

Adviser Self Service – Existing Business View for IFAs

Quick Reference Guide

What is the Existing Business View?

The Existing Business View gives you real-time visibility of your customers' policies, providing insights, improving efficiency and user experience.

How to Access the Existing Business View

1. Log in to your Adviser Hub.
2. Select "Existing Business" from the navigation menu.
3. The view will open in a separate browser tab.

Key Features & Navigation Tips

- › **Dynamic Search Capability:** Easily locate policy information by customer name or policy number, or use quick navigation options to see policies with upcoming anniversaries or policies in arrears.
- › **Real-Time Data:** Data is refreshed every time you login to the Adviser Hub or click 'Update Data'.
- › **Device Compatibility:** Use on desktop, tablet, or mobile. For best experience, use desktop or tablet in landscape mode.
- › **Data Download:** Use the download button to export your customer data as a JSON file, which can be uploaded into your CRM system.
- › **Switching Tabs:** The view opens in a new tab. Switch back to Adviser Hub using your browser tabs.
- › **Sorting:** All columns can be used to sort by, so you can see the information exactly how you want it.
- › **Policy Detail View:** Click into any policy to access more detailed information, launch a Quote for Alteration (QFA) or link directly to the full policy details.
- › **Email integration:** Click an email address in the portal to open Outlook with the address pre-filled.
- › **Screen Issues:** Maximise your browser or zoom out (Ctrl + - or Cmd + -). If the issues persists, try a different browser or device.

Frequently Asked Questions

Can I generate policy documents?

No, you will need to request these as per the current process.

Can I add notes to policies or make changes?

No, but we are investigating the ability to introduce this functionality in the future.

Can I identify all my customers that have a particular outstanding requirement?

We are considering insights and reporting to enable you to identify types of outstanding requirements.

How can I see multiple policies for a customer?

You can only view one policy at a time as each policy type is treated separately.

Will I see updates to the policies in real time?

Yes, our teams' action any updates which will be reflected in your data view as soon as they come in.

How long does it take to load?

When you first log in, it can take 10 – 20 seconds to load your data.

Whose policies can I see?

You can see all the policies you are the servicing Adviser for. We are working on future updates including the ability to see other Advisers in your business policies.

Will out-of-force clients still show in Existing Business, and will they be marked as out of force?

Advisers will have visibility of out of force life assured members on a policy with clear indication that they are out of force.

Does the Existing Business view show all historic changes made since policy inception, or only the policy as it is today?

The Existing Business view provides a snapshot of the policy as it is today. It does not show the full history of a policy.

My customer made a manual payment; however, the policy is still in arrears. What's happened to the payment?

The payment may not have been fully applied yet, depending on the payment type and timing:

- › **Direct debit / double deduction:** Can take up to 3 days for the payment to process in the system and is reflected in Existing Business.
- › **Credit card payment:** These are usually applied on the same day, depending on the time the payment was made we suggest you check again later today or tomorrow.
- › **Manual payment:** This payment should be applied in the system on the day the payment was made (depending on the time). If it is not showing please check again later today or tomorrow.

Why does the download file in Existing Business look like code?

The file downloaded from Existing Business is a JSON file. It is structured for ingestion into the adviser's CRM, so it is not intended to be opened in Excel or another view-friendly application. While it may appear technical, that is the expected format for this file.

Is there a date limit for the policies shown?

No. Existing Business shows all* policies In force, Out of force and In force waiver premium policies regardless of commencement date. If a policy commencement date is after 9 June 2008, the "Create a quote (QFA)" button will appear in the drawer.

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When will a policy become visible to the new Adviser after change of servicing Adviser?

Once the change of servicing adviser processing is completed and the corresponding renewal Adviser on the policy is updated to the new Adviser in the source system, the new Adviser should be able to see the policy after logging in and refreshing their data.

Support & Troubleshooting

Technical issues:

Contact Chubb IT support hotline **0800 103131**

Policy issues:

Call the Chubb Contact Centre Helpline **0508 464 999**

Resources

Refer to Adviser Self-Serve instructional [video](#)

For further support, contact your BPM.