

My Resolution Life

Add new Child Trauma

How to Guide

Resolution Life

Add new Child Trauma

- If an existing customer with Resolution Life would like to add new child trauma to their insurance cover, there are **two** requirements:

1. The completion of the [Child trauma option personal statement form](#) .
2. The parent's new business quote.

- Currently you may only quote a Child Trauma option via the My Resolution Life portal. The Child Trauma Option Personal Statement form is only available as a paper form.

- You will find this form under **Documents and Forms** in portal.

Find a Resolution Life Form

If you wish to find a form related to a specific customer please use the customer search function below to go into their profile.
This could be quicker:

Customer search

Alternatively, to search across all forms, please enter a keyword below:

Q child

Search Form

- Make sure you select the **Childrens trauma option Personal Statement Application form** as shown below.

Form Type	Name and description
Paper	Personal statement for children under 10 (Form 904965_RL)
Paper	Children's trauma option Personal Statement (Form 09178_RL)

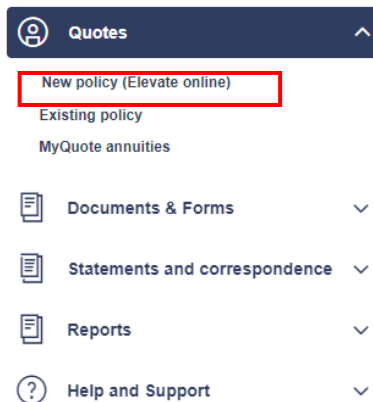
Generating a quote

Step 1

- [Log in](#) to My Resolution Life

Step 2

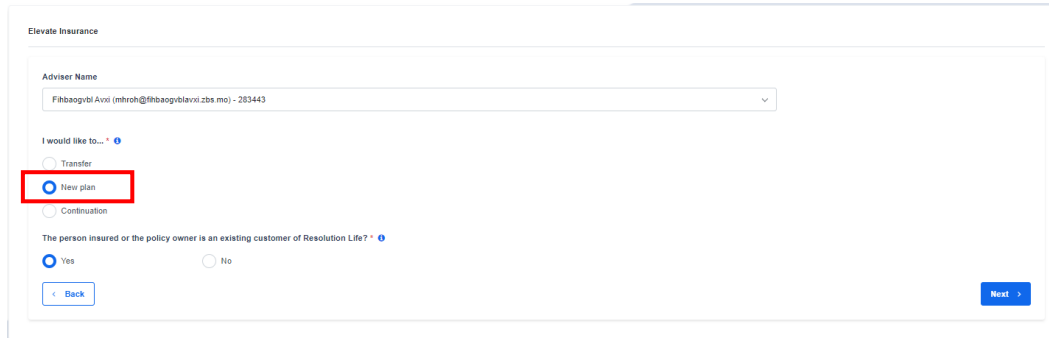
- Select **Quotes** in the left-hand menu
- Select **New policy Elevate online** in the drop-down menu



Generating a quote

Step 3

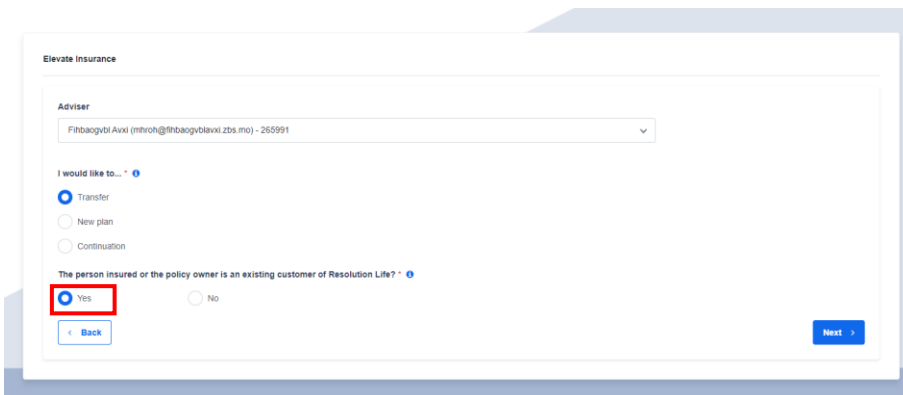
- The application type to be selected is ***New plan***



The screenshot shows the 'Elevate Insurance' form. The 'Adviser Name' field is populated with 'Fihbaogvbi Axi (mhroh@fihbaogvblavxi.zbs.mo) - 283443'. Under the heading 'I would like to...', three radio button options are visible: 'Transfer', 'New plan', and 'Continuation'. The 'New plan' option is selected and highlighted with a red rectangular box. Below this, the question 'The person insured or the policy owner is an existing customer of Resolution Life?' has 'Yes' selected. 'Back' and 'Next' buttons are located at the bottom of the form.

