

This is script that **must** be **read word for word** to the customer.

This is script that that **must** be **read word for word** to the customer, as and when applicable.

This is script that **must** be read to the customer but it can be said in your own words.

This is **not** script and is positioned throughout to provides guidance / prompts.

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## NWG Platinum Account Sales Script

I want to make sure I completely understand your needs and make any necessary adjustments.  
Does anything impact your ability to deal with or communicate with us?

If Yes      Based on your circumstances how can we support you? and then [click here](#)

If the customer does not understand or has misinterpreted the question, read the below:

For example, if you have a visual or hearing impairment, welfare issues or anything else you feel is important for us to know about.

If there is an existing vulnerability flag – [click here](#)

Please can I confirm that you have listened to and understood the pre-recorded announcement at the beginning of the call?

If No – reconfirm the recorded greeting on the IVR addendum – [click here](#)

How many people do you want to include in any new upgrades today?

For multiple people, add each insured person that requires the upgrade and read below:

Please can you confirm that you have the consent of those to be insured to record their personal information?

Continue over page to upgrade menu.

Confirm with the customer the upgrade(s) required.



**New medical  
screening or  
change in health**



**Medical  
(Renewal)**



**Age Extension**



**Trip Extension**



**Sport / Activity**



**Business Cover**



**Saved Quote/  
Medical Draft**



**Guest**



**Cancellation**



**Golf Cover**



**Wedding Cover**

# Trip Extension



Your policy covers you for up to 31 days per trip. The Trip Extension upgrade can provide cover up to a maximum of 6 months per trip. You can choose to extend the cover to either 45 62 93 120 or 6 months per trip.

Which option would you like to proceed with?

All other terms and conditions of your policy remain the same, however, you will be increasing the duration for a trip from 31 days to < XXX > days per trip throughout the duration of this upgrade.

Please select / add each insured person requiring the upgrade.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Age Extension

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You can insure travellers aged 70 or over by purchasing an age extension upgrade for them.

Once purchased, these travellers will then benefit from all the base policy covers and be eligible to purchase the other policy upgrades too. All other terms and conditions of your policy remain the same.

The travel insurance does not cover claims related to pre-existing medical conditions unless they have been declared and accepted by us. Are there any pre-existing medical conditions that you need to declare?

If Yes [Continue to a New Medical Screening](#)

[Continue to a Medical Screening \(Renewal\)](#)

If No [Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Guest Cover

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The upgrade is only valid whilst the Guest is travelling with the account holder or the account holders' partner. The upgrade is only valid for a guest who lives in the UK and for whom the appropriate additional premium has been paid.

For the full terms and conditions that apply, please refer to your policy wording.

The travel insurance does not cover claims related to existing medical conditions unless they have been declared and accepted by us. Does your guest need to declare any pre-existing medical conditions?

If Yes [Continue to Medical Screening](#)

If No [Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Golf Cover

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We will pay up to £1,500 for your golf equipment, which is lost, stolen or accidentally damaged during your trip.

We will pay up to £250 for the hire of replacement golf equipment for the remainder of your trip if your own golf equipment has been lost, stolen or accidentally damaged while on your trip.

We will extend the cover under the Cancellation and Cutting Short Your Trip sections, if you have an injury or illness that prevents you from playing golf.

We will pay up to £250 per trip for your unused green fees that have been paid or you legally have to pay that you are unable to use on your trip because:

- you have an injury or illness that prevents you from playing golf; or
- you have a valid claim under one or more other section of this policy that prevents you from playing golf.

For the full terms and conditions that apply, please refer to your policy wording.

Please select / add each insured person that requires the upgrade.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Business Cover

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Your base policy provides cover for your standard personal baggage items, however, it does not cover business equipment that you might be taking away with you.

Purchasing the Business Cover upgrade will provide an additional cover of up to £3,000 in total for loss, theft or damage to your business equipment. A single item, pair or set limit of £1,000 applies.

Cover up to £500 to hire emergency replacement business equipment if yours is lost, stolen, damaged or delayed by more than 4 hours on your outbound journey to your destination.

Cover up to £1,500 travel costs for a colleague to replace you to continue your business duties following a covered event.

For the full terms and conditions that apply, please refer to your policy wording.

Please select / add each insured person requiring the upgrade.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Wedding Cover

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We will pay up to £1,500 per insured couple for wedding attire which is lost, stolen or accidentally damaged during your trip.

