



eSolutions

Your guide to quoting and applying for Healthier Solutions – our individual private medical insurance

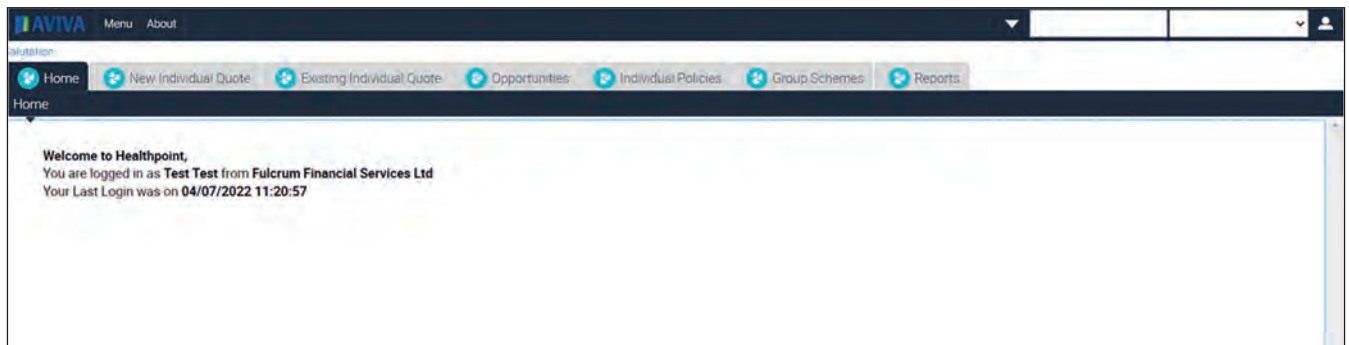
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This is your guide to eSolutions, our system that allows you to quote and apply for our Individual PMI products online.

For support and assistance in using eSolutions, or this guide, contact your Trading Centre Consultant.

1. The eSolutions home page





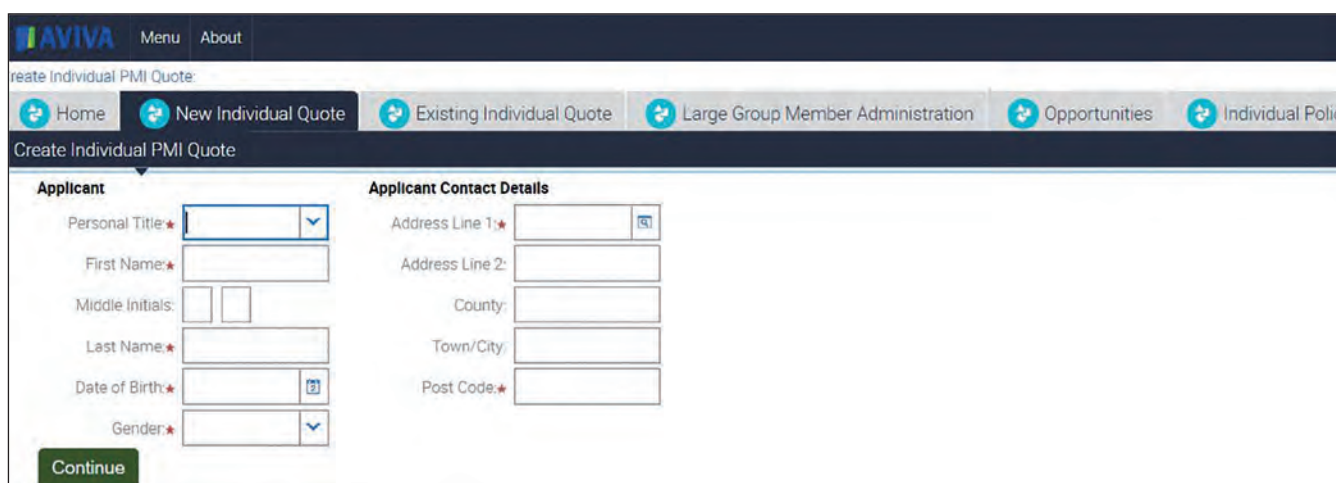
From the eSolutions home page you will be able to perform various tasks using the tabs across the top of the screen.

