

# VoyagerProtect Broker Guide

## Viewing and Editing a Policy

### Step 1 : Log in

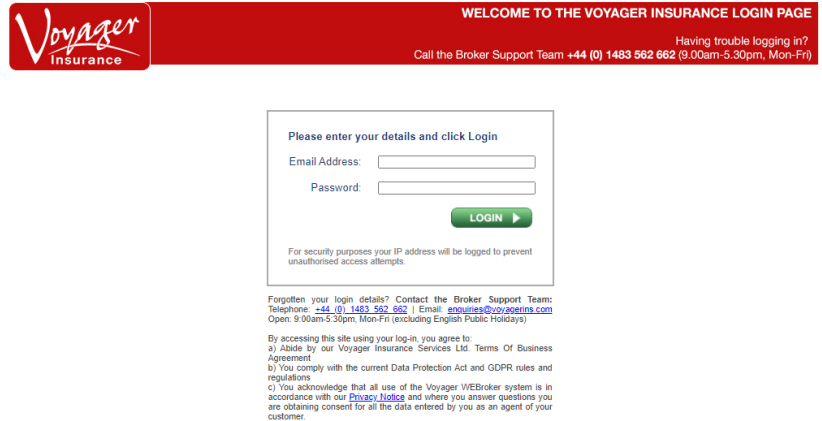
Log in to the WEBroker portal

Log in to the WEBroker portal either by visiting:

[www.WEBroker.co.uk](http://www.WEBroker.co.uk)

or

[www.VoyagerInsurance.com/log-in/](http://www.VoyagerInsurance.com/log-in/)

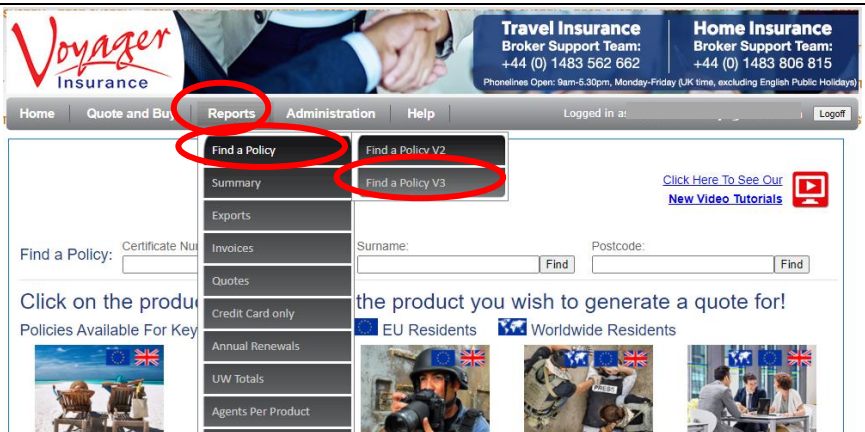


### Step 2 : Locate the Policy

Hover your mouse over the “Reports” menu item on the grey bar.

When the menu appears below, hover over the option for “Find a Policy” then go across and select “Find a Policy V3”.

**Please Note:** Commercial Policies can only be viewed in Find a Policy V3

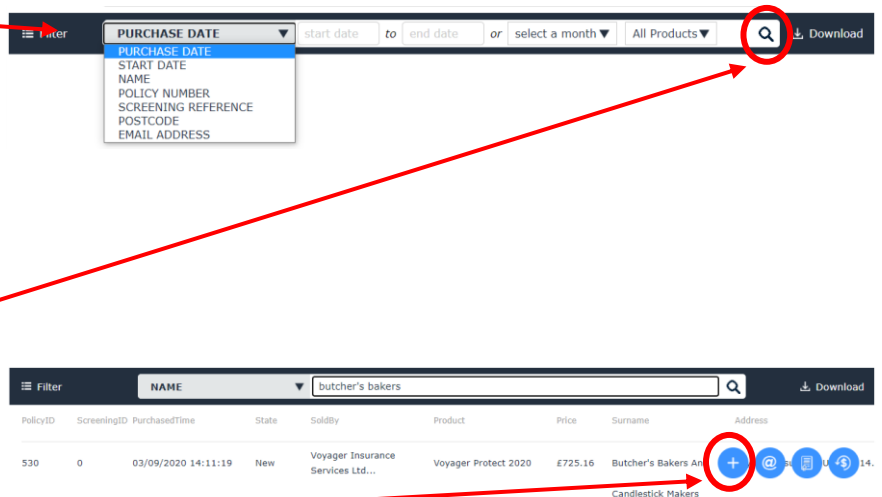


You will then be presented with this page, where you can enter the criteria for your search

The easiest way to search for a policy is by using the Policy Number if you have it. If you don't, you can filter your search using any option in the drop-down list .

Click the Magnifying Glass Icon to run the search

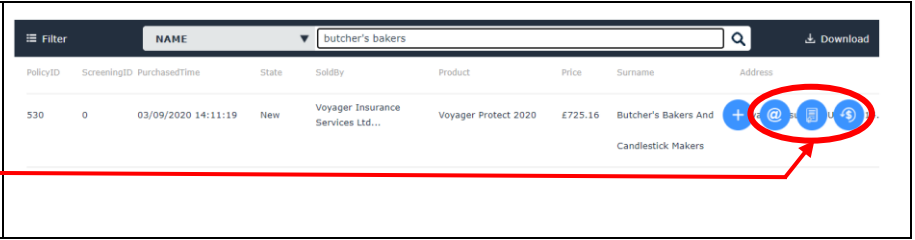
Once you have located the policy, you will be able to view the details of it by selecting the “+” button which will appear when you hover over the policy details with your mouse.



