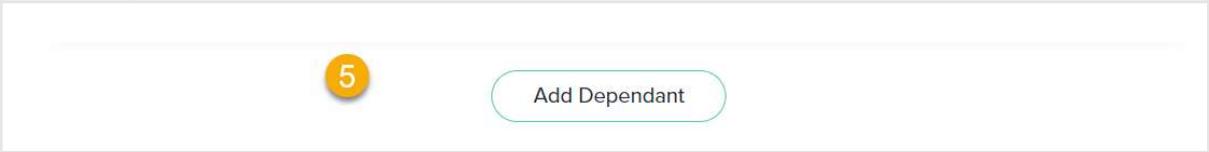
Tick this to Suppress documents

### Previous Health Insurance

Does your client have current or previous health insurance?

Yes  No

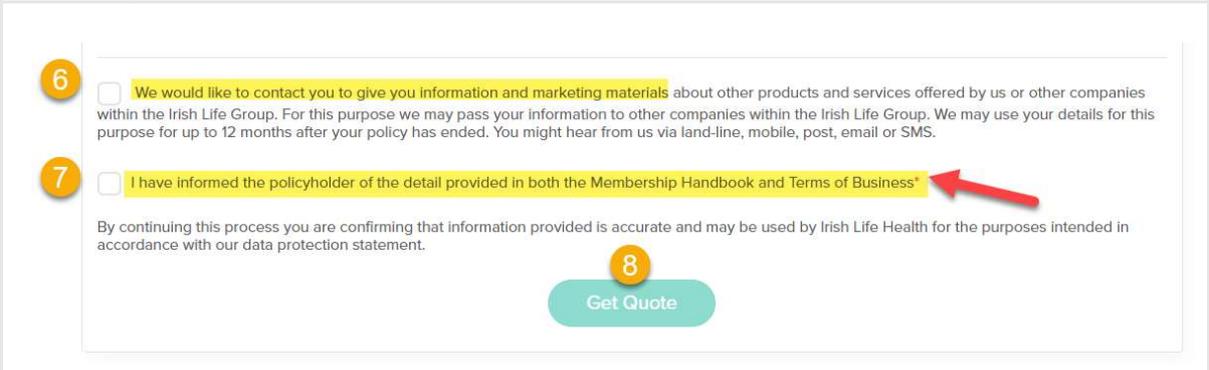
**5** Click the Add Dependant button for each dependant and complete the details – if applicable. Once all dependents have been added you can move to the next step.



**6** Check the marketing consent box – if applicable.

**7** Check to confirm details of Membership Handbook and Terms of Business box (mandatory).

**8** Click the Get Quote button.



9

The quote displays. You are now on Step 2 of the process

**Note:** you can Create A New Quote or Edit The Existing Quote or Purchase the quote.

**Note:** an email or letter with quote details will be sent to the member unless you have ticked SUPPRESS QUOTE DOCUMENTS.

**Policy Details**

- Quote Number: P1659054
- Start Date: 21/02/2021
- End Date: 29/12/2021
- Net Premium Group: €0.00
- Net Premium Member: €887.20
- Average Monthly Payment: €73.93

**Policy Holder Details**

- Name: NEW MEMBER
- Email: [REDACTED]
- Home Phone:
- Work Phone:
- Mobile Phone: [REDACTED]
- Address 1: IRISH LIFE HEALTH
- Address 2: ABBEY STREET
- Address 3:
- County: Co Dublin

**Insured Member(s)**

Title	Name	Plan	Packages	DOB	Relationship	Total Gross Premium	Government Levy	Total Net Premium
Mrs	NEW MEMBER	4D Health 1	Fertility Extra	01/01/1996	Policyholder	€1,058.16	€383.80	€887.20

**Premium Breakdown**

Name	Premium	Risk Equalisation Premium Credit	Levy	Gross Premium (before Group Discount)	Group Discount	LCR Loading	Net Premium	Tax Relief	Total Due
NEW MEMBER	€1,175.73	€0.00	€383.80	€1,175.73	€117.57	€0.00	€1,058.16	€170.96	€887.20

**Buttons:** Create a new quote, Edit this quote, Continue to Payment

10

To purchase the policy, click Continue to Payment

<b>11-12</b>	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.
<b>13-15</b>	Tick the Confirmation buttons required. Click Confirm and Create Policy. The last screen will be your Confirmation Policy screen.

