

A guide to your



PORTAL



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Welcome

In the fast-paced insurance world we understand that we need to offer you an insurer that is easy for you to do business with. So when building the portal we asked you exactly what you wanted and we're developing just that.

The Broker Portal offers you a site that is quick, easy to use and can be personalised to meet the needs of your business.

What are the key features?

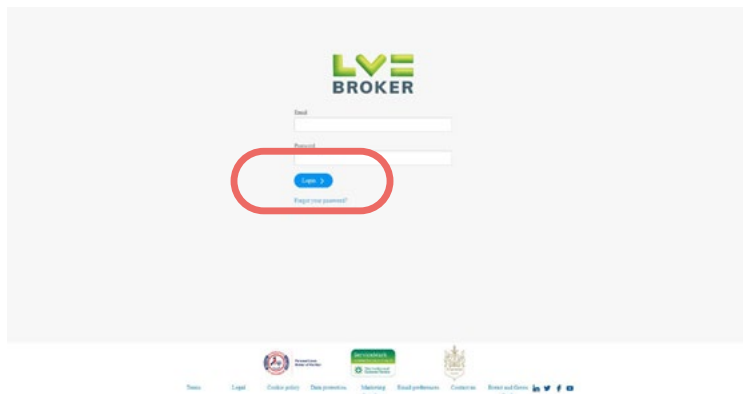
- **Claims updates:** Access a daily claims feed for all motor and home policies
- **Cover Notes:** Create a cover note for any motor policy in minutes
- **Green Cards:** Keep your customer covered whilst abroad for any motor policy
- **Manage users:** Quick and easy set up all from within the Broker Portal
- **NCD letter request:** Enables access to online form with a 24 hour turnaround
- **Access policy docs,** underwriting guides, endorsement lists and more



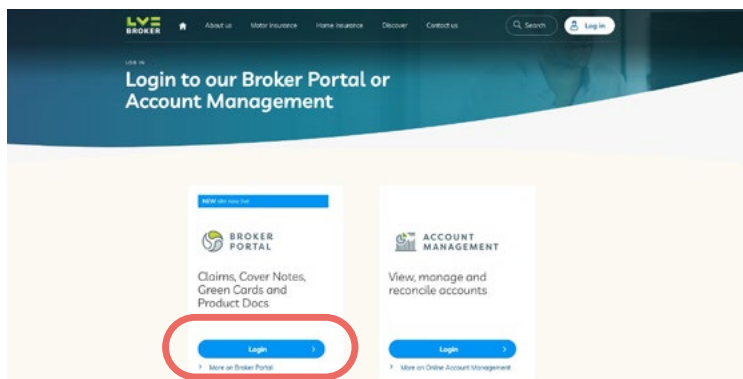
Logging in

1.1 Login to the New LV= Broker Portal here: <https://portal.lvbroker.co.uk/s/login>

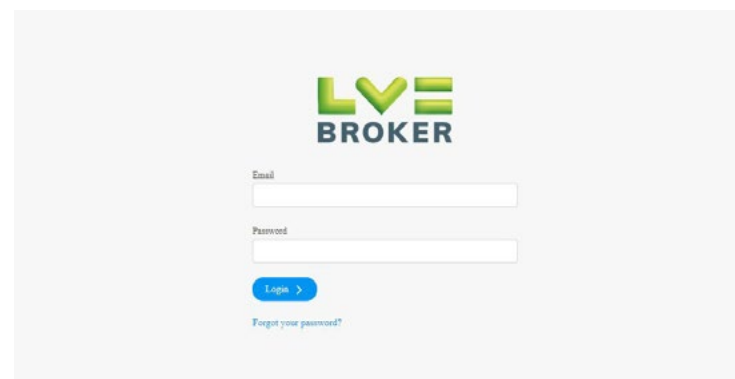
1.2 Click login



1.3 Under the Portal logo click Login



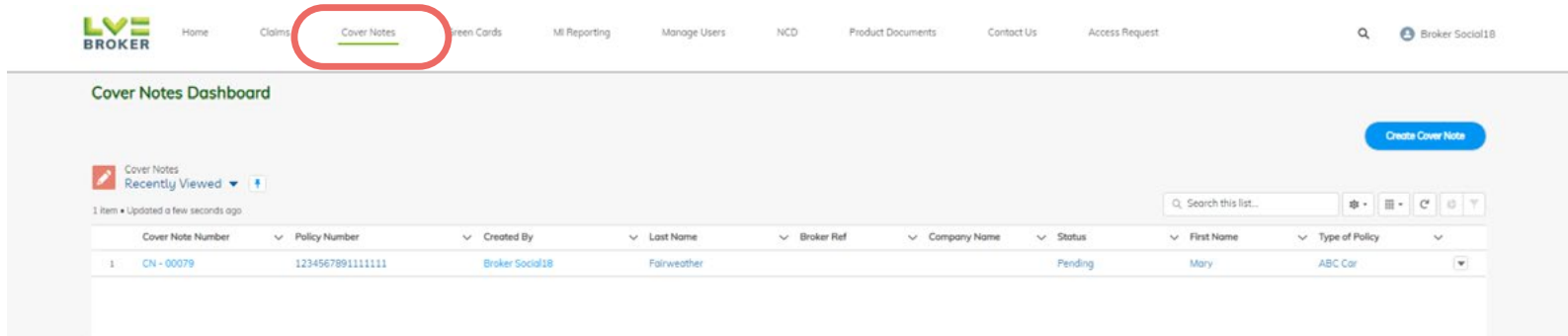
1.4 Enter your email address and the password you have setup



Cover Notes

We recommend using Google Chrome when creating Cover Notes so documents can be downloaded easily

2. Home > Cover Notes



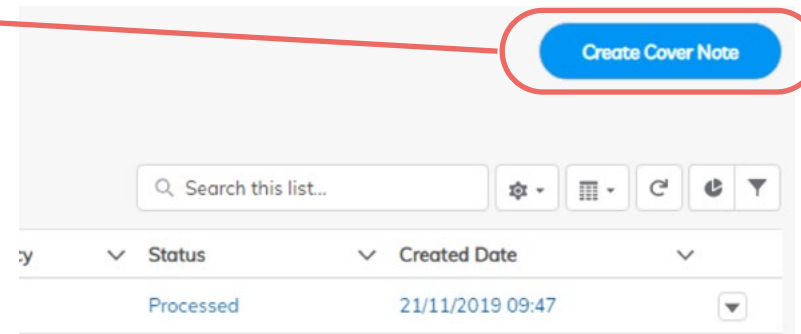
The screenshot shows the LVE BROKER web application interface. The top navigation bar includes links for Home, Claims, Cover Notes (highlighted with a red circle), Green Cards, MI Reporting, Manage Users, NCD, Product Documents, Contact Us, and Access Request. A search bar and a user profile icon labeled 'Broker Social18' are on the right. Below the navigation bar is the 'Cover Notes Dashboard'. It features a 'Create Cover Note' button in the top right corner. On the left, there's a 'Cover Notes Recently Viewed' section with a dropdown arrow and a share icon. Below this, it says '1 item • Updated a few seconds ago'. A table displays the recently viewed cover note with the following data:

	Cover Note Number	Policy Number	Created By	Last Name	Broker Ref	Company Name	Status	First Name	Type of Policy
1	CN - 00079	1234567891111111	Broker Social18	Fairweather			Pending	Mary	ABC Car



Creating a Cover Note

3. From the Cover Note overview screen, click **Create Cover Note**

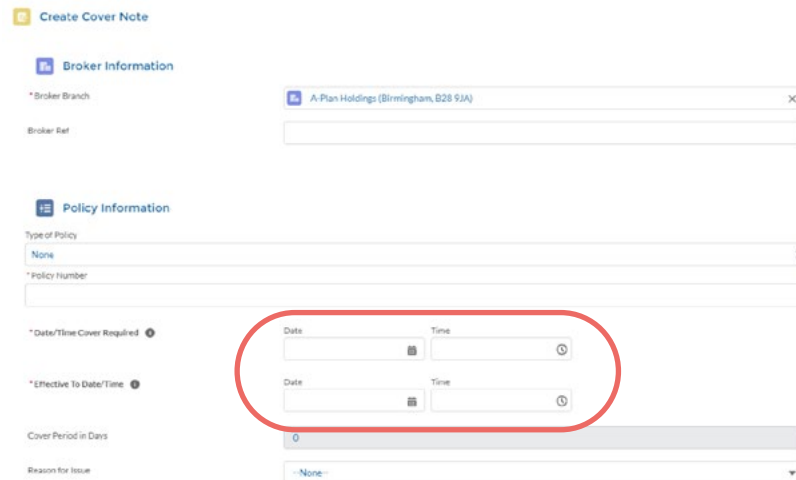


The screenshot shows the 'Create Cover Note' button in the top right corner of the overview screen, highlighted with a red circle. Below the button is a search bar labeled 'Search this list..' and a table with columns for 'Status' and 'Created Date'. The table contains one row with the status 'Processed' and the date '21/11/2019 09:47'.