These include:

- Creating a new or individual quote
- Viewing an existing quote
- Amending an existing quote
- Applying for an existing quote

2. Creating a new individual quote

1. From the eSolutions Home Page, select the **New Quote** link to be taken to the New Quote Selection Menu. From here select **New Individual Quote**. This will take you to the Applicant Details page.
2. Enter all applicant details into the relevant section. Use the  button to bring up the Pick Address dialogue box.
3. In the Pick Address dialogue box, enter the first line of the applicants address and their post code. Once you have done this click **Go**.
4. You will be presented with a list of addresses to match your search criteria. Select the  next to the address of the applicant and click **OK** to automatically populate the applicants address. If more than 10 addresses have been found, you can use the arrows in the top right hand corner to navigate between pages. If their address was not found, click the **New** button to enter the applicants address.




AVIVA Menu About

Create Individual PMI Quote:

Home New Individual Quote Existing Individual Quote Large Group Member Administration Opportunities Individual Policy

Create Individual PMI Quote


Applicant


Personal Title: 

First Name:


Middle Initials:

Last Name:

Date of Birth: 

Gender: 

Applicant Contact Details

Address Line 1: 

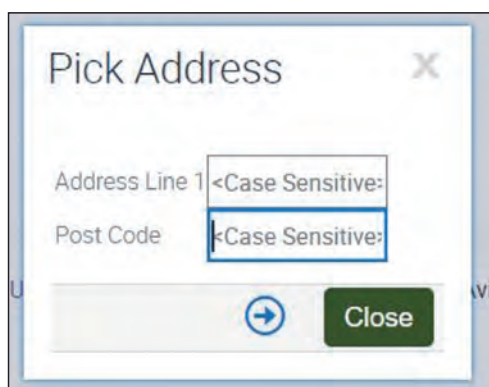
Address Line 2:

County:

Town/City:

Post Code:


Continue

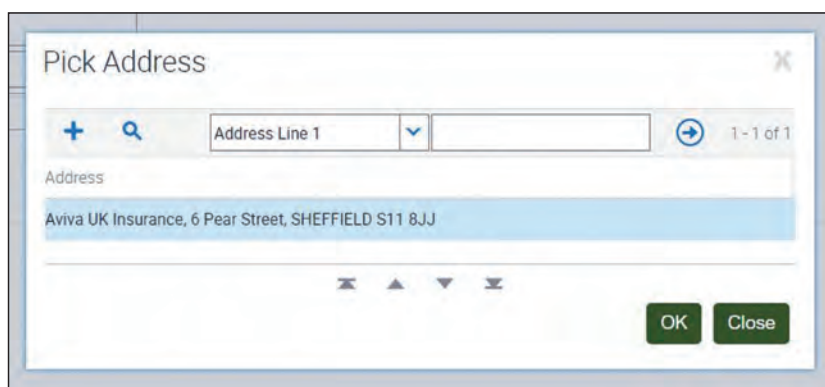


Pick Address




Address Line 1: <Case Sensitive:

Post Code: <Case Sensitive:

 Close




Pick Address

+  Address Line 1   1 - 1 of 1

Address

Aviva UK Insurance, 6 Pear Street, SHEFFIELD S11 8JJ



OK Close

5. Once all applicant details are complete, click **Continue**.

AVIVA TEST - HEALTHIER SOLUTIONS - 04/22/2021 15:50:59

Save & Quote **View Contact Details**

Intermediary Details (Req For Quote)

Agent:

Agreement:

Quote Owner:

Business Type

Business Type:

Current Insurer:

Current Insurer Premium:

Current Premium Freq:

Current Insurer Product:

Renewal Date:

Renewal Premium:

Scheme:

Switch From Type:

Pre-Sales UW Ref:

Supporting Information

Competitors:

Campaign Code:


6. Use the buttons to enter Agent and Agreement details. Select the required option by clicking the to highlight it, and then click **OK**.
7. If the applicant is currently with another insurer, use the drop down box to select Switch Business and then click to select the applicant's current insurer. Once you have done this, complete all other current insurer details.
8. Click **Save & Quote** button.