Step 4

- Select Yes for ***The person insured or the policy owner is an existing customer of Resolution Life?***



The screenshot shows the 'Elevate Insurance' form. The 'Adviser' field is populated with 'Fihbaogvbi Axi (mhroh@fihbaogvblavxi.zbs.mo) - 265991'. Under the heading 'I would like to...', three radio button options are visible: 'Transfer', 'New plan', and 'Continuation'. The 'Transfer' option is selected. Below this, the question 'The person insured or the policy owner is an existing customer of Resolution Life?' has 'Yes' selected and highlighted with a red rectangular box. 'Back' and 'Next' buttons are located at the bottom of the form.



Generating a quote

Step 5

- In the client details section, enter the details for the **Parent**.

Elevate Insurance

Quote request - client details

First name *	Last name *
<input type="text" value="First name"/>	<input type="text" value="Last name"/>
Date of birth *	Age *
<input type="text" value="dd/mm/yyyy"/> 	<input type="text"/>
State *	
<input type="text" value="Select"/> 	
Gender *	
<input type="radio"/> Male	<input type="radio"/> Female

Generating a quote

Step 6 (cont..)

- When selecting occupation, please use specific occupation.

Customer occupation *

Related	Life	Trauma	TPD Any	TPD Own	TPD ADL	IP
Agent - Real estate (Light manual work)	A	A	B	N/A	A	B
Electrician - Domestic or light commercial (with trade qualification)	A	A	C	N/A	A	C
Exporter / importer - Some light manual work	A	A	B	N/A	A	B
Importer / exporter - Some light manual work	A	A	B	N/A	A	B
Repairer / service technician - Light manual (eg office machines)	A	A	B	N/A	A	B
Shop proprietor / assistant - Hardware (light lifting)	A	A	C	N/A	A	C
Shop proprietor / assistant - Not otherwise rated (Light goods only (eg clothes))	A	A	B	N/A	A	B
Storeperson (light manual)	A	A	C	N/A	A	C

< Back

Next >

Generating a quote

Step 7

- Depending on the policy type, you will be directed to a selection window.
- Select **cover type** and add sum insured.

Elevate Insurance

Quote request - configure plan

Select a standalone plan below and configure it here. Linked options are configured from within standalone plans.

The screenshot shows a configuration window for a Life insurance plan. At the top, there are several tabs: 'Life', 'Standalone TPD', 'Standalone Trauma', 'Income Protection', 'Business Expenses', 'Discounts & Reductions', and 'Loadings'. The 'Life' tab is selected and highlighted with a red box. Below the tabs is a dark blue panel with a close button (X) in the top right corner. On the left of this panel is a shield icon with a cross and the word 'Life'. In the center, there is a text input field for 'Sum insured' containing '\$200,000', which is highlighted with a red box. To the right of this field is the label 'Premium' and a dropdown menu showing '\$/year'.

Step 8

- Select policy **Ownership**
- Select **Premium structure**
- Tick box to add child trauma, enter sum insured and number of children

The screenshot shows the configuration options for the policy. Under the 'Ownership' section, there are four buttons: 'Individual', 'SMSF', 'Super', and 'Company or trustee'. The 'Individual' button is selected and highlighted with a red box. Under the 'Premium Structure' section, there are two buttons: 'Stepped' and 'Blended'. The 'Stepped' button is selected and highlighted with a red box. Under the 'Optional benefits' section, there is a checkbox for 'Child trauma' which is checked and highlighted with a red box. Next to it is a text input field containing '\$50,000'. To the right, there is a dropdown menu for 'Number of children' set to '1', also highlighted with a red box.

+ Add linked option

Generating a quote

Step 9

- Click on Discounts and Reductions tab and waive the policy fee on the child trauma quote to link the new child trauma plan to their parent's policy.

Elevate Insurance
Quote request - configure plan

Select a standalone plan below and configure it here. Linked options are configured from within standalone plans.

Life Standalone TPD Standalone Trauma Income Protection Business Expenses **Discounts & Reductions** Loadings

Discounts & reductions

Quote type *

Campaign code *

Do you currently hold any existing Resolution Life insurance? ⓘ

Waive plan fee

Ok

Elevate Insurance
Quote request - configure plan

Select a standalone plan below and configure it here. Linked options are configured from within standalone plans.

Life Standalone TPD Standalone Trauma Income Protection

Discounts & reductions

Quote type *

Campaign code *

Do you currently hold any existing Resolution Life insurance? ⓘ

Waive plan fee

Back

Existing insurance

Great news, because your client already holds existing insurance they may be eligible for further discounts.

Large case discount (LCD)

If your client has existing life, TPD or Trauma cover on a policy that starts with a P or D2, which is not being replaced, enter the sum insured amounts in the 'existing insurance' fields.