3.1 **Search for** and **select the Broker Branch** you're writing the Cover Note on behalf of and enter your Broker reference

The following notes relate to specific functionality of the form that may be helpful, rather than a full step by step guide for every field


3.2 **Cover Period:** Completing the Cover Required and Effective To fields will auto-populate the Cover Period in Days



The screenshot shows the 'Create Cover Note' form. The 'Broker Information' section includes a dropdown for 'Broker Branch' (selected: A-Plan Holdings (Birmingham, B26 5JA)) and a text field for 'Broker Ref'. The 'Policy Information' section includes a dropdown for 'Type of Policy' (selected: None), a text field for 'Policy Number', and two date/time pickers: 'Date/Time Cover Required' and 'Effective To Date/Time'. These two date/time pickers are highlighted with a red circle. Below these fields is a 'Cover Period in Days' field (set to 0) and a 'Reason for Issue' dropdown (set to None).



3.3 Vehicle Reg lookup: If a vehicle registration cannot be found, manual fields will appear

 Vehicle Details

Vehicle Registration

Next

Aw, snap! We couldn't find a match for that registration. Please enter the details manually.

Vehicle Type

* Vehicle Make


* Vehicle Model

* Year of Manufacture

* Vehicle CC

* Registration, Chassis or Engine Number

3.4 Persons Entitled to Drive and Adding Driver Excesses: When adding a Driver. Click **Add Driver**, then click the **Pen** icon in the table to open the field for editing. When adding driver excesses, click the **Pen** icon in the table to open the field for editing.


 Persons Entitled to Drive


Persons Entitled to Drive

Add Driver

To enter a driver's name please hover over the cells in the table and click on the pen


First Name	Last Name

 Driver Excesses

Driver	Accident	Fire	Theft	Windscreen
1 All Drivers	250 	250	250	75



3.5 Submitting Cover Note: Once all details are entered click **Submit**


 Premium Information

Gross Premium Incl. IPT


Is This Policy Net Rated? ☐

[Cancel](#) [Submit](#)

3.6 Review Cover Note: After clicking Submit, the page will jump to the top and ask you to review all details to ensure they're accurate.

 Create Cover Note

Please review the inserted data and confirm with 'Submit'

 Broker Information

*Broker Branch Swinton Group Ltd (Manchester, M1 6LT) X

3.7 Amend/Submit Cover Note: To make a change to the Cover Note, click Back. To finalise the Cover Note click the now Green **Submit** button

 Premium Information

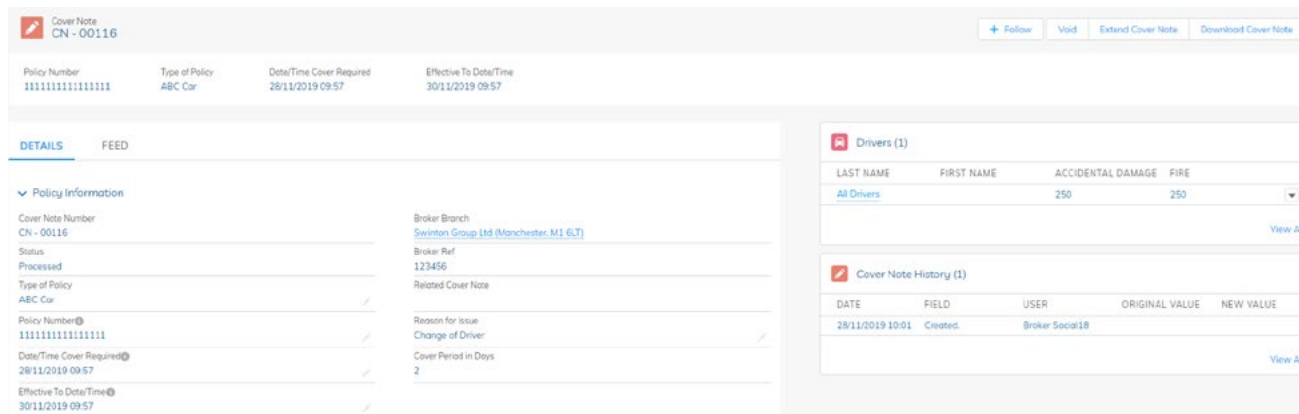
Gross Premium Incl. IPT

Is This Policy Net Rated? ☐

[Back](#) [Submit](#)



3.8 You will now see a summary of the Cover Note you've created



Cover Note
CN - 00116

[+ Follow](#) [Void](#) [Extend Cover Note](#) [Download Cover Note](#)

Policy Number	Type of Policy	Date/Time Cover Required	Effective To Date/Time
11111111111111111111	ABC Car	28/11/2019 09:57	30/11/2019 09:57

DETAILS **FEED**

Policy Information

Cover Note Number	CN - 00116	Broker Branch	Savinton Group Ltd (Manchester, M1 6J7)
Status	Processed	Broker Ref	123456
Type of Policy	ABC Car	Related Cover Note	
Policy Number	11111111111111111111	Reason for Issue	Change of Driver
Date/Time Cover Required	28/11/2019 09:57	Cover Period in Days	2
Effective To Date/Time	30/11/2019 09:57		

Drivers (1)

LAST NAME	FIRST NAME	ACCIDENTAL DAMAGE	FIRE
All Drivers		250	250

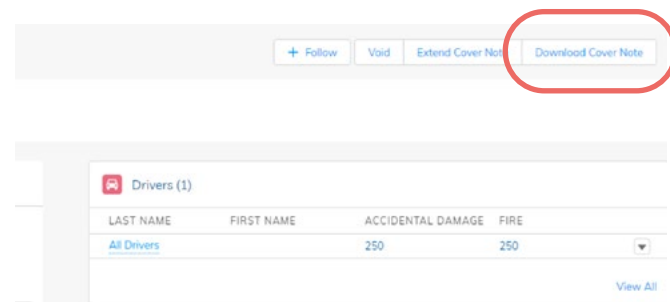
[View All](#)

Cover Note History (1)

DATE	FIELD	USER	ORIGINAL VALUE	NEW VALUE
28/11/2019 10:01	Created	Broker Social18		

[View All](#)

3.9 Download Cover Note: Click **Download Cover Note** in the top right corner of the overview screen



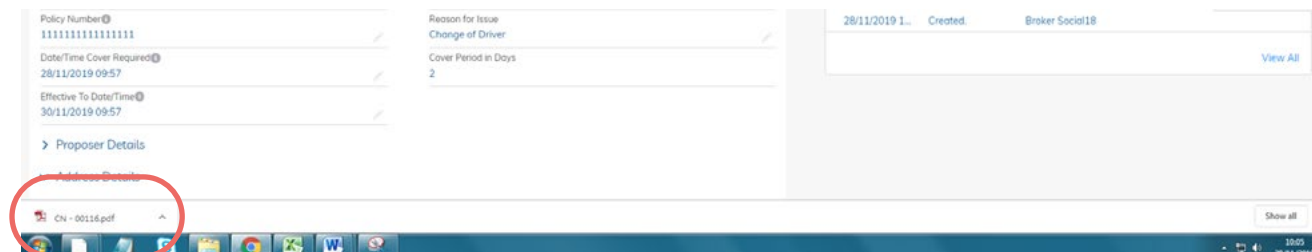
[+ Follow](#) [Void](#) [Extend Cover Note](#) [Download Cover Note](#)

Drivers (1)

LAST NAME	FIRST NAME	ACCIDENTAL DAMAGE	FIRE
All Drivers		250	250

[View All](#)

3.10 Assuming you're using Google Chrome, the Cover Note will **download straight away** and can be found in the **bottom left corner of the browser**



Policy Number: 11111111111111111111

Date/Time Cover Required: 28/11/2019 09:57

Effective To Date/Time: 30/11/2019 09:57

Reason for Issue: Change of Driver

Cover Period in Days: 2

28/11/2019 10:01 Created Broker Social18

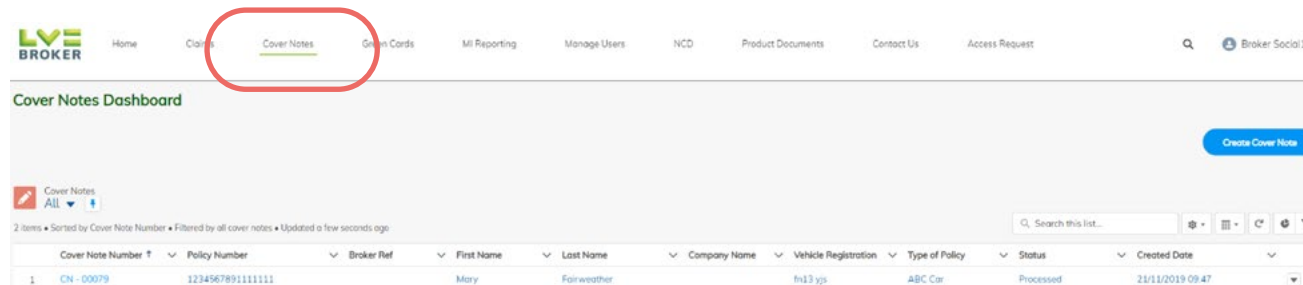
[View All](#)