- Click the **New Quote** button. This will present you with a pop up window which will contain the eSolutions quote interface.

- Use the text and drop down boxes to enter initial quote details, click the calendar icon to enter the proposed policy start date or type in the correct date. Once all details are complete, click the **Continue** button. If at any point you wish to leave the quote interface, click the **Exit** button.



11. Use the text and drop down boxes to enter information for all people to be covered on the policy. Once all information is complete, click **Continue**. If at any point you wish to save any entered data for later use, click **Save**.



Details > Quote > Application > Payment > Exit

QuoteID : PMIQA801945655

Members Personal Details (* indicates mandatory fields)

	Member Type:	Gender:*	Title:*	Forename:	Initial:	Surname:	Date of Birth:*	Age:*
1	Primary Membe	<input checked="" type="radio"/> M <input type="radio"/> F	Mr	Test		Testing	5 / 8 / 1979	40
2	Partner	<input type="radio"/> M <input checked="" type="radio"/> F	Mrs	Tester		Testing	13 / 04 / 1979	40


Back

Exit

Save

Continue

12. Use the buttons and drop down boxes to enter all member information and click **Continue**.



Details > Quote > Application > Payment > ExitQuoteID : PMQA21090944

Members Terms (* indicates mandatory fields)

	Member Name	Date of Birth	Age	Underwriting Terms*
1	Mr Aviva Test	23/5/1976	44	NMORI


The Underwriting Terms chosen are used to calculate the premium

BackExitSaveContinue

[?] [Health Solutions] [##MOUNTAIN##] [UAT] [membersTerms]30 mins remaining



13. Use the drop down button to enter member claims information (this is only applicable for switch business) and click **Continue**.



Details > Quote > Application > Payment > Exit

QuoteID : PMIQA801945655

Members - Discount Level / Claims (* indicates mandatory fields)

Please select the number of years claims free for all members

Member Name	Claims Free Years
1 Mr Test Testing	5 Years or more or never claimed ▼
2 Mrs Tester Testing	3 ▼

* Please choose never claimed if the customer has been insured on an MHD basis for at least 12 months and they have not claimed in that time.

Back

Exit

Save

Continue

14. Use the buttons and drop down boxes to select which options are required for the quote. You are also able to view which hospitals are closest to the applicant. Once all the required options are selected, use the drop down box to select a payment method and click **Calculate**. Once you have done this a quotation premium will be displayed.

AVIVA

Details > **Quote** > Application > Payment > Exit QuoteID : PMQA21090944

Quotation (* indicates mandatory fields)
 For details of core cover [click here](#)

Ways to increase your cover

[Other Treatments and Therapies](#) ☐

[Protected NCD](#) ☐

[Dental and Optical](#) ☐

[Psychiatric Treatment](#) ☐

Ways to keep the cost down

[Reduced Out-Patient Cover](#) ☐ No

[Six Week Option](#) ☐

[Excess](#) ☐ £200

[Speedy Diagnostics](#) ☐

Hospital Options

[Expert Select](#) ☒

[Key Hospital List](#) ☐

[Trust Hospital List](#) ☐

[Extended Hospital List](#) ☐

Expert Select is not available for policies starting before 1st March 2021

Expert Select
 Our experienced claims team will provide you with a selection of quality approved hospital facilities and specialists in your area, and help you to book your appointment with your chosen specialist.


If you have any queries relating to the benefits or premium of this quote please contact your appointed sales consultant.

The premium cannot be calculated until all selections are made and calculate is selected.

Payment Method* Monthly DD v

15. Once a quotation premium has been displayed, you are able to amend the quotation by selecting different options or payment methods and clicking the **Calculate** button again. You are also able to view a description of each of the options by clicking their name. Once you are happy that all details are correct, click **Accept** to complete the current quote. You also have the option to update any member details using the **Update** button and make a copy of the quote using the **Copy** button.