We will pay up to £250 per insured couple for the rings to be used during the ceremony if they are lost, stolen or accidentally damaged during your trip.

We will pay up to £1,000 per insured couple for wedding gifts you have received during the trip if they are lost, stolen or accidentally damaged during your trip.

We will pay up to £750 per insured couple for the additional cost to:

- obtain reprinted photographs or duplicate physical copies of the video recordings if your original professional photographs or video recordings are lost, stolen or accidentally damaged during your trip and there is a charge for these to be replaced; or
- hire an alternative professional to take photographs or video recordings of your wedding if your pre-booked professional photographer is unable to fulfil their obligations to you due to illness, injury or unforeseen transport problems during your trip.

For the full terms and conditions that apply, please refer to your policy wording.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

[Return to Top](#)



# Cancellation Extension

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Your policy provides cover for cancellation up to £5,000 per insured person.

The cancellation upgrade can provide cover up to a maximum of £20,000. You can choose to extend the cover to either £7,500, £10,000, £12,500, £15,000, £17,500 or £20,000.

Which option would you like to proceed with?

All other terms and conditions of your policy remain the same, however, you will be increasing the cancellation limit from £5,000 to [ amount ] for the duration of the upgrade.

Please select / add each insured person requiring the upgrade.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

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# Sports & Activities Upgrade



For the Additional Sports and Leisure Activities – [click here](#)

Your policy covers you for many sports and activities, the additional sports and activities upgrade will also provide cover for [activity].

You can find a full list of the sports and activities that are covered within the upgrade on the Allianz Assistance Hub. For the full terms and conditions, please refer to your policy wording.

Please select / add each insured person requiring the upgrade.

[Continue to Price Presentation](#)

[Quote for Another Upgrade](#)

[Return to Top](#)

## **PRICE PRESENTATION**

To confirm the upgrade would start on < DD/MM/YYYY > and end on < DD/MM/YYYY >.

The total premium including insurance premium tax is £XX.

Is this something you would like to go ahead with today?

If Yes            [continue with script](#)

If No            [click here](#)

## **AUTOMATIC RENEWAL**

Would you like the upgrade set to automatically renew next year?

If Yes            [continue with script](#)

If No            [click here](#)

You have agreed to set up continuous payments. We will automatically renew your upgrade each year and charge your payment card until you instruct us to stop.

We will contact you at least 21 days before your upgrade expires. If you are still eligible for cover, we will renew your upgrade using your latest payment details. If you need to make changes or you do not wish to renew, please contact us before your renewal date.

## **IMPORTANT STATEMENTS**

Please note, if you or anyone included in the upgrades reach the policy age limit before the expiry date and an age extension has not been purchased or renewed, your upgrades will be cancelled, and you will receive a pro-rata refund for the unused portion of the upgrade.

You will need to keep your bank account valid throughout the duration of this upgrade. To complete the sale, are you happy to purchase the upgrade based on the limited information I have given you today?

If Yes            Continue with script

If No            Please advise that you cannot proceed with sale of the upgrade

## **CONTACT NUMBERS**

If you need to make a claim, please visit the Allianz Assistance Hub that you will find within your online banking or mobile banking app. You can also contact the Travel Claims team by telephone. Would you like their number?

NatWest    0345 609 0453

RBS            0345 609 0456

If you require emergency medical assistance, please call the 24-hour emergency helpline. Would you like their number?

NatWest +44 208 666 9275

RBS +44 208 666 9277

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## **UPGRADE CORRESPONDENCE**

Please confirm the email address held for the customer / ask for the customers email and repeat phonetically.

You will receive an email confirming your upgrade purchase within the hour.

Please check your purchase confirmation documents carefully and contact us again if anything needs correcting.

### **For Postal Documents:**

The upgrade confirmation will be posted to you, please contact us again if you do not receive this within 10 days.

Please check your purchase confirmation documents carefully and contact us again if anything needs correcting.

## **CANCELLATION RIGHTS**

For full terms and exclusions of your policy, please refer to the Travel Insurance Terms booklet.

If you change your mind about the cover, you have the right to cancel this upgrade, without charge, within 14 days from receiving the upgrade confirmation, providing you have not travelled or made a claim.

## **UPGRADE CONFIRMATION**

Reconfirm the premium, capture payment details and process.