[CN - 00116.pdf](#)

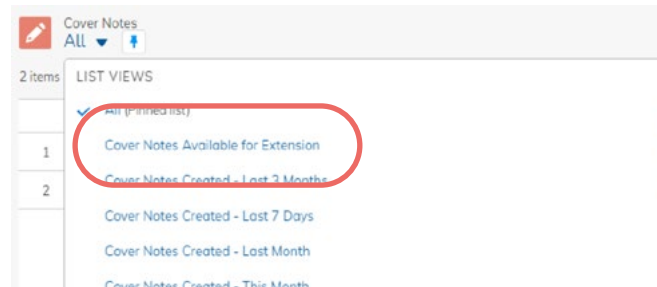


Cover Note Extensions

3.11 Click **Cover Notes** to access the Cover Note Overview table

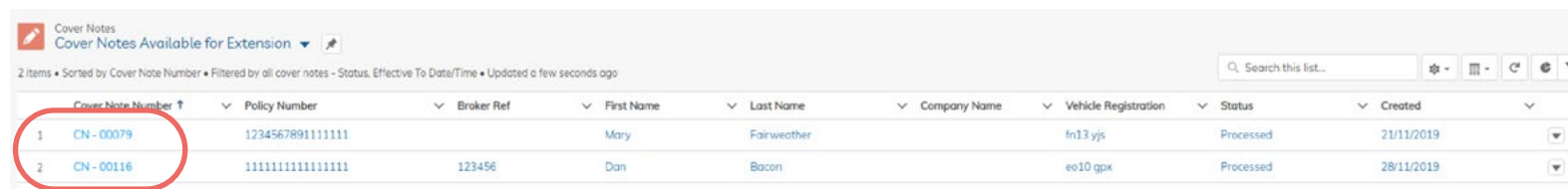


3.12 To view all Cover Notes available for extension, click the down arrow next to your current View and click **Cover Notes Available for Extension**

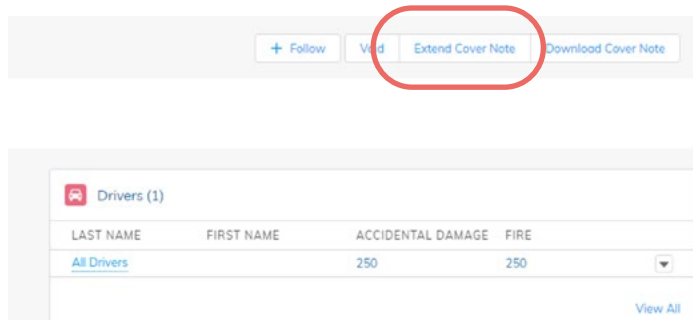


3.13 Your View will now show you only the **Cover Notes Available for Extension**

3.14 Click the **CN - ##### reference** to open the Cover Note details screen

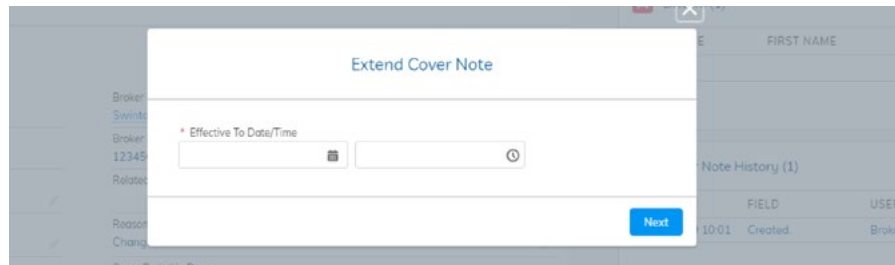


3.15 In the top right corner, click **Extend Cover Note**

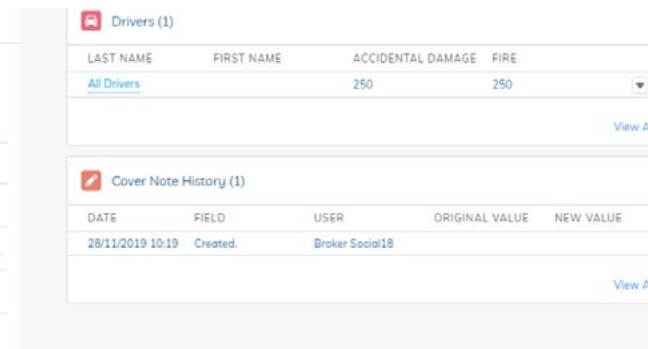
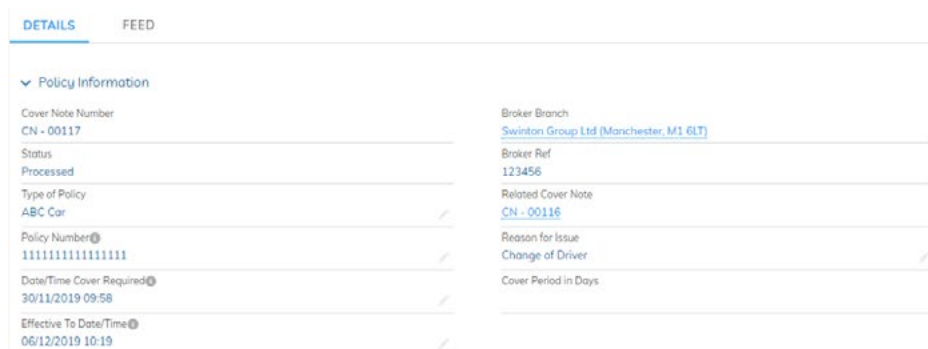


3.16 Enter the new **Effective To Date/Time** and click **Next**

3.16.1 The new Effective From Date/Time will be automatically populated with the previous Cover Note's Effective To Date/Time plus 1 minute

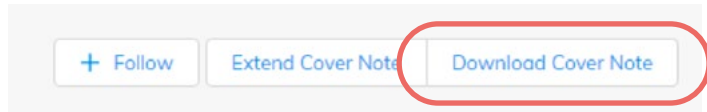


3.17 You will now see the new extended Cover Note details page



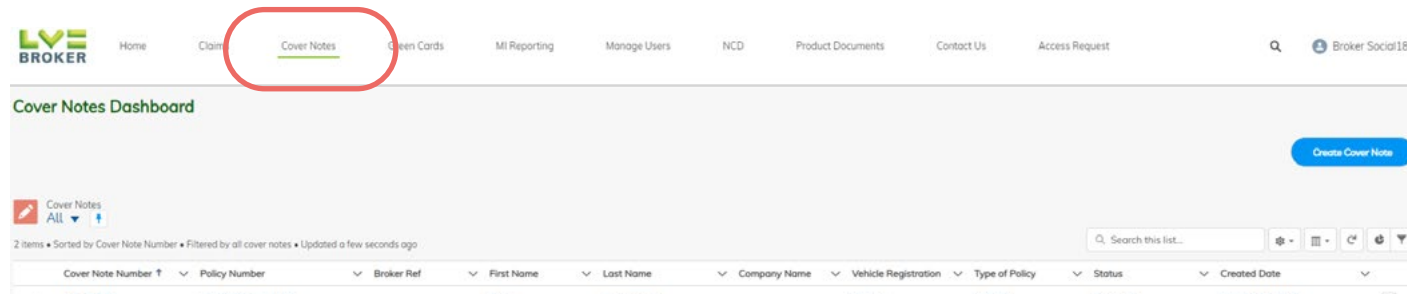
3.18 Click **Download Cover Note**

Assuming you're using Google Chrome, the Cover Note will **download straight away** and can be found in the **bottom left corner** of the Browser