16. The Quote Completed screen will contain details about the quote you have just produced. From this screen you will be able to perform a number of tasks. Clicking the PDF icon will open a printable version of the Quote Application Form. It is also possible to produce a re-quote by clicking **Copy**. Clicking **Apply** will take you to the application stage and allow you to apply for this particular quote.



Details > Quote > Application > Payment > ExitQuoteID : PMIQA21090944

Quote Completed

Cover Details

Benefits

- Hospital List : Expert Select
- Excess : £200
- Other Treatments and Therapies : No
- Protected NCD : No
- Dental and Optical : No
- Reduced Out-Patient Cover : No
- Speedy Diagnostics : No
- Six Week Option : No
- Psychiatric Treatment : No

Name	DOB	Age	Premium	NCD Level	Underwriting Type
Mr Aviva Test	23/5/1976	44	£52.00	12	NMORI

Our downloads are in a PDF format. To read them you'll need to have Acrobat Reader 4.0™ or above, we think most of you will have this. If you haven't it's free and can be downloaded from [Adobe UK](#) . If you are accessing this website using screen reading technology that cannot read PDF's, a converter is available at [Access Adobe](#).

Monthly premium payable by Direct Debit is :

£52.00

(Annual premium of £624.00), Inclusive of Insurance Premium Tax at the appropriate rate.


Apply Now

Copy

Click for Healthier Solutions IPID

Click for Speedy Diagnostics IPID

Exit



Click for PDF Document

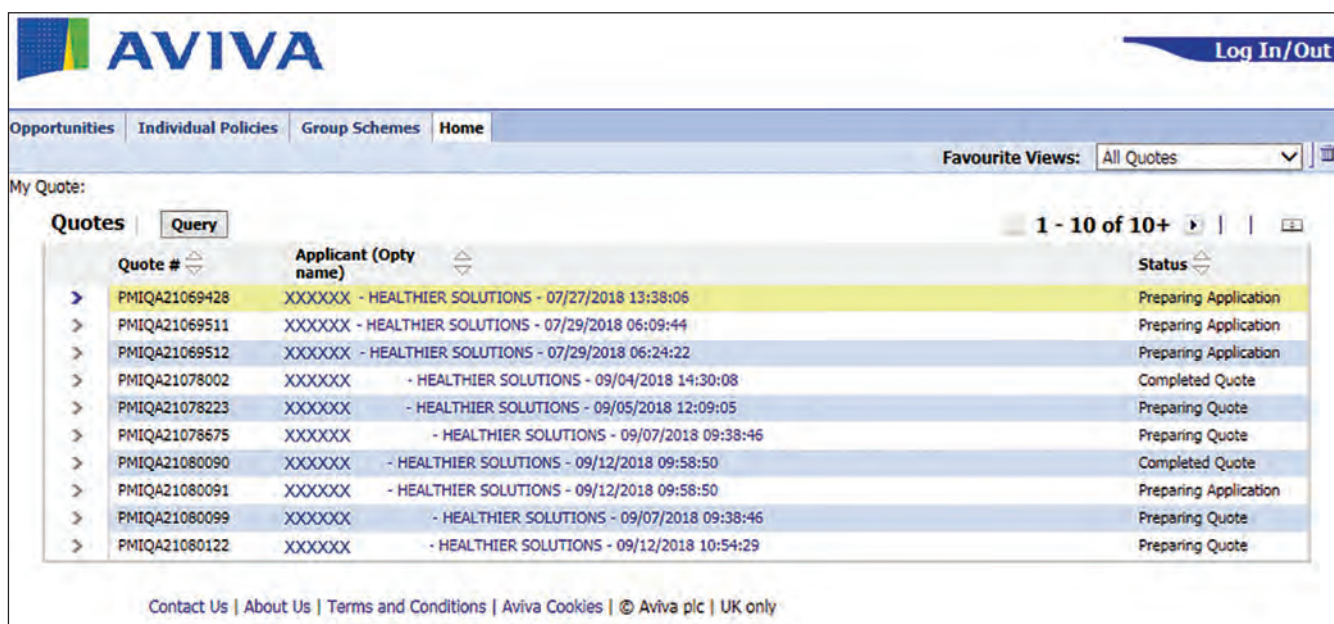
[?] [Health Solutions] [##MOUNTAIN##] [UAT] [quoteCompleted]

