

Accelerate quote portal

User guide for brokers



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Introduction

Welcome to our Accelerate quote portal user guide which provides a step-by-step guide on how to use Accelerate. In addition to this guide, you can also view our **webinar** which provides a live demonstration on how to use the portal. However, should you have any further queries, please don't hesitate to contact your Account Manager.

Here's a reminder of some of the benefits of Accelerate:

- Receive quotes in minutes*
- Get quotes for Group Life schemes between 10-199 lives
- Best rates first time around
- Apply online to go on risk
- Portal is available 24/7
- Your client's quotes emailed directly to you
- Obtain new quotes, re-quotes and view all your quotes in one place
- Easy to use and user friendly

*There may be instances where an Underwriter decision is required. If so, our standard turnaround time is 10 working days.

Enter your Email and Password to log into the Accelerate portal.

0800 917 2006

select option 2



Log in to Online Services

Reminder: Please direct your customer to our privacy notice, this can be accessed at www.metlife.co.uk and explains how their personal data is collected, shared or processed.

Please ensure you have provided your customer with price information and the pre-sale policy summary before starting the application process.

[Forgot password?](#)

LOG IN

Once logged in, you'll be taken to the 'Home' screen. Here you will see any quotes you have requested and their current status.

The screenshot displays the 'Home' screen of a MetLife application. At the top, there is a blue navigation bar with 'HOME' and 'HELPFUL RESOURCES' links. Below this, a section titled 'EMPLOYEE BENEFITS' contains a dropdown menu for the account (000MetLife Ltd - Orphan Account000) and another for the agent (EB Agent). A blue button labeled '+ START NEW QUOTE' is positioned below these dropdowns. A search bar is present with the text 'Search' and a note that 'Your search will apply to all columns'. The main content is a table of quotes with the following data:

CLIENT	BENEFIT BASIS	COMMISSION	QUOTE EXPIRY DATE	STATUS
+ JADE TEST	4X SALARY	0%	22 May 2021	Quote Completed
+ SEXTON TEST	4X SALARY	0%/4%	22 May 2021	Quote Completed
+ JADE TEST	4X SALARY	0%	22 May 2021	Quote Completed
+ Bonnie Test 7	4.6X SALARY	0%/4%/16%/20%	16 May 2021	On-Risk Application Submitted
+ JOE CANNON TEST	6X SALARY	4%/6%	01 May 2021	Quote Completed
+ Toms Shoes TEST	2.4X SALARY	0%/4%	01 May 2021	Quote Completed
+ Toms Shoes TEST	4X SALARY	0%/4%	01 May 2021	On-Risk Application Submitted

View 1 - 53 of 53

At the bottom left is the MetLife logo. At the bottom right, there is a footer with legal notices, privacy policy, MSA statements, regulatory status, and tax strategy publication information, dated 2017.

Click on the '+' to view quotes or generate requotes:

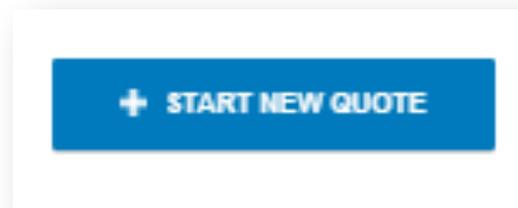
+	Toms Estate agent	4X SALARY	0%	01 Mar 2021	Incomplete
-	Sexton cleaning	2,6X SALARY	10%	01 Mar 2021	On-Risk Application Submitted

VIEW QUOTE

View 1 - 17 of 17

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To start a new quote click on 'Start New Quote':



You will see the below message appear. Note the circumstances and only proceed if your quote falls within these requirements.

If not, please request a quote from ebnewbusiness@metlife.uk.com or speak to our team on 0800 917 2111.

Welcome to MetLife's online quoting portal, Accelerate.

Before we get started, please note that we can only provide a quote using Accelerate in the following circumstances:

- ✓ For Group Life quotes between 10 and 199 lives
- ✓ For a maximum of 5 categories per quotation
- ✓ If the client is not currently insured by MetLife
- ✓ If the client has not made more than 2 claims in the last 5 years of the policy with their existing provider
- ✓ If there are no current adverse medical underwriting decisions made by other insurers against the insured members
- ✓ If the members do not work offshore, for example on an oil or gas rig
- ✓ If all members are on UK contracts of employment

CANCEL **CONTINUE**

Any queries ? 

If the quotation does not meet the above criteria, we may still be able to help you. Please send your request to ebnewbusiness@metlife.uk.com or talk to one of our team on 0800 917 2111.