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You can also view and email the documents and issue a refund from here.



### Step 3 : View and Edit the policy

When you press the “+” button, the details will drop down below.

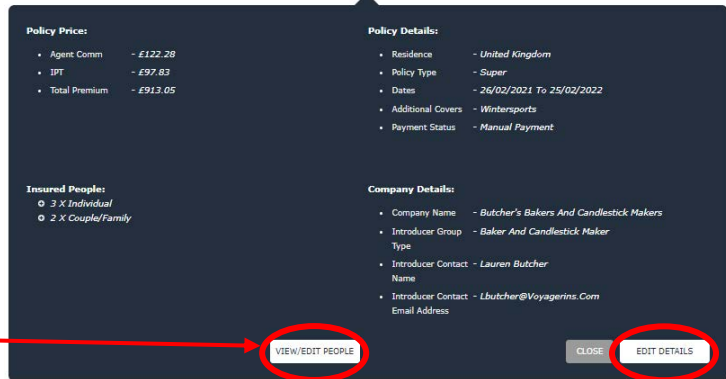
In here, you will see the breakdown of the premium paid, the number of insured individuals and couples/families, the policy details and the company details.

You will also see buttons:

“View/Edit People”

And

“Edit Details”



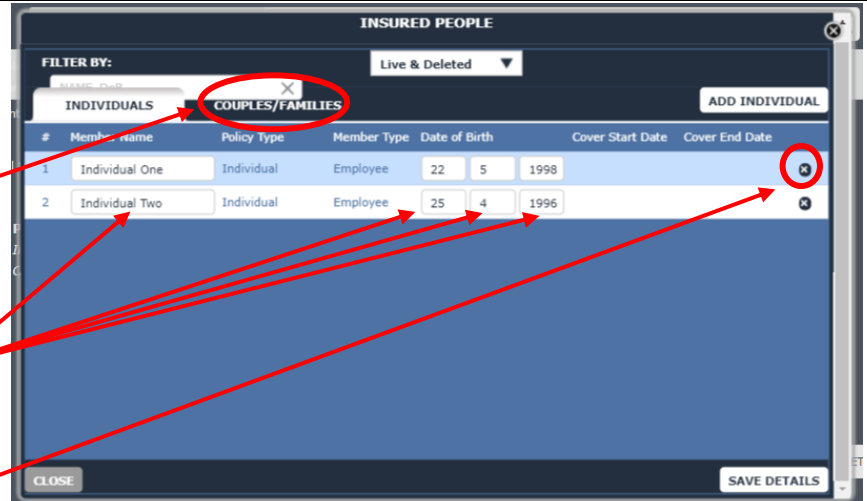
### Step 4 : Edit People

When you press the button for “View/Edit People” on the drop down depicted above, you will see a pop-up box containing the personal details of each individual.

You can see Couples/Families by selecting the **COUPLES/FAMILIES** tab

Here, you can amend the names and DOBs of each insured person by typing in the boxes.

If you wish to remove a person from the cover you can click the “X” on the far right-hand side.



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Once someone has been removed, they will be highlighted in red and the date of removal will be shown.

If you accidentally remove the wrong person and need to re-add them, then you can click the “+” button to reinstate them as long as you don’t close this box.

You can also add new people using the “Add Individual” button, or the “Add Couple/Family” button when in that tab, which will populate a new field for you to complete.

You can select the date when cover for the new person is to begin.

**Please note** that midterm membership adjustments cannot be backdated and the effective date of the adjustment can be a maximum of one month ahead of the processing date.

Once the required changes have been made, any changes in premium will be shown in the bottom right-hand corner.

**Please note** that there is no minimum premium in respect of midterm adjustment, additional or return premiums.

The “Save Details” button will take you through to the payment screen where you can select the payment method.

#	Member Name	Policy Type	Member Type	Date of Birth	Cover Start Date	Cover End Date	
1	Individual One	Individual	Employee	22 5 1998		16/9/2020	+
2	Individual Two	Individual	Employee	25 4 1996			x
		Individual	Employee	DAY MONTH YEAR	16/9/2020		x
		Individual	Employee	DAY MONTH YEAR	16/9/2020		x

CLOSE TOTAL AMOUNT TO CHARGE: £120.78 SAVE DETAILS

#	Member Name	Policy Type	Member Type	Date of Birth	Cover Start Date	Cover End Date	
1	Individual One	Individual	Employee	22 5 1998		16/9/2020	+
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		Individual	Employee	DAY MONTH YEAR	16/9/2020		x
		Individual	Employee	DAY MONTH YEAR	16/9/2020		x

CLOSE TOTAL AMOUNT TO CHARGE: £120.78 SAVE DETAILS

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You can then select “Credit Card” and take card details for the additional premium. If you have account facilities you can also add the premium to your account by clicking “Account Payment”.

The certificate will then have been updated.

### Step 5 : Editing Policy Details

To edit the policy and company details you need to select the “Edit Details” button on the drop-down summary.

The details fields will then become editable and you will then be able to overtype and amend the dates and the company details.

Once all relevant changes have been made, click “Save” and wait for the page to refresh and confirm that the changes have been made.

The certificate will then have been updated.