30 mins remaining

3. Identifying an Existing Quote/Opportunity

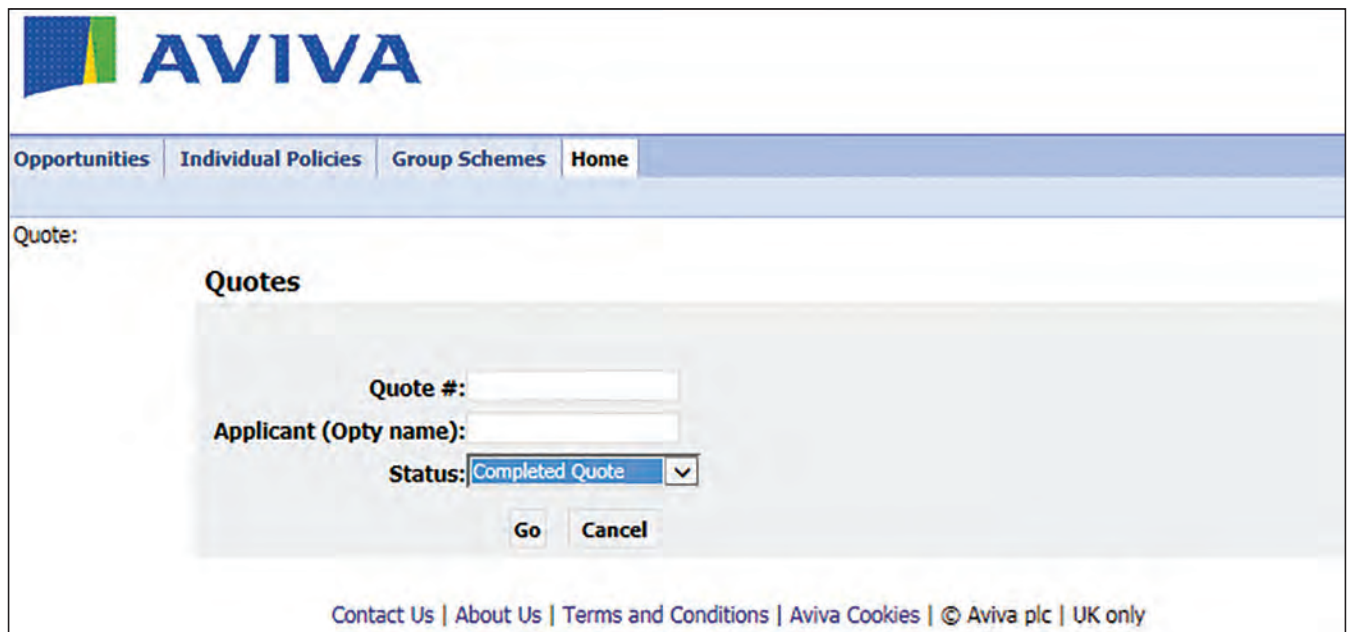
1. From the eSolutions home page, select the **Existing Quotes** link. From here you will be able to view any quotes which you have created by clicking the **My Quotes** link. Clicking **View All Quotes** will allow you to search for any quotes which have been produced by your organisation.

By clicking **My Quotes** you will be presented with a list of quotes which you have produced and their current status. The arrows in the top right hand corner of the menu can be used to navigate between the different pages. There is also the option to query your quotes by clicking **Query**.