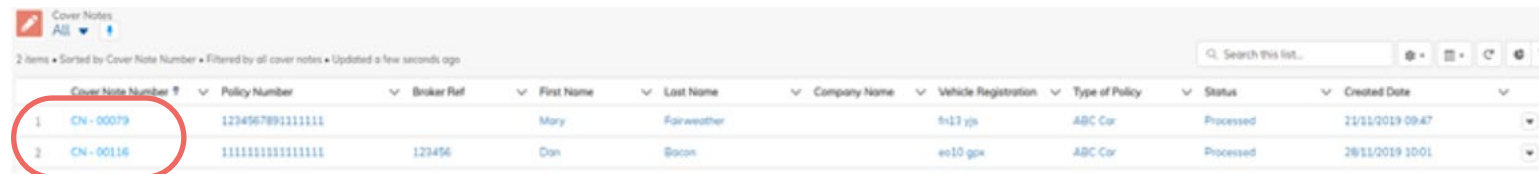


Voiding a Cover Note

3.19 Click **Cover Notes** to access the Cover Note Overview table

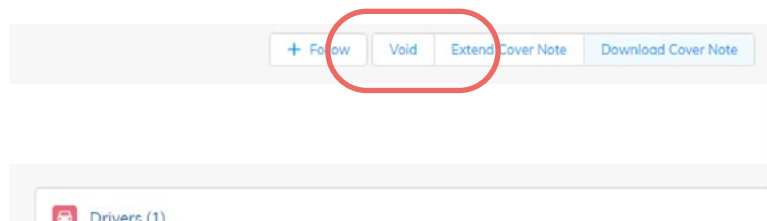


3.20 Click the **CN - ##### reference** to open the Cover Note details screen of the Cover Note you wish to Void

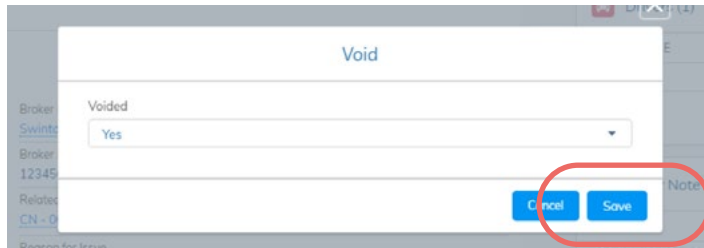


	Cover Note Number	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1	CN - 00079	123456789111111		Mary	Farweather		h13 yjs	ABC Car	Processed	21/11/2019 09:47
2	CN - 00116	111111111111111	123456	Don	Bacon		eo10 gpx	ABC Car	Processed	28/11/2019 10:01

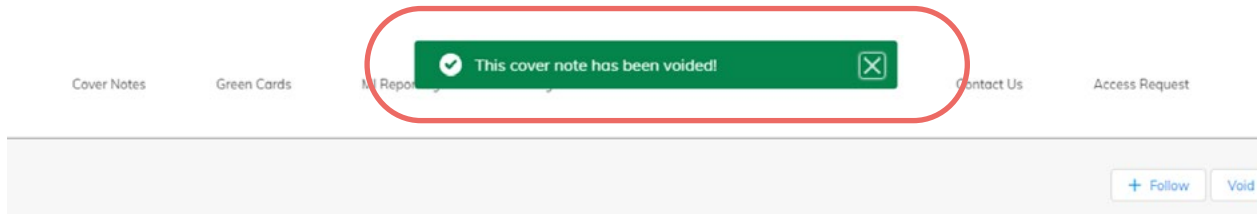
3.21 Click **Void**



3.22 Select Voided **Yes** in the dropdown and click **Save**



3.23 The Cover Note will now be **Voided** and a confirmation message will show



3.24 The Cover Note **Status** will now show as **Void**

Cover Notes

3 items • Sorted by Cover Note Number • Filtered by all cover notes • Updated a few seconds ago

Search this list...

	Cover Note Number ↑	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1	CN - 00079	1234567891111111		Mary	Fairweather		fn13 yjs	ABC Car	Processed	21/11/2019 09:47
2	CN - 00116	1111111111111111	123456	Dan	Bacon		eo10 gpx	ABC Car	Processed	28/11/2019 10:01
3	CN - 00117	1111111111111111	123456	Dan	Bacon		eo10 gpx	ABC Car	Void	28/11/2019 10:19



Searching for a Cover Note

3.25 To Search for a Cover Note, enter your search in the box provided and hit **Enter**

3.25.1 Note: Search will search on all columns of information except Status and Created Date. Please use the **View filters** function for this type of search.

3.25.2 Note: Search will work only where the result string is unbroken. Here are some examples of searches that do/do not work

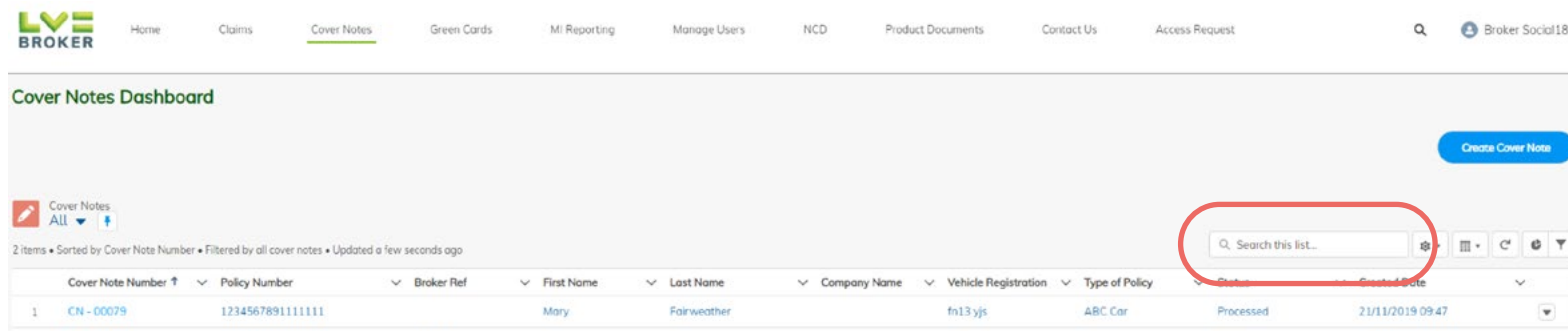
3.25.2.1 CN – 00098 = will work

3.25.2.2 00098 = will work

3.25.2.3 098 = won't work

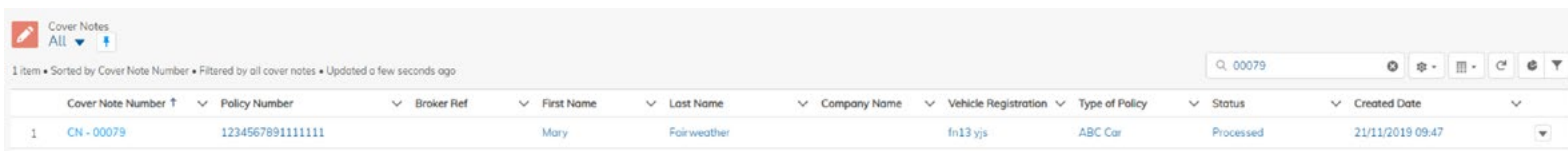
3.25.2.4 7214256894 = will work

3.25.2.5 721 = won't work



The screenshot shows the LVE BROKER Cover Notes Dashboard. The search bar is highlighted with a red circle. The dashboard includes a navigation bar with links to Home, Claims, Cover Notes, Green Cards, MI Reporting, Manage Users, NCD, Product Documents, Contact Us, and Access Request. The main content area shows a table of cover notes with columns: Cover Note Number, Policy Number, Broker Ref, First Name, Last Name, Company Name, Vehicle Registration, Type of Policy, Status, and Created Date. A search bar is located at the top right of the table, and a 'Create Cover Note' button is at the top right of the dashboard.

3.26 Your search results will now be displayed



The screenshot shows the LVE BROKER Cover Notes Dashboard with search results for '00079'. The search bar now contains '00079'. The table displays one result with the following details:

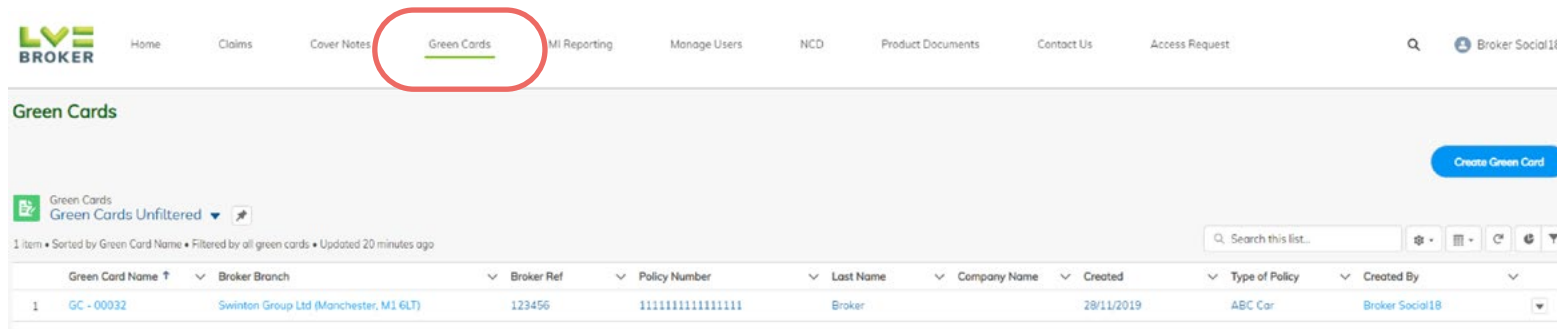
Cover Note Number	Policy Number	Broker Ref	First Name	Last Name	Company Name	Vehicle Registration	Type of Policy	Status	Created Date
1 CN - 00079	1234567891111111		Mary	Fairweather		fn13 yjs	ABC Car	Processed	21/11/2019 09:47