How would your client like to pay for their policy?

Direct Debit 11
 Credit Card

Direct Debit 12

Account Holder\*

IBAN\*

Collection Day\*

Please Select

Amount to be charged is €887.20

I confirm that this account accepts Direct Debits and I am the only person required to authorise Direct Debits from this account.\* 13

I have read and accept the key Terms & Conditions, Terms of Business, Data Privacy Notice, Website Use Policy. 14

15 Confirm and Create Policy

## 9.2 Retrieve a Previously Created Quote

1	Click the Quotes & Purchase page from the main menu / toolbar to view the list of active new business quotes.
<b>Note</b>	Where there are more than one quotes available, you would be able to Search within the quotes for a specific quote.
2	Click the Policy Number hyperlink to open a previously created quote.

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.

Add a new member to a scheme

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

Policy Number	Name	Start Date	€ Annual Premium	Renewal Date
<a href="#">[Redacted]</a>	NEW MEMBER	21/02/2021	€887.20	21/02/2022

**Note**

You will have the option to create a new quote, edit the existing quote or purchase the existing quote. 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.



**Policy Details**

Quote Number:	XXXXXXXXXX
Start Date:	21/02/2021
End Date:	29/12/2021
Net Premium Group:	€0.00
Net Premium Member:	€887.20
Average Monthly Payment:	€73.93

**Policy Holder Details**

Name:	NEW MEMBER
Email:	XXXXXXXXXX@XXXXXX.com
Home Phone:	
Work Phone:	
Mobile Phone:	XXXXXXXXXX
Address 1:	IRISH LIFE HEALTH
Address 2:	ABBEY STREET
Address 3:	
County:	Co Dublin

**Insured Member(s)**

Title	Name	Plan	Packages	DOB	Relationship	Total Gross Premium	Government Levy	Total Net Premium
Mrs	NEW MEMBER	4D Health 1	Fertility Extra	01/01/1996	Policyholder	€1,058.16	€383.80	€887.20

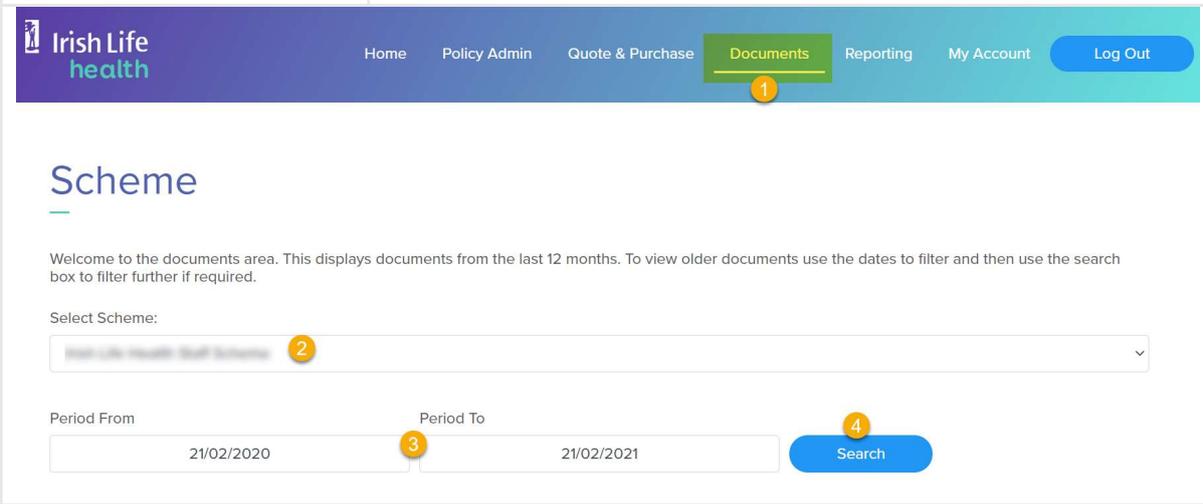
**Premium Breakdown**

Name	Premium	Risk Equalisation Premium Credit	Levy	Gross Premium (before Group Discount)	Group Discount	LCR Loading	Net Premium	Tax Relief	Total Due
NEW MEMBER	€1,175.73	€0.00	€383.80	€1,175.73	€117.57	€0.00	€1,058.16	€170.96	€887.20