Quote #	Applicant (Opty name)	Status
PMIQA21069428	XXXXXX - HEALTHIER SOLUTIONS - 07/27/2018 13:38:06	Preparing Application
PMIQA21069511	XXXXXX - HEALTHIER SOLUTIONS - 07/29/2018 06:09:44	Preparing Application
PMIQA21069512	XXXXXX - HEALTHIER SOLUTIONS - 07/29/2018 06:24:22	Preparing Application
PMIQA21078002	XXXXXX - HEALTHIER SOLUTIONS - 09/04/2018 14:30:08	Completed Quote
PMIQA21078223	XXXXXX - HEALTHIER SOLUTIONS - 09/05/2018 12:09:05	Preparing Quote
PMIQA21078675	XXXXXX - HEALTHIER SOLUTIONS - 09/07/2018 09:38:46	Preparing Quote
PMIQA21080090	XXXXXX - HEALTHIER SOLUTIONS - 09/12/2018 09:58:50	Completed Quote
PMIQA21080091	XXXXXX - HEALTHIER SOLUTIONS - 09/12/2018 09:58:50	Preparing Application
PMIQA21080099	XXXXXX - HEALTHIER SOLUTIONS - 09/07/2018 09:38:46	Preparing Quote
PMIQA21080122	XXXXXX - HEALTHIER SOLUTIONS - 09/12/2018 10:54:29	Preparing Quote

- By clicking **View All Quotes** you will be presented with a number of search options. Type the required information into the relevant search box and click **Go**. You will be presented with a list of search results.



The screenshot shows the Aviva website's navigation bar with links for Opportunities, Individual Policies, Group Schemes, and Home. Below the navigation bar, the 'Quote:' section is visible. The 'Quotes' search form includes input fields for 'Quote #', 'Applicant (Opty name)', and a dropdown menu for 'Status' (currently set to 'Completed Quote'). There are 'Go' and 'Cancel' buttons at the bottom of the form. The footer contains links for Contact Us, About Us, Terms and Conditions, Aviva Cookies, and copyright information for Aviva plc, UK only.

- To navigate into a quote, click the blue link which contains the name of the quoted applicant or company.

4. Re-quoting an Existing Individual Quote

1. Identify the existing quote via the My Quotes or View All Quotes menu and navigate in to it using the blue link containing the applicant's name.
2. Once you have navigated into the relevant quote, ensure the correct quote is highlighted and click **Continue Quote** this will be present you with the eSolutions quote interface. Then click **Copy**.

AVIVA

Details > Quote > Application > Payment > Exit QuoteID : PMQA801945655

Quote Completed

Cover Details

Benefits

- Hospital List : Key Hospital List
- Excess : £200
- Other Treatments and Therapies : No
- Protected NCD : No
- Dental and Optical : No
- Reduced Out-Patient Cover : No
- Six Week Option : No
- Psychiatric Treatment : No

Name	DOB	Age	Premium	NCD Level	Underwriting Type
Mr Test Testing	5/8/1979	40	£96.56	12	CME
Mrs Tester Testing	13/04/1979	40	£115.25	10	CME

Monthly premium payable by Direct Debit is : **£211.81**

(Annual premium of £2,541.72), Inclusive of Insurance Premium Tax at the appropriate rate.

[Apply Now](#)  [Click for PDF Document](#)

[Copy](#)

[Click for Healthier Solutions IPID](#)

[Click for Speedy Diagnostics IPID](#)

[Exit](#)

Our downloads are in a PDF format. To read them you'll need to have Acrobat Reader 4.0™ or

3. A new quote will be created and you will be taken back to the initial quote screen. Continue to navigate through the various quote screens using the **Continue** button, amending any details where necessary. For further information on how to do this refer to **Section 2. Creating a New Individual Quote**.
4. Once you have completed the re-quote you will be taken back to the quote completed screen. From here you will be able to apply for the quote using **Apply Now**, produce another re-quote by clicking **Copy** again or navigate out of the quote interface by using the **Exit** button. When back in the quote information screen, click **Refresh** above the list of quotes to display details of any re-quotes just produced.