Green Cards

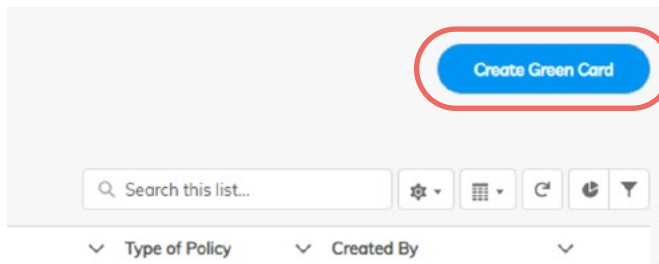
Creating a Green Card

4. Go to Home > **Green Cards**



The screenshot shows the LVE BROKER portal interface. The top navigation bar includes links for Home, Claims, Cover Notes, **Green Cards** (highlighted with a red circle), MI Reporting, Manage Users, NCD, Product Documents, Contact Us, and Access Request. Below the navigation bar, the 'Green Cards' section is displayed. It features a 'Create Green Card' button in the top right corner. A table lists existing green cards with columns: Green Card Name, Broker Branch, Broker Ref, Policy Number, Last Name, Company Name, Created, Type of Policy, and Created By. The table contains one entry: GC - 00032, Swinton Group Ltd (Manchester, M1 6LT), 123456, 111111111111111111, Broker, 28/11/2019, ABC Car, and Broker Social18.

4.1 From the Green Card overview screen click **Create Green Card**



The screenshot shows a close-up of the 'Create Green Card' button, which is highlighted with a red circle. Below the button is a search bar labeled 'Search this list...' and several filter icons (gear, list, refresh, and funnel). At the bottom, there are dropdown menus for 'Type of Policy' and 'Created By'.

4.2 Search for and select the Branch you're writing the Green Card on behalf of




The screenshot shows the 'Create Green Card' form. The 'Broker Information' section is highlighted with a red circle. It contains a 'Broker Branch' field with a dropdown menu showing 'Swinton Group Ltd (Manchester, M1 6LT)'. Below it is a 'Broker Ref' field.

The following notes relate to specific functionality of the form, this is not a step by step guide for every field



4.3 **Cover Period:** Completing the Cover Required and Effective To fields will auto-populate the Cover Period in Days

 **Policy Information**

Type of Policy
None


* Policy Number

* Date Cover Required ⓘ 28-Nov-2019

* Policy Expiry Date ⓘ

Cover Period in Days 0


4.4 **Vehicle Category:** The vehicle category chosen will drive the vehicle category printed on the Green Card

 **Vehicle Details**

* Green Card Vehicle Category Car

Vehicle Registration

Will you be towing a Caravan or Trailer?

 **Named Drivers**

Any person insured to drive this vehicle abroad must be named

Add named driver(s) other than Proposer

--None--

✓ Car

Van

Motorcycle

Motorhome

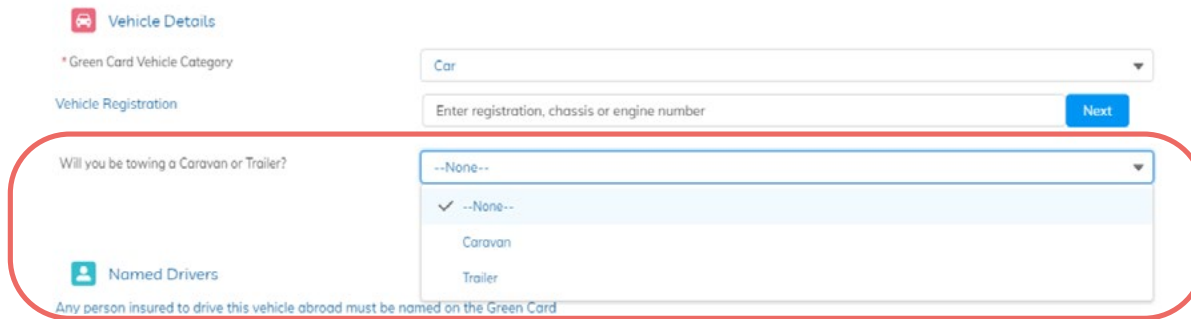
Caravan

Trailer

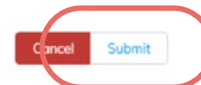
Lorry or Tractor



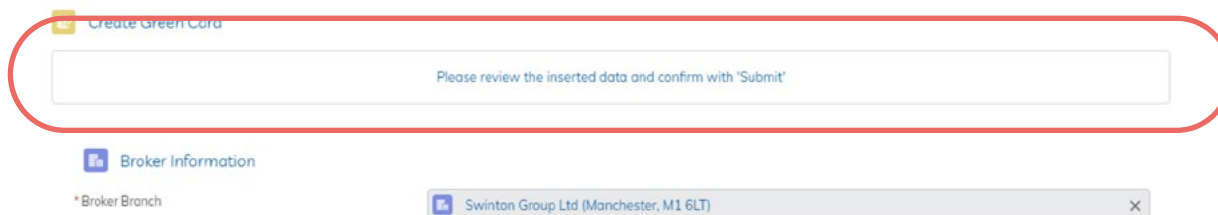
4.5 Will you be towing a Caravan or a Trailer? If this option is selected, a second Green Card will be produced with the appropriate details using the details entered in this section of the form.




4.6 Once all details are entered click **Submit**

4.7 Review Green Card: After clicking Submit, the page will jump to the top and ask you to review all details to ensure they're accurate.

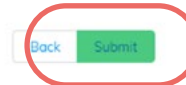



4.8 Amend/Submit Cover Note: To make a change to the Green Card, click Back.
To finalise the Green Card click the now Green **Submit** button

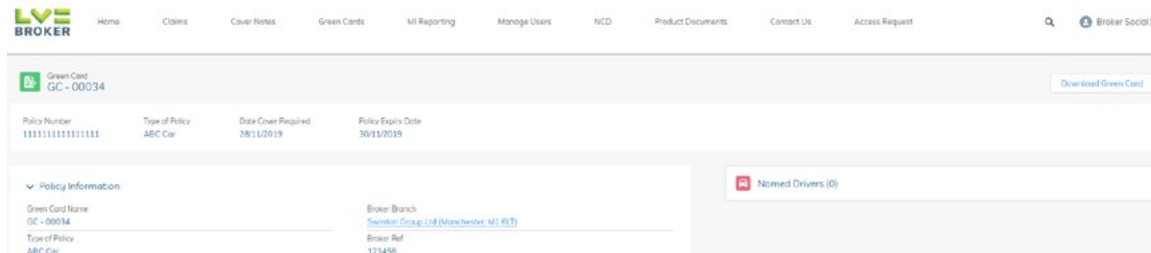
 **Named Drivers**

Any person insured to drive this vehicle abroad must be named on the Green Card

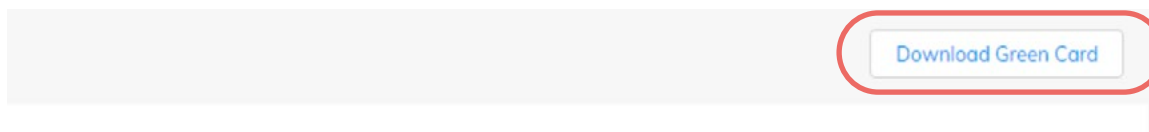
Add named driver(s) other than Proposer ☐



4.9 You will now see a summary of the Green Card you've created



4.10 Download Green Card: Click **Download Green Card** in the top right corner of the overview screen



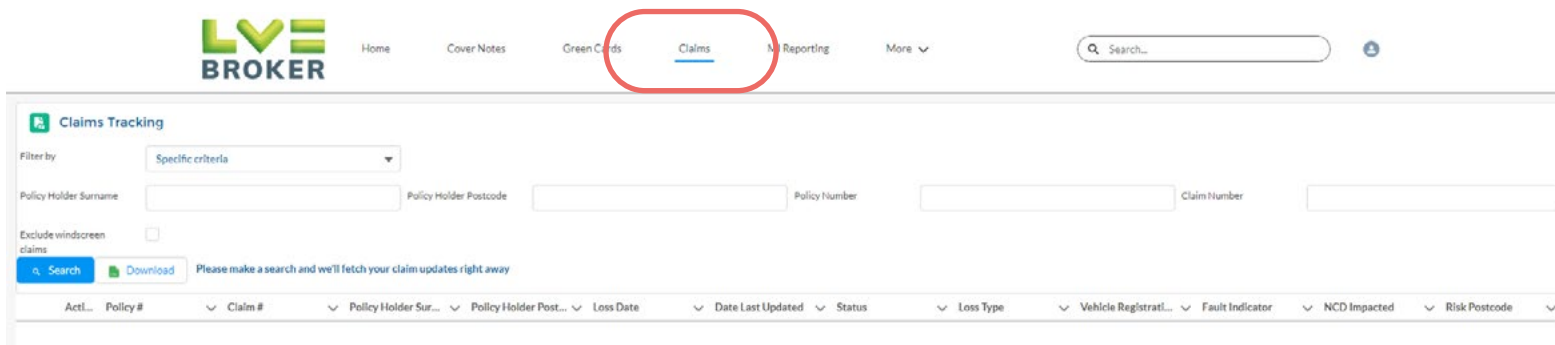
4.11 Assuming you're using Google Chrome, the Green Card will **download straight away** and can be found in the **bottom left corner of the browser**



