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Aviva Life Protection Solutions (ALPS) Business Tracking

Smart, simple and convenient

ALPS Business Tracking is the easy way for you to access your client's protection policy online, providing you with information on new and existing business.

How do I register for Tracking?

All you need to do is head to:

1. our adviser website
2. Log in to your account
3. Select 'Tracking'
4. Click on the 'Register/manage alert updates' button at the top right of the page

Putting you in control

You can get updates on your cases and manage your pipeline through our real-time 24/7 alert service, giving you greater control over your cases. It allows you to choose how and when you stay up to date with applications and existing policies, as well as letting you close cases that are no longer required.

Application activity

See what's going on with your new business cases. From keeping track of what evidence is required to knowing when bank details are needed - this functionality tells you the type of terms offered and what you need to action in order to get your policies live.

Free up your time

We are continually updating the functionality available in our tracking service based on your feedback. Developments have included the ability to view GP details, start a reissued policy and view 12 new underwriting evidence notifications. We aim to make following the progress of a case as easy as possible for you.

Supports retention of your business

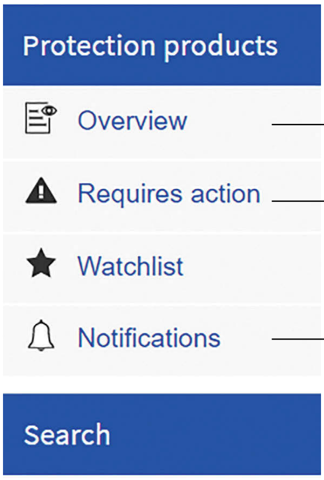
Signing up to our existing business alert service lets you know when clients miss payments and their policy is due to lapse.

New business tracking

In February 2021 there were over 60,000 visits to new business tracking.

How can Tracking help you?

Tracking lets you follow the progress of your new business applications through the quote, apply and purchase journey. It's also the go to place for existing business policy information.



Access the overview screen for a 'one-stop' view.

- Access policy documents
- View our latest policy decisions, including reasons why your clients may have been rated/declined
- Use a wide range of filters to search for individual or groups of clients
- View a summary of your current applications and real-time status updates
- See all notifications and changes on any new business cases including;
  - Evidence that's been requested
  - Terms offered
  - Start date and bank details needed

Your ready made 'to-do' list

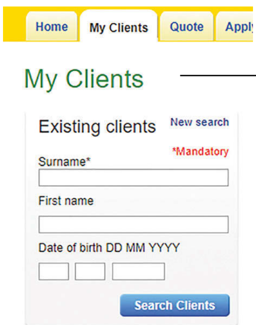
- Use the 'Requires action' screen to stay up to date with any actions you need to take to progress your cases
- Sign-up to our e-mail alert service and we'll let you know when you have new actions to take

Look at your notifications

- Over 150 different alerts across new and existing business keep you up to date with the latest status of your client portfolio
- Existing business notifications let you know when clients have missed payments or cancelled their policy. This gives you the chance to discuss the circumstances with your client and continue, or reinstate, cover where that is the right outcome
- Key notifications include:
  - When further supporting evidence is required for your application, for example: personal health questionnaire, financial accounts or financial supporting evidence
  - When further medical evidence is required
  - When a policy has been issued, closed or referred to underwriting

My Clients

My Clients allows you to service your existing clients effectively, without missing any key updates.



View existing client details

- Here you can access existing policy information, including:
  - An overview of your client's product type, policy status, start date, policy term, current sum assured, lives assured and policy features/benefits
  - Financial information such as premium amount, collection day, premium frequency, direct debit status and premium type
  - View your client's policy documents

For more information please speak to your usual Aviva contact or visit our Adviser site.

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