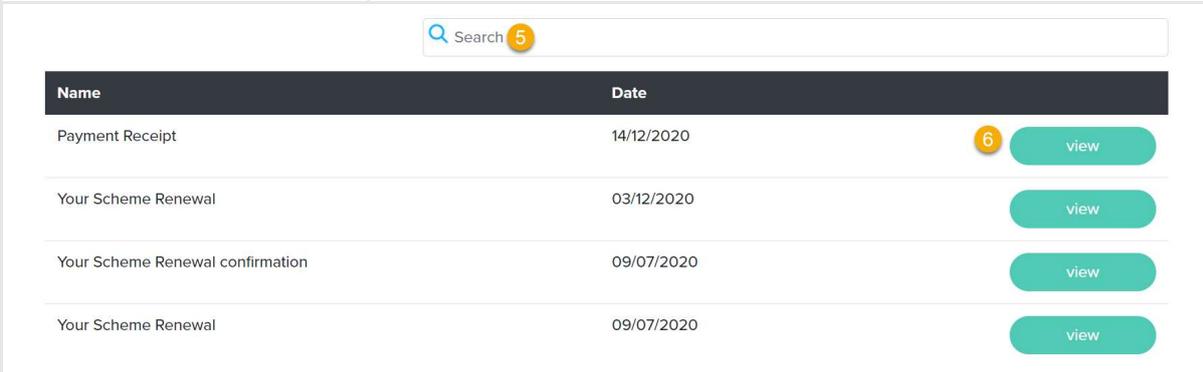
Three buttons at the bottom: "Create a new quote" (blue), "Edit this quote" (blue), and "Continue to Payment" (green). Red arrows point from the "Premium Breakdown" table to each button.

## 10 Documents

1	Click the Documents page from the main menu / toolbar.
2	Select a Scheme.
3	Enter a Period From and Period To date.
4	Click Search.



5	You can search within results by typing criteria in the Search box.
6	Click View to open a document.



Name	Date	
Payment Receipt	14/12/2020	<a href="#">view</a>
Your Scheme Renewal	03/12/2020	<a href="#">view</a>
Your Scheme Renewal confirmation	09/07/2020	<a href="#">view</a>
Your Scheme Renewal	09/07/2020	<a href="#">view</a>

# 12 Reporting

## 12.1 Scheme Invoices Report

1	Click the Reporting page from the main menu / toolbar.
2	Click the scheme drop-down list and click a scheme to open the scheme report.
3	Click the Show the Reports button.
4	The first tab (Invoices) shows a list of invoices for the scheme.
5	Click the Excel button to export the Scheme invoices list to excel. Click the Copy button to copy the list.
6	Search within results to filter the list.
7	Each invoice can be viewed at Member Level or Policy Level. Click the Open button to open the invoice.
8	More documents are available on subsequent pages.

The screenshot displays the 'Reporting' section of the Irish Life Health Live system. At the top, there is a navigation bar with 'Reporting' highlighted. Below this, the 'Scheme Reports' section is visible, featuring a dropdown menu to 'Select the scheme to run reports' and a 'Show the reports' button. A tabbed interface shows 'Invoices' as the active tab. Below the tabs, there is a 'Scheme Invoices' section with a search bar and a table of invoices. The table has columns for Invoice Number, PO Number, Date From, Date To, Amt Due, Due, Member Level, Policy Level, and View. The first row of the table shows an invoice for 2017-01-30 with an amount due of €54,520.72. The interface also includes a 'Copy' and 'Excel' button, and a pagination control at the bottom showing 'Showing 1 to 10 of 54 entries'.