Claims Tracking

Viewing your claims

5. Go to Home > **Claims**



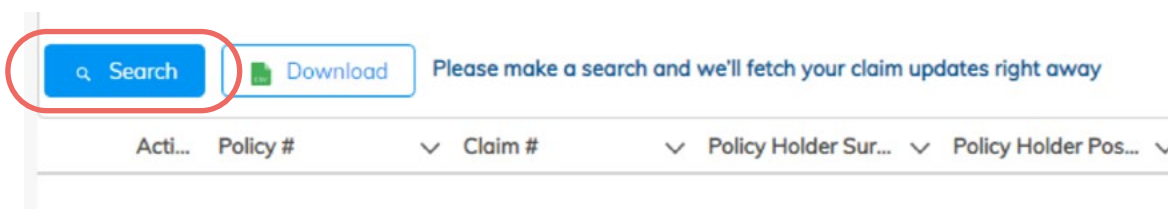
The screenshot shows the LVE BROKER portal interface. In the top navigation bar, the 'Claims' menu item is highlighted with a red circle. Below the navigation bar, the 'Claims Tracking' section is displayed. It includes a 'Filter by' dropdown menu set to 'Specific criteria'. There are input fields for 'Policy Holder Surname', 'Policy Holder Postcode', 'Policy Number', and 'Claim Number'. A checkbox for 'Exclude windscreen claims' is present. A blue 'Search' button is highlighted with a red circle. Below the search fields, there is a message: 'Please make a search and we'll fetch your claim updates right away'. At the bottom, there is a table header with columns: 'Acti...', 'Policy #', 'Claim #', 'Policy Holder Sur...', 'Policy Holder Post...', 'Loss Date', 'Date Last Updated', 'Status', 'Loss Type', 'Vehicle Registrat...', 'Fault Indicator', 'NCD Impacted', and 'Risk Postcode'.

5.1 Find your claims by using one of the search fields – you'll need to search the full criteria
e.g. a full policy number not just 800



This is a close-up view of the 'Claims Tracking' search interface. It shows the 'Filter by' dropdown menu set to 'Specific criteria'. Below it are four input fields: 'Policy Holder Surname', 'Policy Holder Postcode', 'Policy Number', and 'Claim Number'. There is also a checkbox for 'Exclude windscreen claims'.

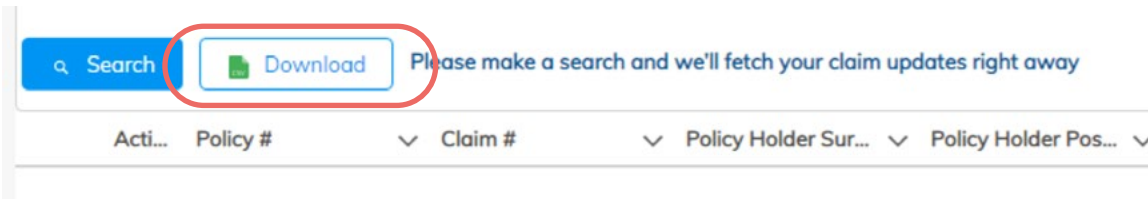
5.2 Click **Search** to populate your claims



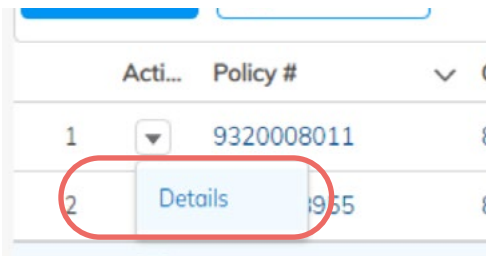
This is a close-up view of the 'Search' and 'Download' buttons. The 'Search' button is highlighted with a red circle. Below the buttons is a message: 'Please make a search and we'll fetch your claim updates right away'. At the bottom, there is a table header with columns: 'Acti...', 'Policy #', 'Claim #', 'Policy Holder Sur...', and 'Policy Holder Pos...'.



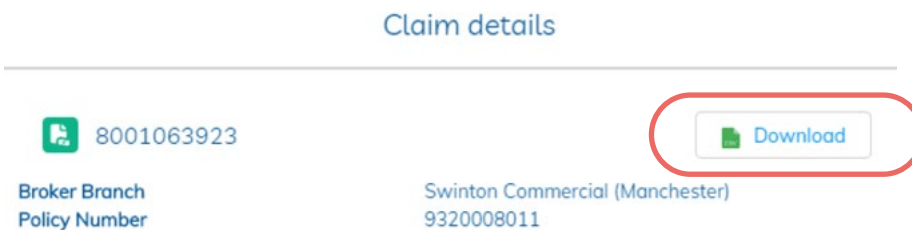
5.3 You'll then be able to download all of the claims from your search by clicking **Download**



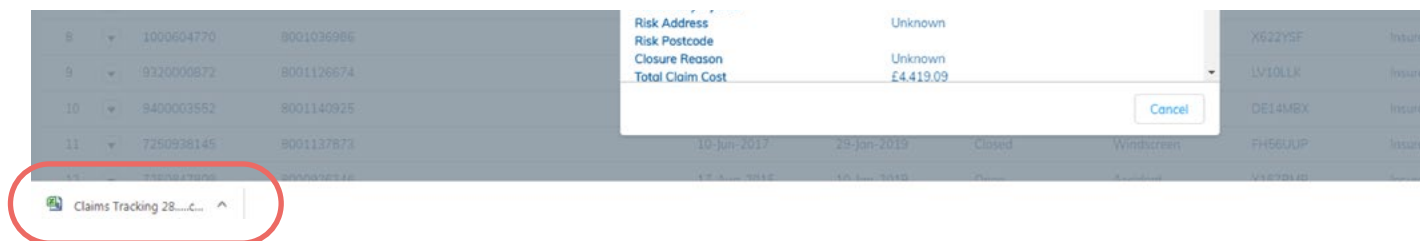
5.4 To download a single claim, find the claim then select the drop down under **Action** and select **Details**



5.5 This will bring up the full claims details – to download select the **Download** button



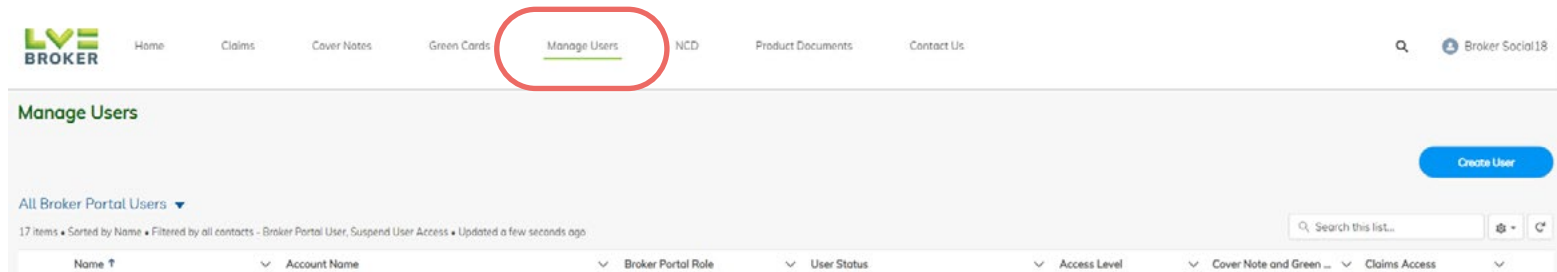
5.6 Assuming you're using Google Chrome, the Claims Report will **download straight away** and can be found in the **bottom left corner** of the browser