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

## **ADD COMMENT**

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)

*Script End*

*Script End*

*Script End*

*Script End*

*Script End*

## **DATA PRIVACY STATEMENT**

We require your consent to collect and process your health and medical data solely for the insurance policy you are subscribed to.

Without your consent, we will be unable to provide the upgrade you may wish to purchase or process any claims you may have.

Are you happy to proceed?

If Yes            [click here](#)

If No            [please advise that you are unable to proceed with the medical screening](#)



## **DATA PRIVACY STATEMENT**

We require your consent to collect and process your health and medical data solely for the insurance policy you are subscribed to.

Without your consent, we will be unable to provide the upgrade you may wish to purchase or process any claims you may have.

Are you happy to proceed?

If Yes            [click here](#)

If No            please advise that you are unable to proceed with the medical screening

### **IMPORTANT!**

If the caller is not the beneficiary of the medical upgrade, verbal consent must be obtained from the beneficiary before proceeding. Without consent you must not disclose any medical information to anyone other than the beneficiary of the medical upgrade.

## **(RENEWAL) MEDICAL SCREENING QUESTIONS**

Last year you declared;

Confirm names of all previously declared medical conditions (but not the sub-questions)

- 1) Have you had any newly diagnosed medical conditions, this may include a visit to a doctor or clinic, or if you have been to hospital as an inpatient or outpatient? (Y/N)

\*A visit to a doctor, clinic or hospital is only applicable to new medicals conditions and not existing medical conditions

If yes – [Click Here](#) as a full screening will need to be completed.

- 2) Has there been any change to the conditions you previously declared? (Y/N)

\*Routine monitoring does not class as a Yes response

If yes – [Click Here](#) as a full screening will need to be completed.

- 3) Has there been a change to any of the medication you take for the conditions you previously declared, or have you been prescribed any new medication? (Y/N)

If yes – [Click Here](#) as a full screening will need to be completed.

If customer answers 'NO' to all the questions above please continue by reading the below:

In relation to your medical conditions, is there anything else you would like to tell us before we continue or do you have any questions?

If NO:

I will renew your medical upgrade based on the information provided last year.

[Click here to Continue](#)

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## **MEDICAL SCREENING QUESTIONS**

Before advising the customer of the outcome of their medical condition(s), please ensure you have asked the customer all five medical screening questions below.

- Currently, are you awaiting tests, investigations, treatment, surgery; awaiting the results of any tests or investigations?

### **If YES -**

Remember we are unable to screen medical conditions that are currently undiagnosed, the customer should be advised to contact us again once a formal diagnosis has been received.

Please continue and screen any diagnosed medical conditions.

In the last 12 months have you:

- Been prescribed any medication, this includes one off, ongoing and repeat prescriptions whether taking them or not?
- Received treatment for or consulted a doctor about any medical condition?
- Attended a hospital or clinic as an out-patient or in-patient for any reason?
- Been diagnosed as having a terminal condition?

If the customer answers “No” to all 5 medical screening questions - [click here](#)

You have declared < list conditions that have prompted a ‘Yes’ response >.

Do you have any other medical conditions that you need to declare?

If your customer has declared;

- **ONE** pre-existing medical condition, please check the No Screen Medical Conditions list on the following page.
- **TWO OR MORE** pre-existing medical conditions, please complete a screening in Agent Mode.
- Only **ONE** condition but it’s still under investigation or awaiting a diagnosis [click here](#)

## **NO SCREEN MEDICAL CONDITIONS**

If the customer has declared only **ONE** pre-existing medical condition and this appears in the list below, please read;

- Is the medical condition stable and well controlled?
- Has it required any change in medication or medical intervention in the last 12 months?

If the customer **meets both** of the above criteria – [click here](#)

If the customer is **unable** to meet both of the above criteria; their condition does not appear below, please continue to complete a screening in agent mode and assess all pre-existing medical conditions that have been declared as part of the 5 medical screening questions.