## 12.2 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.
<b>Note</b>	Click the Policy link to view the individual policy activity.

The screenshot shows the 'Scheme Activity' report interface. At the top, there are navigation tabs: 'Invoices', 'Activities' (highlighted with a '1'), 'Member Listing', 'Pre-renewal', and 'End of Year Premiums'. Below the tabs, the title 'Scheme Activity' is displayed. A sub-header reads 'Select a month and year to view all relevant activities for scheme members that month.' There are two dropdown menus: one for the month (showing 'Jan' with a '2') and one for the year (showing '2021' with a '3'). To the right of these is a green button labeled 'Get Policy Activities' with a '4'. Below the filters are two buttons: 'Copy' (with a '5') and 'Excel'. A search box is also present with a '6'. At the bottom, a table header is visible with columns: 'Details', 'Date of activity', 'Policy Number', 'Member Number', 'Name', 'Date of Birth', 'Role', and 'Plan'.

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

### Note

Click the Excel document in the downloads folder.

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

The screenshot shows an Excel spreadsheet titled 'Reporting - ILH Live'. The spreadsheet contains a list of activities with the following columns: 'Details', 'Date of activity', 'Policy Number', 'Member Number', 'Name', 'Role', 'Plan', 'Renewal Date', 'Total Gross Prem Total TRS', 'Total Net Premi', 'Gross Premi TRS - Grou', 'Net Premi', 'Gross Premi, TRS - Mem', and 'Net Premium'. The data is filtered for January 2021. The first few rows show activities like 'Renewal', 'Cancellation', and 'Renewal' for various policy numbers and member numbers. The spreadsheet is displayed in a window with standard Excel interface elements like the ribbon and formula bar.

## 12.3 Member Listing Report by Scheme

<b>1</b>	Click the Member Listing tab (with the relevant Scheme selected).
<b>2</b>	Click Get Member Listing.

The screenshot shows the 'Member Listing' tab selected in a navigation menu. Below the menu, there is a 'Member Listing' heading and a sub-heading 'Get an up to date list of all members (and dependants) on the scheme.' A green 'Get Member Listing' button is present. Below this are 'Copy' and 'Excel' buttons, and a search input field. A table of member data is displayed with columns: Scheme Code, Scheme Name, Member Number, Policy Number, Staff Number, First Name, Last Name, Date of Birth, and Member Type. A pagination bar at the bottom shows 'Showing 1 to 10 of 474 entries' and a page selector with 'Previous', '1', '2', '3', '4', '5', '...', '48', and 'Next'.

<b>3</b>	You can copy or export the listing to Excel as with all other reports. Click the Copy or Excel buttons.
<b>4</b>	You can Search within the results to filter results.
<b>5</b>	Clicking an individual policy link routes you to that policy.
<b>6</b>	Additional records are available on subsequent pages.
<b>Note</b>	Clicking the Excel button creates a download of the report available in your downloads folder.

## 12.4 Pre-Renewal Report by Scheme

1	Click the Pre-renewals tab to view the Pre-renewal Report for the scheme where it is available. This will only be available 32 days before to a renewal date.
2	Click the Get Scheme Renewals button.
3	Click the Excel button to export the list to Excel. Click the Copy button to copy the list.
4	You can Search within results.
5	The list of all the scheme members who currently have open Renewal invitations will be displayed.
<b>Note</b>	Clicking a Policy link will allow you to view the individual policy.

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

This report will only display data in the table if the scheme is at pre-renewal stage.

This report can only be run once the scheme renewal has generated.