For any quotes involving offshore workers, please email ebnewbusiness@metlife.uk.com or call our team on 0800 917 2111

You'll then arrive at the 'Quote Details' page - please fill out the quote details. Once complete, click 'Save and continue'

QUOTE DETAILS **CATEGORIES** **LTA** **MEMBERS** **SUMMARY**

All fields are mandatory

Product Type: Please select [View Product Info](#)

Scheme Name:

Post Code:

Industry Code: Code OR Industry Type 1 Industry Type 2 Industry Type 3 [Refer Company House](#)

Effective Date: DD MM YYYY

Minimum Commission Rate %: Please select Alternate Commission (if any) Please select Please select Please select

Is this scheme closed to new entrants? YES NO

Is this scheme currently insured by an insurer who isn't MetLife? YES NO

New Uninsured Lives YES NO

Number of claims in the last 5 years: Please select

Are there any adverse Medical Underwriting decisions? YES NO

Do any members undertake activities or work offshore (for example working on oil or gas rigs) YES NO

SAVE AND CONTINUE

Product queries: 0080 917 2555 System queries: 0080 917 2006 Open: 9am-5pm Monday-Friday

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Please note: the 'Industry Code' uses the first 3 numbers from the classification on the Companies House website e.g. 82110 – Combined office administration service activities.

Next fill out the Categories, adding a new category for each different type of insured person e.g. all managers, all employees, etc. Once complete, click ‘Save and continue’.

Summary so far

Product Type : Registered
Scheme Name : SEXTON CARS
Commission 0%
[Edit](#)

QUOTE DETAILS > CATEGORIES > LTA > MEMBERS > SUMMARY

Category 1

Category Eligibility ⓘ

Salary Definition ⓘ

Benefit basis for this category OR

Is there a service period before employees are covered under the policy?

Minimum age of members ⓘ

Termination age of members ⓘ

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The next section relates to Long Term Absentees (LTAs) – members who have been absent from work for at least 3 calendar months due to injury or ill-health. Once complete, click ‘Save and continue’.

Summary so far

Product Type : Registered
Scheme Name : SEXTON CARS
Commission 0%
[Edit](#)

Total Number of Categories : 1
Benefit Basis : 2X SALARY
Termination Age : 70
[Edit](#)

QUOTE DETAILS > CATEGORIES > **LTA** > MEMBERS > SUMMARY

Long Term Absentees(LTA)

Are there any Long Term Absentees (LTAs) ?

YES NO ?

Date of Birth	Gender	Reason for Absence	Type of Condition	Date First Absent	Date Returned to Work	
DD MM YYYY	Please Sel...		Please Select	DD MM YYYY	DD MM YYYY	+ ADD

[Back](#) [SAVE AND CONTINUE](#)

[?](#) Product queries: 0080 917 2555 [>](#) System queries: 0080 917 2006 [🌙](#) Open: 9am-5pm Monday-Friday

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If you have LTA's, select 'Yes'; each LTA needs to be added separately.

You will then need to add the membership data.

Step 1: Click 'Download' to download the template. Add your member details in the format that the template asks for and save it to your computer.

Please note: the 'Category number' should be entered in the same order you added to the Categories tab.

The 'Joining date' and 'Leaving date' fields are optional.

Summary so far

Product Type : Registered Total Number of Categories : 1 No LTA
Scheme Name : SEXTON CARS Benefit Basis : 2X SALARY
Commission 0% Termination Age : 70
[Edit](#) [Edit](#) [Edit](#)

QUOTE DETAILS CATEGORIES LTA MEMBERS SUMMARY

Download Template	Upload File	Member Summary
<p>Step 1</p> <p>Download the Member Data template</p> <p>Fill in the Member Data template with details of all members to be covered under the quotation</p> <p>Each member needs to be assigned a category number</p> <p>Gender needs to be typed as either Male, Female or Unknown</p> <p>Date of Birth needs to be given in DD/MM/YYYY format</p> <p>DOWNLOAD</p>	<p>Step 2</p> <p>Upload the Member Data template with details of all members to be covered under the quotation, to a maximum of 199 members</p> <p>The following fields will be uploaded (with optional fields in brackets)</p> <ul style="list-style-type: none">✓ Date of birth✓ Gender✓ Job title✓ Salary✓ Category number✓ Workplace postcode✓ Joining date (optional)✓ Leaving date (optional) <p>FILE UPLOAD</p>	<p>Step 3</p> <p>Please confirm the upload summary of the member data:</p> <p>Total number of members Total Salary Roll : Total Benefit :</p> <p>View uploaded Member Data Download File If you notice an error with the counts, please check your data and re-upload the Member Data template.</p> <p>If you're happy with the summary, please click Confirm & Continue</p> <p>CONFIRM</p>

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Step 2: Upload your file using the 'File Upload' button.