- |   |   |   |
|---|---|---|
| • Acanthosis nigricans  | • Ear infection (only if fully resolved and no reoccurrence in the last 6 months) | • Osteoarthritis  |
| • Acid reflux   | • Eczema  | • Osteoporosis  |
| • Acne  | • Enlarged prostate (benign)  | • Overactive bladder  |
| • Allergy   | • Epilepsy  | • Overactive thyroid (hyperthyroidism)  |
| • Alopecia  | • Essential tremor  | • Parkinson's disease   |
| • Anxiety   | • Fibromyalgia  | • Psoriasis   |
| • Asthma  | • Glaucoma  | • Raynaud's disease   |
| • Athlete's foot  | • Glue ear  | • Rheumatoid arthritis  |
| • Back pain   | • Goitre  | • Rosacea   |
| • Basal cell carcinoma  | • Gout  | • Shingles  |
| • Bell's palsy  | • Haemorrhoids  | • Sinusitis   |
| • Blepharitis   | • Hernia  | • Tendonitis  |
| • Carpal tunnel syndrome  | • High blood pressure (hypertension)  | • Tinnitus  |
| • Cataracts   | • High cholesterol (hypercholesterolemia)   | • Tonsillitis (only if fully resolved and no reoccurrence in the last 6 months)                   |
| • Chickenpox  | • Hives   | • Underactive thyroid (hypothyroidism)  |
| • Claudication  | • Irritable bowel syndrome  | • Urinary tract infection (UTI) (only if fully resolved and no reoccurrence in the last 6 months) |
| • Coeliac disease   | • Low blood pressure (hypotension)  | • Varicose veins  |
| • Constipation  | • Meniere's disease   | • Vertigo   |
| • Depression  | • Menopause   | • Vitiligo  |
| • Diabetes  | • Migraine  |   |
| • Diarrhoea and/or vomiting (only if fully resolved and no reoccurrence in the last 6 months) | • Nasal polyps  |   |
| • Diverticulitis  |   |   |
| • Dry eye syndrome  |   |   |
| • Dyspepsia (Indigestion)   |   |   |

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## **SCREENING OUTCOME**

If after the completion of a further screening the following message is displayed;

“No medical screening is necessary” [click here](#)

“We are unable to offer cover for your medical condition” [click here](#)

## **PRICE PRESENTATION**

To confirm the upgrade would start on < DD/MM/YYYY > and end on < DD/MM/YYYY >.

The total premium including insurance premium tax is £XX.

Is this something you would like to go ahead with today?

If Yes [continue with script](#)

If No [click here](#)

If the premium exceeds £100, read the statement below:

I need to advise that you may be able to obtain an alternative travel insurance policy by contacting the Money Helper travel insurance directory. For further details of the directory, you can contact them on 0800 138 7777, alternatively you can visit their website [www.moneyhelper.org.uk](http://www.moneyhelper.org.uk) and search for ‘travel insurance directory’.

## **AUTOMATIC RENEWAL (ONLY IF ALSO SELLING NON-MEDICAL UPGRADE)**

Would you like the upgrade set to automatically renew next year?

If Yes            read below

If No            continue to customer happy to proceed

You have agreed to set up continuous payments. We will automatically renew your upgrade each year and charge your payment card until you instruct us to stop.

We will contact you at least 21 days before your upgrade expires. If you are still eligible for cover, we will renew your upgrade using your latest payment details. If you need to make changes or you do not wish to renew, please contact us before your renewal date.

## **IMPORTANT STATEMENTS**

Please note that this upgrade will not cover claims relating to existing medical conditions unless they have been declared and accepted by us. It is your responsibility to ensure that everybody covered by the insurance are aware of the health exclusions.

If there are any changes in your health or prescribed medication, between now, booking a new trip, or before you travel you will need to call us to declare again. That might result in an extra premium to be paid or we might not be able to offer cover.

If you or anyone included in the upgrades reach the policy age limit before the expiry date and an age extension has not been purchased or renewed, your upgrades will be cancelled, and you will receive a pro-rata refund for the unused portion of the upgrade.

You will need to keep your bank account valid throughout the duration of this upgrade. To complete the sale, are you happy to purchase the upgrade based on the limited information I have given you today?

If Yes            continue below

If No            please advise that you cannot proceed with sale of the medical upgrade

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## **CONTACT NUMBERS**

If you need to make a claim, please visit the Allianz Assistance Hub that you will find within your online banking or mobile banking app. You can also contact the Travel Claims team by telephone. Would you like their number?

NatWest                    0345 609 0453

RBS                        0345 609 0456

If you require emergency medical assistance, please call the 24-hour emergency helpline. Would you like their number?

NatWest   +44 208 666 9275

RBS            +44 208 666 9277

## **UPGRADE CORRESPONDENCE**

Please confirm the email address held for the customer / ask for the customers email and repeat phonetically.

Please confirm the mobile number held for the customer / ask for their mobile number.

