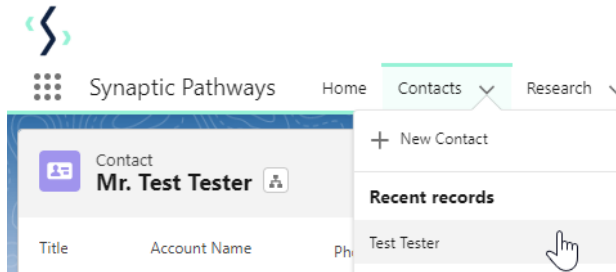


Link to CIExpert from Pathways

Last Modified on 04/04/2023 3:02 pm BST

Log into [Synaptic Pathways](#), find or add a **Client**



Add relevant Client **Details** needed to obtain a Critical Illness quote, such as **Birthdate** and **Sex**

Related	Details	Medical	Holdings
Name	Mr. Test Tester		
Account Name			
Birthdate	01/01/1984		
Occupation	Accounts Administrator/Assistant		
Sex	Male		
Employment Basis	Full-time		
Salary	£40,000		

Under the **Medical** tab, add **Smoker Status**. If you would like to request Partially Underwritten Quotes, complete the **Body Mass Index (BMI)** details

Related	Details	Medical	Holdings
Smoker Status			
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>			
Body Mass Index (BMI)			
<input type="button" value="Metric"/> <input checked="" type="button" value="Imperial"/>			

On the **Related** tab, go to the **Protection** section and click **New**

We found no potential duplicates of this Contact.
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

Attitude To Risk Questionnaires (0) New

Risk Illustrations (0) New

Research (0) New

Income Analysis (0) New

Protection (0) New

Enter a **Protection Name** for the research and click **Save**

New Protection

Information

* Protection Name

* Contact

Description

Cancel Save & New Save

Click on the **Protection Name**

Protection (1) Settings Refresh New
1 item • Updated a few seconds ago

<input type="checkbox"/>	Protection Name	<input checked="" type="checkbox"/>	Created Date
1	<input type="checkbox"/> Critical Illness Comparison	<input checked="" type="checkbox"/> Critical Illness Comparison	04/04/2023, 13:40

[View All](#)

Select the products for quote comparison and click **Add**

Benefit Selection

Select at least one benefit to obtain quotes

- All Benefits
- Business Protection
- Convertible Term Assurance
- Critical Illness Cover
- Decreasing Term
- Family Income Benefit
- Income Protection
- Level Term Assurance
- Whole of Life

Pathways Protection will automatically return quote results based on default settings for the product. From the **Benefit List** on the left hand menu, click the **Edit** button on the product to update quote requirements

Protection
Critical Illness Comparison

[Edit](#) [Delete](#)

Life One: Test Tester
Gender: Male
DoB: 01/01/1984
Age: 39
Smoker: No
Salary: £40,000.00
Occupation: Accounts Administrator/Assistant
Weight: 14st 0lbs
Height: 5ft 6in

Benefit List + Add Benefit

Quick Filter Clear all

Provider: Filter by Providers

Product: Filter by Products

Sort by: Premium

Quote Ref. Number: **97977197**

[Request](#) [CIEPERT](#)

♥ Partially Underwritten Quotes (8)

🛡 Standard Quotes (20)

⚠ Products Declined to Quote (6)

📄 Excluded Quotes (69)

Instant Life Insurance
AIG

Benefit Amount
£100,000.00

Premium Type
Guaranteed

Premium
£6.26

[More Info & Documents](#)

[Apply](#)

HSBC Life Protection
HSBC Life

Benefit Amount
£100,000.00

Premium Type
Guaranteed

Premium
£6.93

[More Info & Documents](#)

[Apply](#)

Life Insurance -
Aviva

Benefit Amount
£100,000.00

Premium Type
Guaranteed

Premium
£7.09

[More Info & Documents](#)

[Apply](#)

Level Term Assurance Results

Driven By: Benefit
Premium Frequency: Monthly
Critical Illness Option: No
Term: 10
Death Benefit Amount: £100,000.00

[Edit/View Benefit](#)

Critical Illness Cover Results

Driven By: Benefit
Premium Frequency: Monthly
Cover Basis: SingleLife1
Term: 10
Critical Benefit Amount: £20,000.00

[Edit/View Benefit](#)

Edit the **Product details** for the Critical Illness cover required and click **Save**

Quote Details

Please enter the following details to obtain the quote

Product Details

Critical Illness Options

Include Critical Illness Cover

Yes No

Critical Illness Benefit Is

Additional Accelerated

*** Cover Type**

Select a value

Comprehensive X

Driven By

Benefit Premium

Premium

Premium Frequency

Monthly Annually

Premium Basis

Guaranteed Reviewable

Length

Term Cease Age

*** Term Length (years)**

Benefit Amount

The results will be updated based on the cover selected. The **CIExpert** button can be seen at the top right of the comparison results screen

Benefit List

[+ Add Benefit](#)

Level Term Assurance [Results](#)

Driven By: **Benefit** Premium Frequency: **Monthly** Critical Illness Option: **Yes**

Term: **20** Death Benefit Amount: **£150,000.00** Critical Benefit Amount: **£150,000.00**

Quick Filter

[Clear all](#)

Provider

Filter by Providers

Product

Filter by Products

Sort by

Premium

Quote Ref. Number: **97977210**

[Request Quote](#) [CIExpert](#)

Partially Underwritten Quotes (14)
Standard Quotes (61)
Products Declined to Quote (13)
Excluded Quotes (53)

	Personal Protection Zurich	Benefit Type Comprehensive + TPD (own occ)	Benefit Amount £150,000.00 Life or CI	Premium Type Guaranteed	Premium £75.97	More Info & Documents	Apply
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[Link to next article](#) [Sending quote results to CIExpert](#)