

Guidance Document

Policy Admin

When viewing a quote/policy you will be able see the following options:



Clone – This can be used if the customer requires another quotation and the original policy was quoted in the last 30 days.

Send Policy Email – This is to be used should the client require the email to allow access to a Customer Account.

Send SMS – Will send a text the client with their policy number/medical emergency number if they have provided a mobile number.

Mid-Term Adjustment – See below.

View Customer – Will take you from the Policy Detail page to the customer record, where all other quotes/MTA/policies can be viewed. Please see below.

Cancel – Only available within the 14 day cooling off period.

The policy details page will also note the status of Quotes, Policies and MTA's as the following:

Issued – The quotation has been issued/purchased (now a policy).

On Cover – The quotation has been purchased (now a policy) and customer is currently on cover/on holiday.

Quote – The quotation is still available to purchase, quoted within the last 30 days.

Applied – Or “incomplete”, the quotation is up to the price delivery page and the home button has been clicked rather than the ‘save and exit’ button.

Expired – The quote was provided over 30 days ago or the start date of the quotation has already passed.

Cancelled – The policy has been cancelled.

Mid-Term Adjustments

The system will allow you to make any Mid-Term Adjustments that are necessary, quoting the applicable AP/RP following the change.

The system will generate version controlled schedules and medical declarations following any changes, the endorsement letter will explain the change. Alongside this, the latest version of the medical declaration/schedule will also be issued. If the client has opted for a Customer Account, then an email will be sent to prompt them to login and retrieve documents. Signpost your client to view the Endorsement document and amended Medical Declaration (if applicable).

MTA quotes will be saved under a MTA quote reference and any previous quotes can be view allowing you to easily track changes. It is important to remember to leave any notes of MTA's or MTA quotes provided in the policy, not just in the MTA reference, so all notes can be viewed from a central point.

For MTA quotes that have not been processed, the Status of this will show as Awaiting Approval. Simply click edit to proceed.

If an AP applies on a policy issued by card, we now need the full card details again to take new payment.

If an RP applies, no need to confirm the last 4 digits of the card, system will automatically refund to that same card. If the client is unsure if that card is still valid then we would need to refund using a different method, contact brokers@aneevo.com for assistance.

It will offer an AMT rate – please ignore this, it is not possible to upgrade from Single Trip to Annual mid-term at this time.

Please note any AIG MTA's or cancellations which result in a system generated return premium, must be referred to Aneevo to process due to enhanced sanctions monitoring.