Within the hour, you will receive an email confirming your upgrade purchase and a text message containing the password to open your medical declaration document. If you need any assistance with this, please do not hesitate to contact us again

Please check your purchase confirmation and medical declaration documents carefully and contact us again if anything needs correcting.

### **Postal documents requests:**

The upgrade confirmation will be posted to you, please contact us again if you do not receive this within 10 days.

Please check your purchase confirmation and medical declaration documents carefully and contact us again if anything needs correcting.

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## **CANCELLATION RIGHTS**

For full terms and exclusions of your policy, please refer to the Travel Insurance Terms booklet.

If you change your mind about the cover, you have the right to cancel this upgrade, without charge, within 14 days from receiving the upgrade confirmation, providing you have not travelled or made a claim.

## **UPGRADE CONFIRMATION**

Reconfirm the premium, capture payment details and process.

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

## **ADD COMMENT**

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)



*Script End*

*Script End*

*Script End*

*Script End*

*Script End*

## **IVR (INTERACTIVE VOICE RESPONSE) ADDENDUM**

Our calls are recorded and monitored for training, legal and regulatory purposes.

This policy is underwritten by AWP P&C SA and is administered by Allianz Assistance a trading name of AWP Assistance UK Ltd. There is certain information that we need to know as it may affect the terms of the insurance cover we can offer you.

You must, to the best of your knowledge, give accurate answers to all questions when asked. If you do not answer the questions truthfully it could result in your policy being invalid and could mean that all or part of a claim may not be paid.

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AWP      Allianz Worldwide Partners

P&C SA      Property and Casualty Société Anonyme (Public Limited Company)

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## **VULNERABLE CUSTOMER POLICY**

### **Step 2. Obtain Consent and Record the Vulnerability**

Are you happy for me to make a note on our records of what you've shared today?

This will help us consider your circumstances and provide you with the appropriate support.

If YES      Please ensure that the vulnerability is recorded within the Vulnerability section of the account holders Natural Person File or as you complete the sale within AgentMode.

If NO      Continue as usual with the assistance / service, but do not record it.

### **Step 3. Take appropriate action**

This will very much depend on the customers vulnerability, but we should use the information they have given us to us to inform our decision on how we can best support them. i.e., if they tell us they are visually impaired and we are having to send out documents, do they need their documents to be posted in a larger print.

[See Adjustments list](#)

If you are not sure what we can offer/how best to support a vulnerable customer, then reach out to our [Customer Vulnerability Champions](#), Live Desk or Team Manager for guidance.

#### **Step 4. Continually assess any ongoing need**

If a vulnerability flag is present on the customers Natural Person File, we should check if this information is still correct or if they would they like us to update this information first and ask at every subsequent contact.

Existing vulnerability

I note you previously informed us that you are < state permanent vulnerability > and will require < state adjustment >

Based on your current situation is there anything else that impacts your ability to deal with or communicate with us?

## **MEDICAL CONDITIONS DECLINED**

We are very sorry that we're unable to offer you insurance for your pre-existing medical conditions on this occasion.

Please note that your travel insurance policy still remains in force, however, we are unable to cover any claims relating to your pre-existing medical conditions. This includes claims made by any other insured persons where the claim is related to your pre-existing medical conditions.

You may be able to obtain an alternative travel insurance policy by contacting the Money Helper travel insurance directory for people with serious medical conditions.

For further details of the directory, you can contact them on 0800 138 7777 or visit their website at [www.moneyhelper.org.uk](http://www.moneyhelper.org.uk) and search for 'travel insurance directory'.

[To continue with a quote / sale of another upgrade – click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

[Record conversation as a comment in the account holders ABS Natural Person File.](#)

[For guidance when adding a comment – click here](#)

## **CUSTOMER DECLARED ONLY ONE CONDITION ON THE NO SCREEN LIST**

The pre-existing medical condition that you have declared is automatically covered within the no screen medical conditions list and therefore no additional premium will be required.

A record of the medical condition that you have declared will be added to your policy.

If there are any changes in your health between now, before you travel or you book a new trip you will need to call us to declare again. That might result in a premium to be paid or we might not be able to offer cover.

You can contact us again by telephone or by visiting the Allianz Assistance Hub, this can be securely accessed through your mobile banking app or by using Internet Banking.

To continue with a quote / sale of another upgrade – [click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)

## **CUSTOMER ANSWERED 'NO' TO ALL 5 MEDICAL SCREENING QUESTIONS**

As you have answered 'No' to all five of our medical screening questions, no additional premium is required.