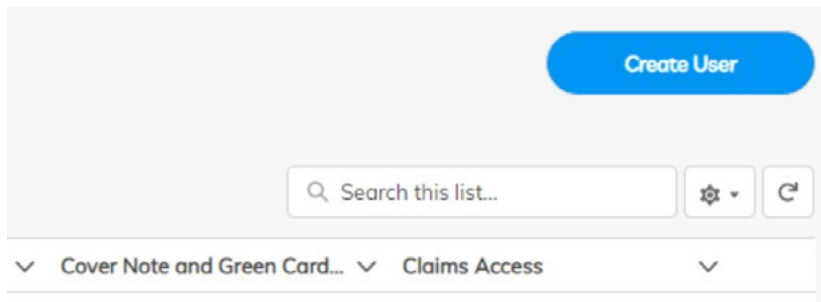
Manage Users

Viewing your claims

6 Go to Home > **Manage Users**

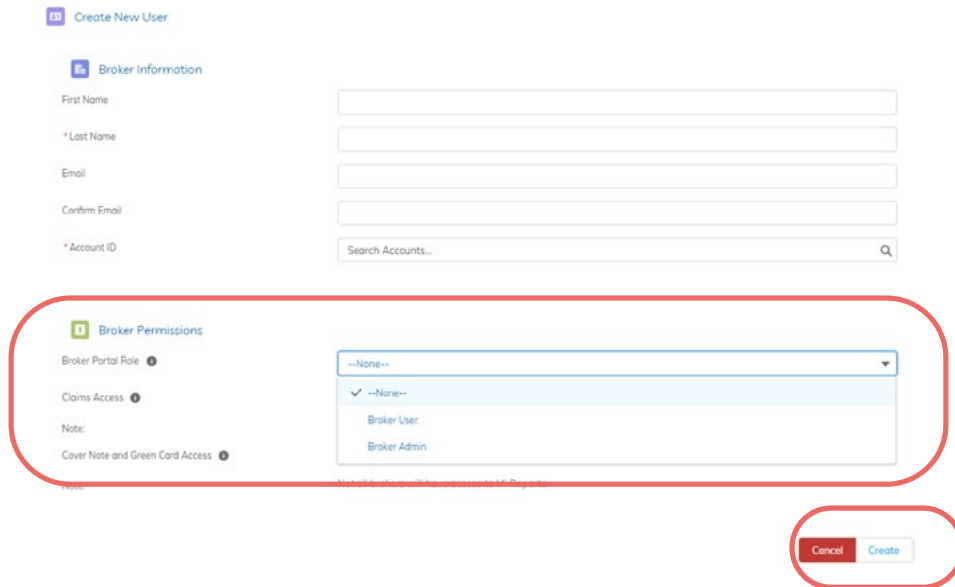


6.1 To set up a new user click **Create User**



Broker User – Basic access for policy docs and NCD requests

Broker Admin – Same as a Broker User, but can manage users too



Cover Note and Green Card Access:

- **Totally self-serve**
- **Keep your customers covered whilst abroad with our Green Cards**

Claims Access:

- **New repair tracking now available for all motor claims**
- **New daily claims feed**

6.2 Follow the steps through

6.2.1 You'll need to select whether the user is a Broker User or Broker Admin:



6.3 Once happy then click **Create**. It will then ask you to review after which you can click **Submit**

Email

Confirm Email

* Account ID

Broker Permissions

Broker Portal Role

Claims Access ☒

Note: Just so you know, when adding Claims access it may take 15 mins to show updates whilst some clever stuff happens.

Cover Note and Green Card Access ☒

Note: Not all brokers will have access to MI Reports

[Back](#) [Submit](#)

6.4 – You'll then see a summary screen of the user

Manage Users

Broker Summary

Contact **Fletcher Bacon** [+ Follow](#) [Edit](#) [Send \(Re\)activation Link](#)

Title	Account Name	Phone	Email	Contact Owner
	Swinton Group Ltd (Manchester, M1 6LT)		fletcher@swinton.co.uk	Broker Social...

Name [Fletcher Bacon](#)

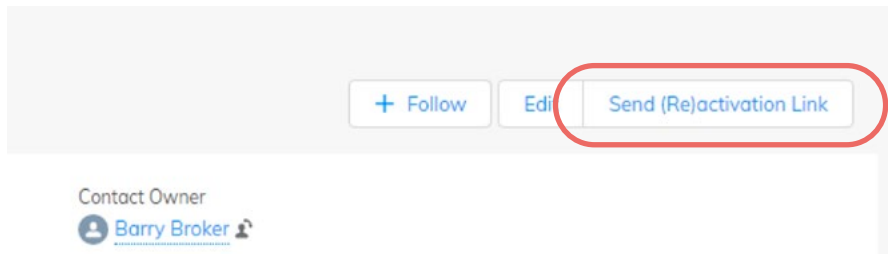
Account Name [Swinton Group Ltd \(Manchester, M1 6LT\)](#)

Email fletcher@swinton.co.uk

✓ User and Permission Information

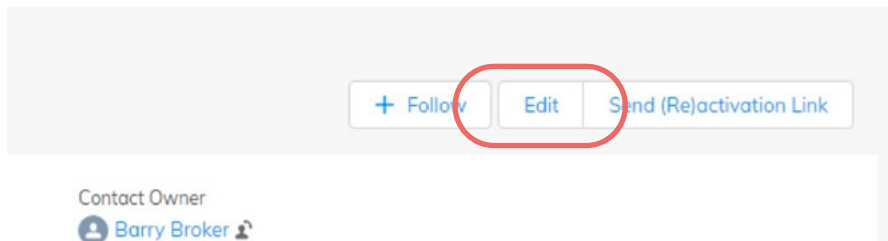


6.5 – If the user hasn't received their activation email then you can re-send it to them by clicking **Send (Re)activation Link**

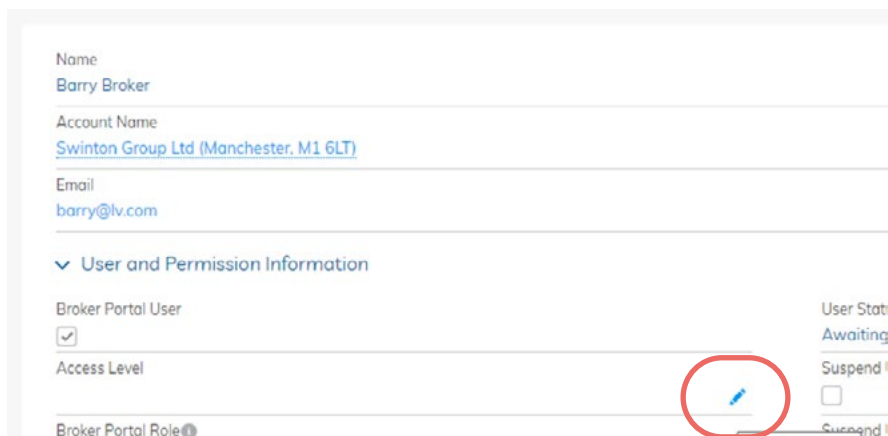


6.6 There are 2 ways to edit a user:

6.6.1 You can click the edit button next to the reactivation link when in the user summary page



6.6.2 Or you can click the pencil icon in any of the fields shown below



A screenshot of the user profile form for 'Barry Broker'. The form has several fields: 'Name' (Barry Broker), 'Account Name' (Swinton Group Ltd (Manchester, M1 6LT)), and 'Email' (barry@lv.com). Below these is a section titled 'User and Permission Information'. In this section, there is a 'Broker Portal User' checkbox (checked), an 'Access Level' dropdown menu, and a 'Broker Portal Role' dropdown menu. A pencil icon is visible in the 'Access Level' dropdown menu, which is circled in red. To the right of the 'Access Level' dropdown, there is a 'User Status' section with 'Awaiting' and 'Suspend' options.




6.6.3 In the edit contact screen, you can edit a user's access levels, what they can access as well as suspending their access – see next step

User and Permission Information

Broker Portal User
☒

Access Level
--None--

*Broker Portal Role ⓘ
Broker User

Cover Note and Green Card Access ⓘ


User Status
Awaiting TOU Acceptance

Suspend User Access ⓘ
☐

Suspend User Access until

6.7 You can also suspend a user's access in the summary page by clicking the pencil next to **Suspend User Access**

User Status
Awaiting TOU Acceptance

Suspend User Access
☐


Suspend User Access until

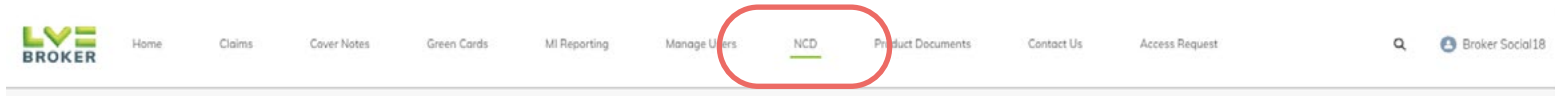




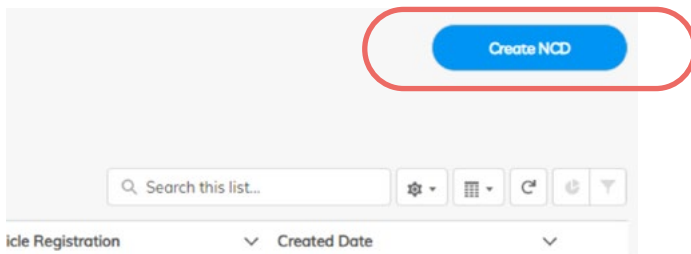
NCD

Request No Claims Discount

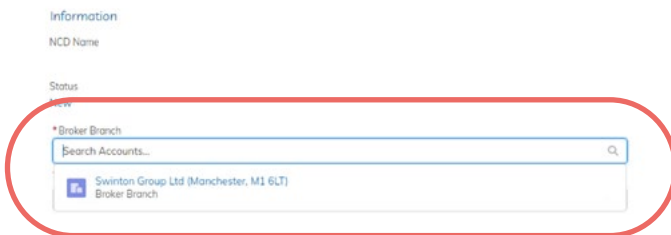
7 Go to Home > **NCD**



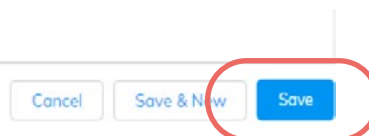
7.1 From the NCD overview screen click **Create NCD**



