FOR HR AND FINANCE

The Account — a walkthrough

Every screen on your account, what it shows, and what it will never show. Claims reach you as aggregates and never as people.

Overview

/account — The overview: premium, people covered, renewal date, and the commission agreed with your broker. The commission card is the number this product exists to show you. It cannot be edited by anyone, including us.

Requests

/account/requests — Everything you have asked your broker to do, and their replies, in one thread each. Raise a request here rather than by email, so the asking and the answering stay in the same record.

Your people

/account/members — Your roster — who is on the policy, who is waiting for access, joiners and leavers. Add one by hand, upload the blank template, or issue an API key and let your HRIS push them.

Claims

/account/claims — Claims as aggregates only: totals, how many settled, how long they took. Never who claimed. Change the period with the range picker. Nothing shows below three claims, by design.

Insights

/account/insights — What your own figures are telling you, each with the evidence behind it — plus what members reported about using the policy. The reported figures are counts across everyone and appear only at three or more. The 'did not understand it first' column is the one to raise with your broker.

Coverage map

/account/coverage — Where your people are, mapped, with every country by number of lives. Counted from the roster you have loaded, which is not the same as the headcount on the policy — the difference is shown.

Broker tasks

/account/tasks — Every duty your broker agreed to, with the date it was due. Late ones first. This is the page to open before a renewal conversation. Done duties stay visible.

The record

/account/record — Everything that has happened on the account, in order. Nothing here can be edited, including by us. A correction is a new entry and both stay.