However, if there are any changes in your health or prescribed medication between now, before you travel or you book a new trip, you will need to contact us again to re-declare. This might result in a premium to be paid or we might not be able to offer cover.

You can contact us again by telephone or by visiting the Allianz Assistance Hub, this can be securely accessed through your mobile banking app or by using Internet Banking.

To continue with a quote / sale of another upgrade – [click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)

## **NO MEDICAL SCREENING IS NECESSARY**

As a result of the pre-existing medical condition(s) that have been declared and the responses given to our further screening questions, we are prepared to cover the medical condition(s) without any additional premium required.

A record of the medical condition(s) that have been declared will be added to your policy. If there are any changes in your health, between now, before you travel or you book a new trip, you will need to call us to declare again. That might result in a premium to be paid or we might not be able to offer cover.

You can contact us again by telephone or by visiting the Allianz Assistance Hub, this can be securely accessed through your mobile banking app or by using Internet Banking.

To continue with a quote / sale of another upgrade – [click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)



## **MEDICAL UPGRADE QUOTE DECLINED BY CUSTOMER**

I would like to inform you that your travel insurance policy still remains in force, however, we are unable to cover any claims relating to your pre-existing medical conditions. This includes claims made by any other insured persons where the claim is related to your pre-existing medical conditions.

Please note we can only save your medical declaration for up to 7 days. After this time our prices can be subject to change. If you do call back wishing to complete your purchase, we will confirm your declaration again with the representative that you speak to.

Alternatively, you can purchase the upgrade at your own convenience by visiting the Allianz Assistance Hub, which can be securely accessed via your internet banking or phone's banking app.

To continue with a quote / sale of another upgrade – [click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)

## **UPGRADE QUOTE DECLINED BY CUSTOMER**

Please note we can only save your upgrade quote for up to 7 days. After this time our prices can be subject to change. If you do call back wishing to complete your purchase, we will confirm your declaration again with the representative that you speak to.

Alternatively, you can purchase the upgrade at your own convenience by visiting the Allianz Assistance Hub, which can be securely accessed via your internet banking or phone's banking app.

To continue with a quote / sale of another upgrade – [click here](#)

Summarise the call with the customer, provide your name and ask them if there anything else you can help them with?

Thank you for calling Allianz Assistance, have a nice rest of your day..

Record conversation as a comment in the account holders ABS Natural Person File.

For guidance when adding a comment – [click here](#)

## **SAVED QUOTE / MEDICAL SCREENING DRAFTS**

### **Medical Screening Quote**

Please ensure the medical declaration is up to date and accurate by;

1. Reconfirming the declared medical conditions to the customer
2. Reconfirm the questions and answers provided to the detailed screening questionnaire

[Continue](#)

### **Saved Medical Screening Draft**

Please ensure the medical declaration is up to date and accurate by;

1. Reconfirming the declared medical conditions to the customer
2. Reconfirm the questions and answers provided to the detailed screening questionnaire
3. Ask if the customer if they have any other pre-existing medical conditions to declare/add
4. Complete the medical screening in full before providing the customer with a quotation

[Continue](#)

### **Non-Medical Quote**

1. Reconfirm quote to ensure all information is still accurate.
2. If not, update and [Continue](#)

## **ADDING A COMMENT – GUIDANCE**

### **General**

Comments must be added to the Account Holders Natural Person File on each and every contact and should include the following;

- Why the customer contacted
- What have you done to assist with their enquiry
- Where an upgrade has been quoted, the upgrade type and who it was for
- Where an upgrade has been sold, the upgrade type, who it was for and the upgrade number

### **For example;**

*PH called to check if their 19 year old son was covered under his policy.*

*Confirmed son is in FTE and meets dependent child definition. Sent PW via email.*

### **Medical Screening**

If addition to the above guidance, where a customer has declared pre-existing medical conditions, your comment should also include;

- How the 5 medical screening questions were answered i.e., NYNN
- The medical conditions that were declared and who they were for
- Outcome of the medical screening i.e., quoted £XX – customer declined / paid £XX / covered as per NSL / no premium required / cover declined and referred to MH
- Upgrade number (where an upgrade has been sold)

### **For example;**

*PH called to declare PEMC for themselves.*

*NYNN.*

*PH declared HBP and HC – paid £69.70.*

*SHRGBA300553874*