ROYAL LONDON

We've improved our protection adviser dashboard

We’ve made it easier for you to manage plans which have previously started – learn more about what’s changed.

Improvements to our Protection Adviser Dashboard

We’ve added a new ‘Plans’ tab to your Adviser Dashboard to make it easier for you to manage plans which have previously started. This is currently only available for financial advisers – we’ll be rolling this out for administrators soon.

What is the new ‘Plans’ tab for?

Here, you’ll find all your previously started or cancelled plans. We’ve automatically moved all your relevant plans into this tab from your ‘Submitted applications’ tab

You can now also get real-time updates on Sum Assured, Term, and Premium information, letting you see the impact of any changes that have been made. Plus, we’ve improved the accuracy of the status information provided for cancelled or lapsed plans.

Additionally, we’ve added plans that were previously unavailable online, including those submitted via paper applications, so you can view even more of your previously started plans online.

What else have we improved?

You’ll also notice that we’ve introduced a clean new look for our ‘Plan details’ screen, which breaks down policy information, evidence and documents available to download.

See the changes for yourself

Watch our short demonstration video for an overview of all the changes mentioned above.

We’re working hard to make these updates available for administrators too - look out for updates, coming soon.