5. Applying for an Existing Individual Quote


1. Identify the existing quote via the My Quotes or View All Quotes menu and navigate in to it using the blue link containing the company name.
2. Once you have navigated into the relevant quote, ensure the correct quote is highlighted and click **Continue Quote** this will be present you with the eSolutions quote interface. Then click **Apply Now**.

The screenshot displays the Aviva eSolutions quote interface. At the top, the Aviva logo is on the left, and a navigation bar shows 'Details > Quote > Application > Payment > Exit'. The 'QuoteID' is 'PMIQA801945655'. The main section is titled 'Quote Completed'. On the left, under 'Cover Details', a list of benefits is shown: Hospital List: Key Hospital List, Excess: £200, Other Treatments and Therapies: No, Protected NCD: No, Dental and Optical: No, Reduced Out-Patient Cover: No, Six Week Option: No, and Psychiatric Treatment: No. Below this is a table with two rows of quote details.

Name	DOB	Age	Premium	NCD Level	Underwriting Type
Mr Test Testing	5/8/1979	40	£96.56	12	CME
Mrs Tester Testing	13/04/1979	40	£115.25	10	CME

On the right side, the 'Monthly premium payable by Direct Debit is' is prominently displayed as '£211.81'. Below this, a note states '(Annual premium of £2,541.72), Inclusive of Insurance Premium Tax at the appropriate rate.' There are three buttons: 'Apply Now' (blue), 'Copy' (blue), and 'Exit' (yellow). A PDF icon with the text 'Click for PDF Document' is also present. At the bottom, there are two links: 'Click for Healthier Solutions IPID' and 'Click for Speedy Diagnostics IPID'. A footer note at the bottom left states 'Our downloads are in a PDF format. To read them you'll need to have Acrobat Reader 4.0™ or'.

3. If the Applicant is switching from another insurer a Switch Declaration will need to be completed. Respond to this by using the radio buttons to select a response to each question and click **Continue**. (This screen is only applicable for Switch business).



Details > Quote > Application > Payment > Exit
QuoteID : PMIQA801945655

Switch Declaration
(*) indicates mandatory fields)

- Have you or any person to be covered by this policy experienced symptoms, or had any consultations, tests or treatment in the last 12 months or do you currently have appointments planned with a GP, Specialist or a hospital in the future? *

☒ Yes
☐ No
- Have you or any person to be covered by this policy had any consultations, tests, medication or treatment in the last 5 years relating to any:-
 - Type of cancer or suspected cancer (if the consultations or tests are part of routine NHS screening programmes and resulted in no further action then you do not need to tick yes to this question).*

☐ Yes
☒ No
 - Form of heart or circulatory or vascular conditions or symptoms (including stroke, hypertension and raised cholesterol), or diabetes.*

☐ Yes
☒ No
 - Psychiatric or mental illnesses or conditions (only relevant if selecting the mental health Option)*

☐ Yes
☒ No

Exit


Save

Copy

Continue

- 3a. If “yes” is selected on the Switch Declaration, you will be directed to the below screen where your application is paused and we will have to unlock this for you.

To do this all you have to do is **contact us** at the trading centre and provide a risk agreement from your consultant.



AVIVA

Details > Quote > Application > Payment > Exit

QuoteID : PMIQ8019456

The application has been submitted for review and approval by Aviva.

Thank you for using the Aviva Quote & Apply service.

This session has now been terminated - to restart the session, reselect the quote in Siebel.

You may now close this window.



4. Next you will need to enter the details of the Bank Account that the applicant wishes premiums to be taken from.
- If the payer is a different person/party than whom the policy is for, then the **correct Payer must be selected** from the drop-down menu at the top.
 - 'Other Individual' might be a parent if the policy is for a child.
 - 'Other Company' might be their employer or a finance company.

Failure to select the correct Payer type at this point, is likely to result in a delay in enrollment or activation of the policy.

- When entering Bank Account details, you will need to enter the account name, number and sort code and click the **Lookup Bank** button. This will validate the details entered and display the holding branch of the account. Once all details are correct, select one of the options below to confirm whether you have read out the Direct Debit script to the applicant or you will be forwarding a signed customer copy of the Direct Debit mandate. Once the correct option is selected, click **Continue**.

