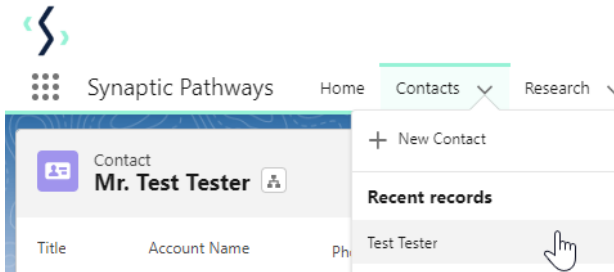


Link to CIExpert from Pathways

Last Modified on 04/04/2023 2:52 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="radio"/> Yes <input checked="" type="radio"/> No		
Body Mass Index (BMI)	<input type="radio"/> Metric <input checked="" type="radio"/> 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 type="checkbox"/>	Created Date
1	Critical Illness Comparison	 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

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

Quick Filter Clear all

Provider: Filter by Providers

Product: Filter by Products

Sort by: Premium

Quote Ref. Number: **97977197**
Request CIEXPERT

♥ Partially Underwritten Quotes (8)
 🛡️ Standard Quotes (20)
 ⚠️ Products Declined to Quote (6)
 i 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

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](#)

Quote Ref. Number: **97977210**

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	<input type="button" value="Apply"/>
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[Link to next article](#) [Sending quote results to CIExpert](#)