The screenshot shows the 'Pre-renewal Report' interface. At the top, there are navigation tabs: 'Invoices', 'Activities', 'Member Listing', 'Pre-renewal' (highlighted in green), and 'End of Year Premiums'. A callout '1' points to the 'Pre-renewal' tab. Below the tabs, the title 'Pre-renewal Report' is displayed, followed by the instruction 'Get a list of all the open Renewal Invitations on this scheme.' A yellow information box states: 'Your pre-renewal report will become available to you as soon as the renewal quotes on your scheme have issued. These quotes typically issue approximately 32 days prior to your renewal date.' Below this is a 'Get Scheme Renewals' button with callout '2'. Underneath are 'Copy' and 'Excel' buttons with callout '3', and a 'Search:' input field with callout '4'. A table header is visible with columns: 'Scheme Code', 'Scheme Name', 'Member Number', 'Policy Number', 'Staff Number', 'First Name', 'Last Name', 'Date of Birth', 'Member Type', and 'Renew Date'. The table content area shows 'No data available in table' with callout '5'. At the bottom, it says 'Showing 0 to 0 of 0 entries' and has 'Previous' and 'Next' navigation links.

## 12.5 End of Year Premiums Report by Scheme

1	Click the End of Year Premiums tab to view the Tax Rebate Report.
2	Click the View Tax Rebate Report button.
3	Click the Export to Excel button to export the list to Excel.
4	You can Search within results.
5	Clicking a Policy link will allow you to view the individual policy.
6	Click subsequent pages to view more results.

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

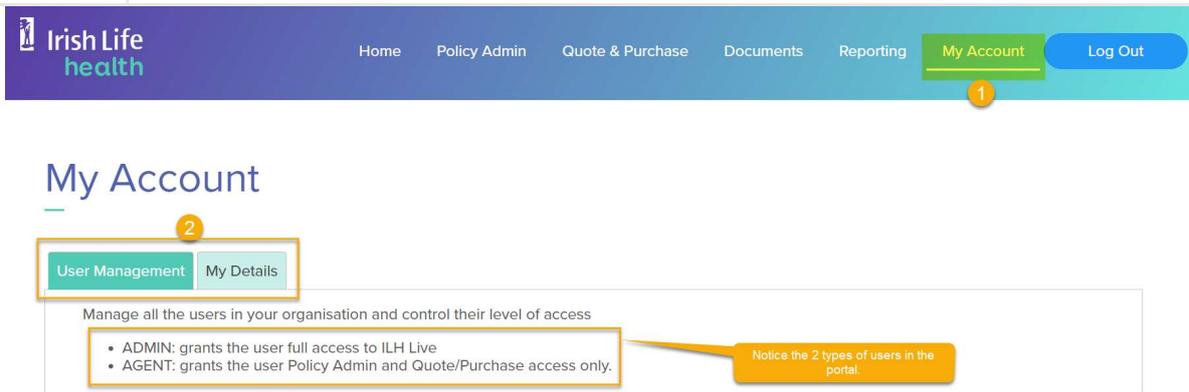
The screenshot shows the 'End of Year Premium Report' interface. At the top, there are navigation tabs: Invoices, Activities, Member Listing, Pre-renewal, and **End of Year Premiums** (callout 1). Below the tabs, the title 'End of Year Premium Report' is displayed, followed by the instruction 'Get a statement for premiums paid in 2020.' A green button labeled 'View Tax Rebate Report' (callout 2) is visible. Below this, there is a search bar labeled 'Search:' (callout 4) and a blue button labeled 'Export to Excel' (callout 3). The main content is a table with the following columns: Year, Policy number, Member name, Employee ID, Gross Premium, Tax Relief, and Net Premium. The table contains 10 rows of data for the year 2020. A callout 5 points to a blue link under the 'Policy number' column of the fifth row. At the bottom, there is a pagination control showing 'Showing 1 to 10 of 470 entries' and a set of page numbers: Previous, 1 (highlighted), 2, 3, 4, 5, ..., 47, Next. Callout 6 points to the 'Previous' button.

