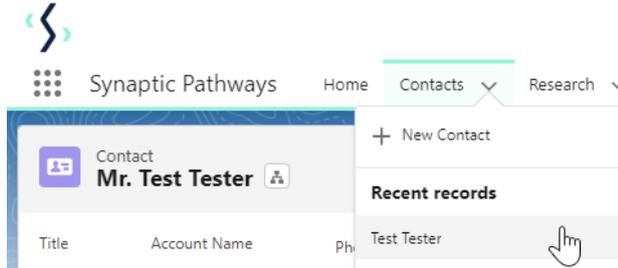


# Link to CIEExpert from Pathways

Last Modified on 13/02/2024 3:36 pm GMT

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			
<a href="#">Accounts Administrator/Assistant</a>			
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
<b>Smoker Status</b>			
<input type="button" value="Yes"/> <input checked="" type="button" value="No"/>			
<b>Body Mass Index (BMI)</b>			
<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 type="checkbox"/>	Created Date
1	<a href="#">Critical Illness Comparison</a>	 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

[Edit/View Benefit](#)

**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)
ℹ️ Excluded Quotes (69)

	<b>Instant Life Insurance</b> AIG	Benefit Amount <b>£100,000.00</b>	Premium Type <b>Guaranteed</b>	Premium <b>£6.26</b>	<a href="#">More Info &amp; Documents</a>	<a href="#">Apply</a>
	<b>HSBC Life Protection</b> HSBC Life	Benefit Amount <b>£100,000.00</b>	Premium Type <b>Guaranteed</b>	Premium <b>£6.93</b>	<a href="#">More Info &amp; Documents</a>	<a href="#">Apply</a>
	<b>Life Insurance -</b> Aviva	Benefit Amount <b>£100,000.00</b>	Premium Type <b>Guaranteed</b>	Premium <b>£7.09</b>	<a href="#">More Info &amp; Documents</a>	<a href="#">Apply</a>

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)

	<b>Personal Protection</b> Zurich	Benefit Type <b>Comprehensive + TPD (own occ)</b>	Benefit Amount <b>£150,000.00 Life or CI</b>	Premium Type <b>Guaranteed</b>	Premium <b>£75.97</b>	<a href="#">More Info &amp; Documents</a>	<input type="button" value="Apply"/>
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[Link to next article](#) [Sending quote results to CIExpert](#)