



Policy Administration: Quick Guide



It's important to us that all of our clients are able to use our website as easily and efficiently as possible. This *Quick guide* is designed to introduce you to our 'Policy Administration Area' and to help you find your way around it. This is the place where you can keep track of all of your referred cases across your Panel Solicitor firms. If you have questions about anything we haven't covered here, don't hesitate to get in touch. We're here to help.

Change View
Select 'Change View' and choose alternative data options to display (Up to a Maximum of 4). The image at the foot of the page illustrates the options available.

Search Criteria
Use the 'Panel Solicitor' search box to track your policies by firm. A number of additional criteria are also available if required. Leave all boxes empty to view all of your policies.

Commence Search
Once you've selected your preferred search criteria (if any), click the 'Search' button to begin. Clicking on 'Search' without selecting any criteria will display all of your policies.

Search Results
The total number of records produced by a search (349 in this example) are shown here.

Cycle Through Search Results
When more than 15 policies have been produced by a specific search, clicking on these arrows will allow you to cycle through them.

Policy List
Up to 15 policies are displayed on screen at one time.

View Policy Details
Click on any of the data elements in the row to view policy details.

Print Results
Print the results of a search.

Export to Excel
Download the results of a search as an Excel spreadsheet.

Policy Administration Area

Actions Menu
View My Policies
Useful Downloads
Log Out

Search **Change View**

Policy no. Client surname Panel Solicitor Referrer ref.
Fee earner email Proceedings Issued Requests between & (DD/MM/YYYY)
Accident type Policy status

Export to Excel Showing results 1 to 15 of 42 < >

Policy number	Client surname	Solicitor ref.	Accident date
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456
<input type="checkbox"/> Mr A Client	aclient@solicitors.co.uk	01/01/2012	123456

Search/Change View Panel

The image to the right shows the 'Change View' panel from the top of the page. Use the two tabs to switch between the 'Search' and 'Change View' panels.

In 'Change View' (seen here), select the data types you'd like to view by ticking the respective boxes alongside each option. Click on the 'Update Columns' bar to update the column headers.

Search **Change View**

<input checked="" type="checkbox"/> Accident date	<input type="checkbox"/> Age of policy	<input type="checkbox"/> Cancellation date	<input type="checkbox"/> Cancellation reason	<input type="checkbox"/> Client address
<input type="checkbox"/> Client DOB	<input type="checkbox"/> Client full name	<input type="checkbox"/> Client postcode	<input checked="" type="checkbox"/> Client surname	<input type="checkbox"/> Defendant full name
<input type="checkbox"/> Fee earner email	<input type="checkbox"/> Insurance status	<input type="checkbox"/> Panel Solicitor	<input type="checkbox"/> On cover date	<input checked="" type="checkbox"/> Policy number
<input type="checkbox"/> Premium	<input type="checkbox"/> Proceedings issued	<input type="checkbox"/> Referral company	<input checked="" type="checkbox"/> Solicitor ref	<input type="checkbox"/> Accident type

Update Columns