Year	Policy number	Member name	Employee ID	Gross Premium	Tax Relief	Net Premium
2020		test test		€2.61	€0.52	€2.09
2020		test test		€379.61	€75.92	€303.69
2020		test test		€379.61	€75.92	€303.69
2020		test test		€1,192.92	€200.00	€992.92
2020		test test		€1,192.92	€200.00	€992.92
2020		test test		€1,477.11	€200.00	€1,277.11
2020		test test		€496.47	€99.35	€397.12
2020		test test		€1,476.45	€200.00	€1,276.45
2020		test test		€496.47	€99.35	€397.12
2020		test test		€1,381.25	€200.00	€1,181.25

# 13 My Account

## 13.1 User Management

1	Click the My Account tab from the main menu to view the User Management area.
2	<p>There are 2 tabs in this area:</p> <ul style="list-style-type: none"> <li>• User management, and</li> <li>• My account</li> </ul>
<p>With the User Management tab selected, you can search for existing users, update an existing user’s details and/or create a new user. The My Details tab view shows your own details, templates for download and a list of schemes available under your account.</p>	

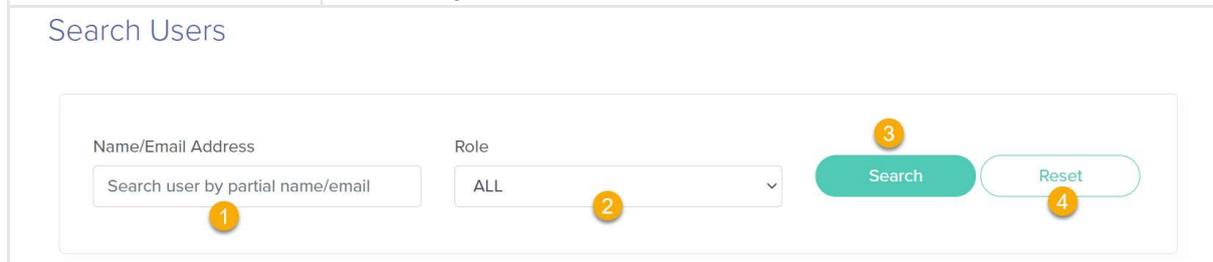


There are 2 types of users in the portal:

- An Admin user gets access to all functionality,
- An Agent user gets access to Policy Admin and Quote/Purchase functionality only.

### 13.1.1 Search for existing Users

1-2	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).
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.



### 13.1.2 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 (callout '2'). The first user is selected, and their role is '[AGENT]' (callout '3'). To the right, there is a panel titled 'Update their role' with two radio buttons: 'ADMIN' (callout '4') and 'AGENT'. Below these buttons 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 panel are two buttons: 'Update' (callout '5') and 'Deactivate' (callout '6').

### 13.1.3 Create a New User

<b>1</b>	If you are an Admin role you will see the Create User area.
<b>2</b>	Enter the new user's name.
<b>3</b>	Enter the new user's email address.
<b>4</b>	Click the role you would like to assign to the new user.
<b>5</b>	Click the Create User button.
<b>Note</b>	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 line of text reads: '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' above it, and 'Email address' with a yellow circle '3' above it. To the right of these fields are two radio button options: 'ADMIN' with an unselected radio button, and 'AGENT' with a selected radio button and a yellow circle '4' above it. At the bottom left, there is a teal 'Create User' button with a yellow circle '5' above it.

## 13.2 My Details

The My Details tab of the My Account page shows:

- your own details,
- useful templates you can download and
- a list of Schemes that are allocated to your account.

User Management **My Details**

### My Details

**Role**  
Scheme Administrator

**Member Number**  
XXXXXXXXXX

**Name**  
XXXXXXXXXX

**Address**  
XXXXXXXXXX  
XXXXXXXXXX

### Useful documents

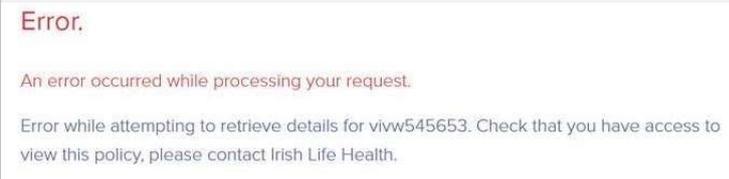
[Health Remittance Template \(Excel\)](#)

### Schemes

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

Prev **1** Next

## 14 Troubleshooting

<b>1. Is it possible to delete a quotation?</b>
No.
<b>2. I get an error message when I try to view a policy.</b>
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.

<b>3. I tried to carry out an endorsement or change to a policy and it wouldn't go through.</b>
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.