Multi plan discount (MPD)

A MPD provides a discount to plans and / or options when your client has both of the following types of eligible plans:

- Income insurance or business expenses, and lump sum (life, TPD or Trauma plan).

At least one of the plans must be from the current 22/11/2015 series.

Eligibility (for existing cover)

Existing cover may also be eligible if it meets the following:

- Must have a series date no earlier than 06/05/2005.
- For the IP/BE plans, the client must have an MP AA, A, B, C, D or F occupation rating.
- Cannot have an RACV Business Rewards or Workplace Rewards discount on the cover.
- Was issued by NMLA or is an existing Elevate policy.

I have read the above and would like to proceed.

Ok

Client Test Parent

Super premium frequency

Non-super premium frequency

Life ⓘ	
Individual	
Shopped premium	
Total premium	\$0 Annual
Sum insured	\$200000
Premium (non-super)	\$0 / Yearly

Total premiums

Non-Super	/Yearly
Total	\$0 Annual

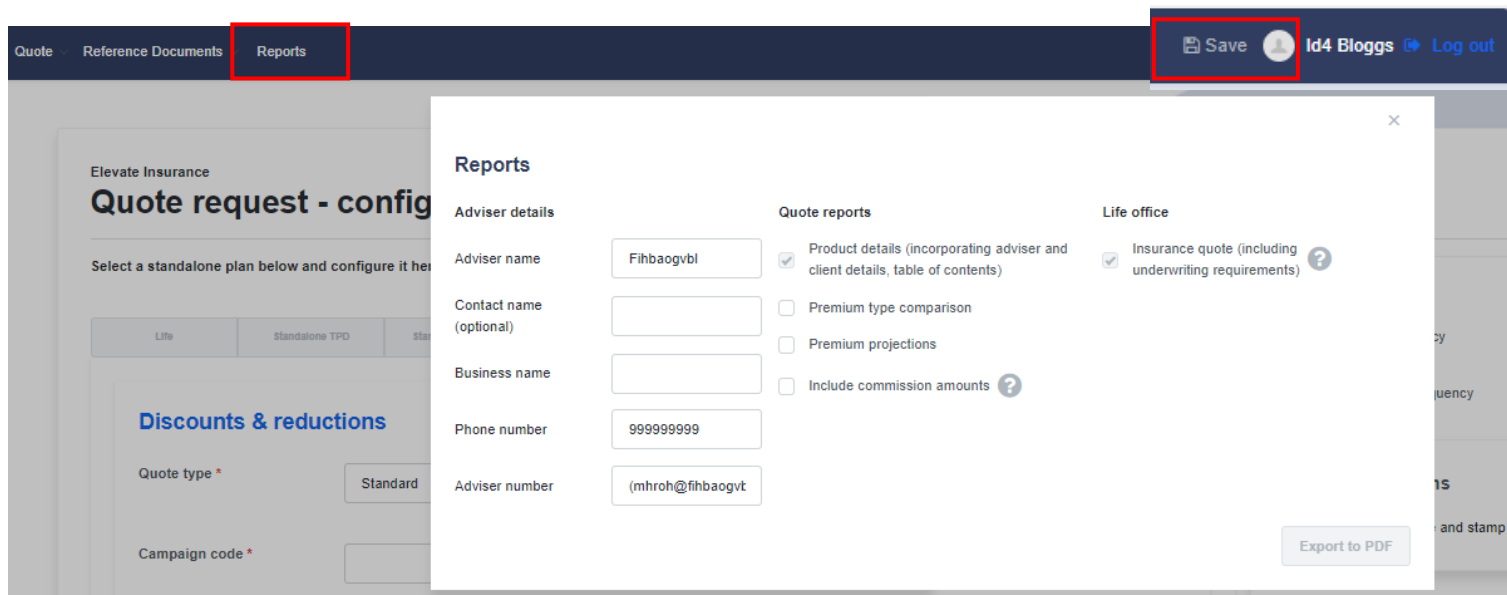
* including plan fee and stamp duty

Review Apply

Generating a quote

Step 10

- Save your quote.
- Select the Reports button to export the quote to a PDF



Generating a quote

- Once you have exported the quote to a PDF, you will **need to ignore the full premium amount** on the quote and only look at the child trauma portion.

Sample quote below:

Summary of the plan details and cost of insurance

Plan details	Sum insured	Premium structure	Monthly non-super premium
Life Insurance Plan	\$200,000	Stepped	\$11.74
Children's Trauma	\$50,000	Level	\$8.57
Total			\$20.31
Included Stamp Duty			\$0.41
Annualised Total			\$243.72

- Return both quote and Children's Trauma Option Personal Statement form to insurance@resolutionlife.com.au

What you need to know

Resolution Life Australasia Limited ABN 84 079 300 379, AFSL No. 233671 (Resolution Life) is part of the Resolution Life Group and can be contacted via the Contact us page.

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