The screenshot displays the Aviva Health policy setup interface. The 'Who is Paying for the Policy?' section features a dropdown menu with 'Other Company' selected and circled in orange. Below this, the 'Payer contact details' section includes fields for Company name, Title (Mr), First name, Last name, Telephone, Address1, and Postcode, along with 'Lookup Address' and 'New Address' buttons. The 'Payer account details' section includes fields for Account name, Account number, and Sort code, a 'Lookup Bank' button, and two radio button options for Direct Debit confirmation. On the right, the 'Payer Details' summary shows the Name (Mr Aviva Health), Address (Aviva UK Insurance, 6 Pear Street, SHEFFIELD, S11 8JJ), and Telephone. Below this, a box highlights the 'Monthly premium payable by Direct Debit is : £51.58', with a note that the annual premium is £618.96, inclusive of Insurance Premium Tax.

Who is Paying for the Policy:* Other Company ▼
Before your cover starts we need y Aviva Health and then press Lookup bank.
Other Individual
Other Company

Payer contact details

Please enter GA Name, Company Address and Telephone number.

Company name:*

Title: Mr ▼

First name: Last name:*

Telephone:

Address1:

Postcode:*

Lookup Address New Address

Payer account details (* indicates mandatory fields)

Account name:*

Account number:*

Sort code:*

Lookup Bank

One of the following must be selected:

☐ I have a signed customer copy of the Direct Debit mandate and will forward it to Aviva*

☐ I have read out the Direct Debit script *

Payer Details

Name Mr Aviva Health

Address Aviva UK Insurance
6 Pear Street
SHEFFIELD
S11 8JJ

Telephone

Monthly premium payable by Direct Debit is :

£51.58

(Annual premium of £618.96), Inclusive of Insurance Premium Tax at the appropriate rate.

5. Review all details and ensure they are correct. Once satisfied, click the **Submit & Exit** button to complete the application process. Once you have done this you will be able to close the quote interface window and return to the quote list. If you click the **Refresh** button above the quote list the status of the quote you have just applied for will change to 'Application Submitted'.

Instruction to your Bank or Building Society to pay by Direct Debit

Service User Number

853820

Aviva Health UK Limited
Chilworth House
Hampshire Corporate Park
Templers Way
Eastleigh
Hampshire
SO53 3RY


Instruction to your Bank or Building Society to pay by Direct Debit

Please pay Aviva Health UK Limited Direct Debits from the account detailed in this instruction subject to the safeguards assured by the Direct Debit Guarantee. I understand that this instruction may remain with Aviva Health UK Limited and, if so, details will be sent electronically to my Bank / Building Society.

The company name that will appear on your bank statement against the Direct Debit is "Aviva".


Banks and Building Societies may not accept Direct Debit Instructions for some types of account.


Please print and save the [Direct Debit Guarantee](#)




By clicking the submit button, the policy will be incepted and the customer will go on risk with us. If you choose not to obtain a customer signature on the application form, you are reminded of your responsibilities under the heading "Signature Free Process" in the Terms and Conditions which govern your use of this system (see link at the bottom of the home page). In any event, you are also specifically reminded of the Terms of Business that govern your agency appointment with us and your attention is particularly drawn to Paragraphs 1.2 and 12 thereof.

This application has been successfully completed and can be submitted for processing

 Back

 Exit

 Submit & Exit





| Retirement | Investments | Insurance | Health |

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This insurance is underwritten by Aviva Insurance Limited. Registered in Scotland, No. 2116. Registered Office: Pitheavlis, Perth, PH2 0NH. Authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Firm reference number 202153.

Aviva Health UK Limited acts as agent of Aviva Insurance Limited for the purposes of: (i) receiving premium from our clients; and (ii) receiving and holding claims money and premium refunds prior to transmission to our client making the claim or entitled to the premium refund.

www.aviva.co.uk/health

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