7.2 **Search for** and **select the Broker Branch**



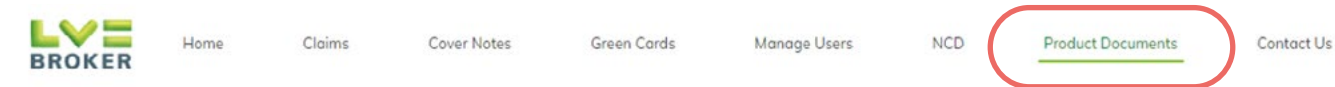
7.3 Fill in the details and click **Save**



Product Documents

Ordering Stationery

8 Go to Home > **Product Documents**

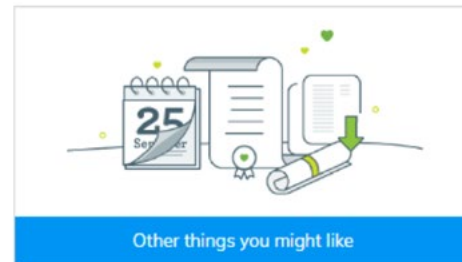
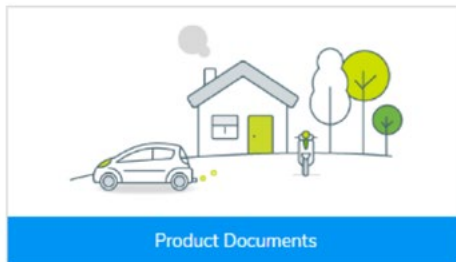


Product Documents

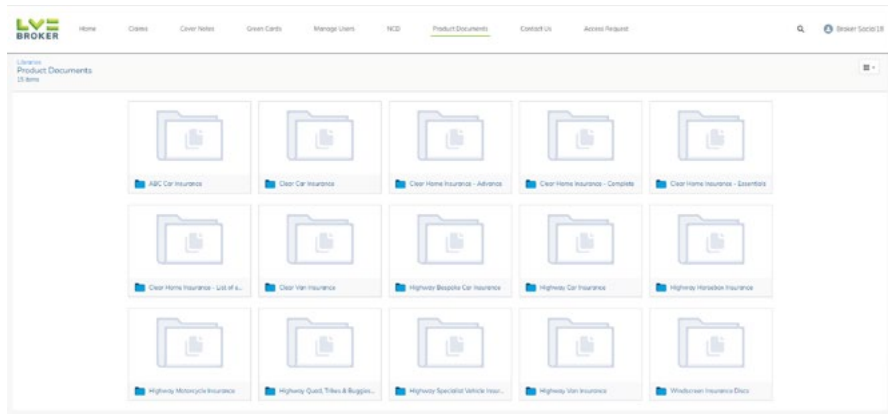
Welcome to your Product Documents area.

Here you can view and download PDF copies of our product documents.
Just select the correct document and click 'Download' - it's as easy as that!

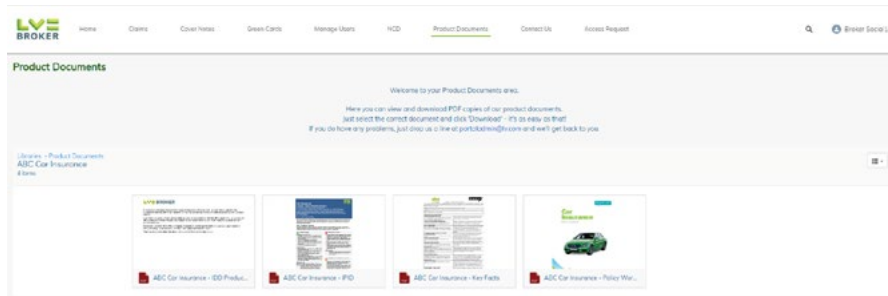
8.1 Select the area you'd like to view



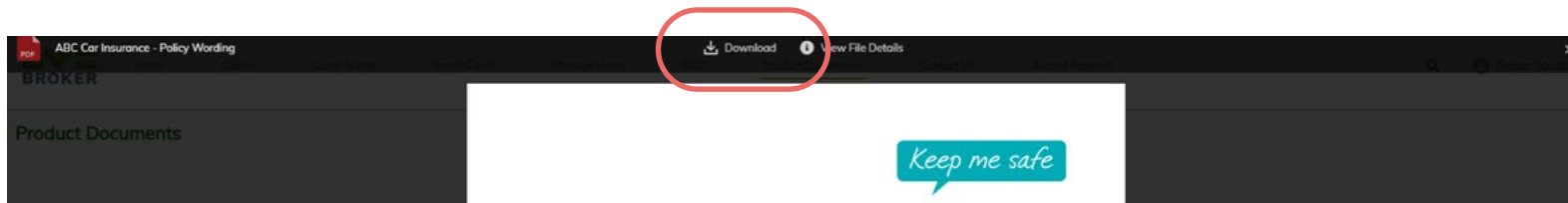
8.2 In **Product Documents** select the product you require



8.3 Click on the document you require to bring up a preview



8.4 **Download** the document using the panel at the top of the screen



8.5 Should you require **hard copies** then you'll find a link at the bottom of the page



Should your customer require a hard copy of a policy wording please click here to fill out the order request form.

8.6 Enter the amount of copies you require and click **Next**

Printed Product Documents Order

We passionately believe you can help us save millions of sheets of paper by simply promoting electronic documents with your customers. They're quick to send, quick to search and far greener for the environment.

If e-Docs are do not meet your customer needs however, please enter the print quantity required and submit your order justification when prompted. Please note that your order justification needs to validate exactly why you need hard copies instead of simply using the greener choice of e-Docs.

Orders will be reviewed within 2 working days and you'll receive an email notification when complete.

For any queries please contact portaladmin@lv.com

Name: Broker Social18

Account: Swinton Group Ltd (Manchester, M1 6LT)

Address: 2nd Floor, , M1 6LT, United Kingdom, Bridgewater House, 58-60 Whitworth Street

Printed documents will only be sent to the address shown here.

If this is incorrect please email lvbrokeragency@lv.com to update our records before placing your order.

Name	Reference	Quantity	Limit
Available for print		<input type="text" value="0"/>	20

NEW top level folder

Other things you might like

Name	Reference	Quantity	Limit
Desk Calendar - Please click the link at the bottom of this page to order	24939-2018	<input type="text" value="0"/>	5
Desk Calendar - Please click the link at the bottom of this page to order	24939-2018	<input type="text" value="0"/>	5
Wall Planner - Please click the link at the bottom of this page to order	2019	<input type="text" value="0"/>	5
Wall Planner - Please click the link at the bottom of this page to order	2019	<input type="text" value="0"/>	5

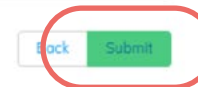


8.7 A box will appear asking you to enter your rationale for the order – once this has been filled in click **Submit**

Don't forget you have a range of ways to access documents instead of ordering hard copies. Together we can save millions of sheets of paper by choosing electronic documents through the e-Docs store.

Still need to order hard copies?
You'll need to justify why you need the hard copies for each product. Where there is a genuine need we will of course look to approve your request, however justifications such as 'we always give a hard copy' will be declined.

Please enter your order rationale below:



8.8 A copy of your order will be displayed on the screen

The screenshot shows a web browser window with the LVE Broker Portal. A green success message at the top states: "Success: Thanks for placing your print order request. Orders will be reviewed within 2 working days and docs sent out shortly after (assuming everything's OK of course)." Below this, the "Print Request P-0005" is displayed. It includes a table for "Print Request Lines (1)" with columns for "PRINT REQUEST LINE NAME", "REFERENCE", and "QUANTITY". The table shows one line item: "Highway (Qual. Title & Buggy Policy Insurance - Pol. 21489-2018)" with a quantity of "5". To the right, there is a section for "Print Request Name P-0005" with fields for "Order Rationale" (containing "Test order") and "Order" (containing "London Social"). Below this is "System Information" showing "Created By: London Social" and "Created On: 29/11/2019 12:38". At the bottom right, it says "Last Modified By: London Social" and "Last Modified On: 29/11/2019 12:38". The footer contains various logos, including "LVE BROKER", "Service Made", and "The Liverpool Victoria Insurance Company", along with copyright information: "© 2019 Liverpool Victoria Insurance Company Limited. BHS 2NF, UK".