Step 3: Check the summary is correct and click 'Confirm'

You'll then be presented with your Quote Summary. Please check the information is correct – if so, click 'Continue'

Quote Summary

QUOTE DETAILS > CATEGORIES > LTA > MEMBERS > SUMMARY

Please review the summary below. Click 'Edit' if you need to make any changes.

Quote Details Product Type : Registered Scheme Name : SEXTON CARS Commission 0% Edit	Long Term Absentees(LTA) No LTA Edit
Categories Total Number of Categories : 1 Benefit Basis : 2X SALARY Termination Age : 70 Edit	Members Total number of members : 19 Total Salary Roll : £887,995 Total Benefit : £1,375,990 View uploaded Member Data : Download Edit

[CONTINUE](#)

 Product queries: 0080 917 2555  System queries: 0080 917 2006  Open: 9am-5pm Monday-Friday

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A 'Declaration & Data Protection' pop up will appear. Once you've read the information, you will need to confirm both statements and tick the three boxes as shown below. Then click 'Continue'

✕

Declaration & Data Protection

Important information regarding MetLife's group products is included in our Terms and Conditions and Technical Guide, which are found [here](#).

I confirm I will supply a copy of the applicable MetLife Terms and Conditions and Technical Guide to the potential customer with a copy of the quote.

CONFIRM

Data Protection

MetLife is a data controller in respect of any personal data you as the adviser provide us. MetLife's Privacy Notice explains how we may collect, share or process personal data of the customer's employees and their rights and can be accessed here: [privacy notice](#).

As the Adviser, you confirm you are completing this quote form in accordance with the responses given by the potential customer and applicable data protection laws and you have the authority to share the personal data of their members with MetLife.

MetLife may also need to share limited medical information (but not medical reports or other medical evidence) relating to underwriting decisions with you as the Adviser. By continuing this process, you confirm that you have obtained the relevant consent and authority from the potential customer to receive this information.

Should you or the potential customer have any questions or concerns, please contact DataProtectionUK@metlife.com.

I confirm I have read and understand the Data Protection section above.

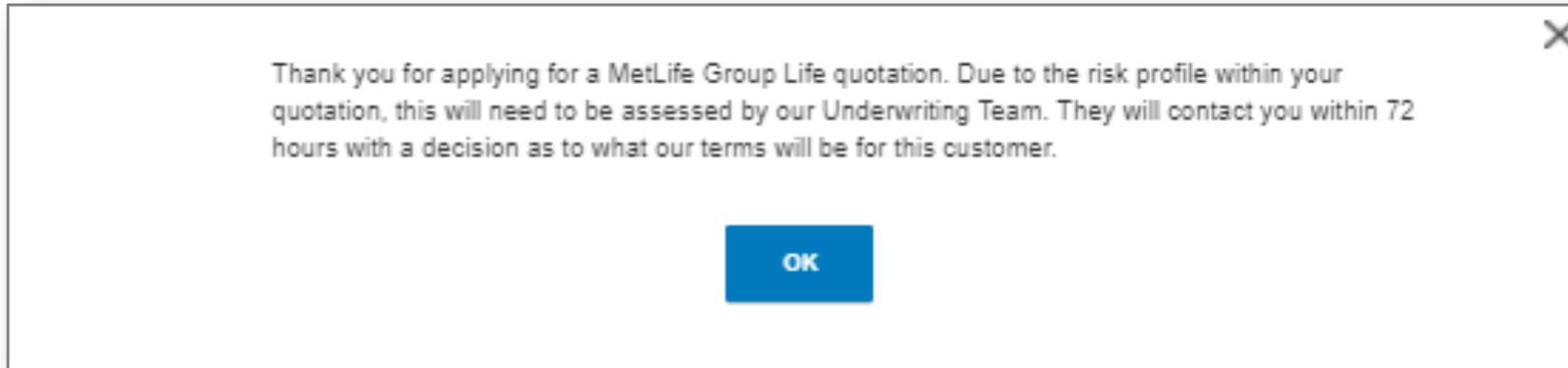
CONFIRM

CANCEL

CONTINUE

Depending on the risk profile of your quote, you will be presented with one of the following two pop ups:

If an underwriting decision is required:



If no underwriting decision is required:



Please note that all quotes can be requoted and viewed on the portal.

You'll receive an email to advise when your quote is ready:

Online Services

Notification of quote ready

Dear Joe,

Thank you for requesting a quote via the online portal.

The quote is now available via the portal <https://uat-qmi.metlife-eservices.com/AdviserHD2>

If you wish to apply for On risk for this quote please use the Apply option in the Online portal.

Yours sincerely,
MetLife Online Services

Note: This is an auto generated email and replies to this email address are not monitored. Please only reply to our Online Services Team at onlineservices@metlife.com

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Navigating life together