

Using Lockton's Online Proposal Form – an Introduction

Our online proposal form has been designed to be as user-friendly and intuitive as possible, but we know that some of you may want some additional assistance. This guidance provides a step-by-step guide to help familiarise you with our online form.

It has real benefits over the paper or pdf alternatives. It means

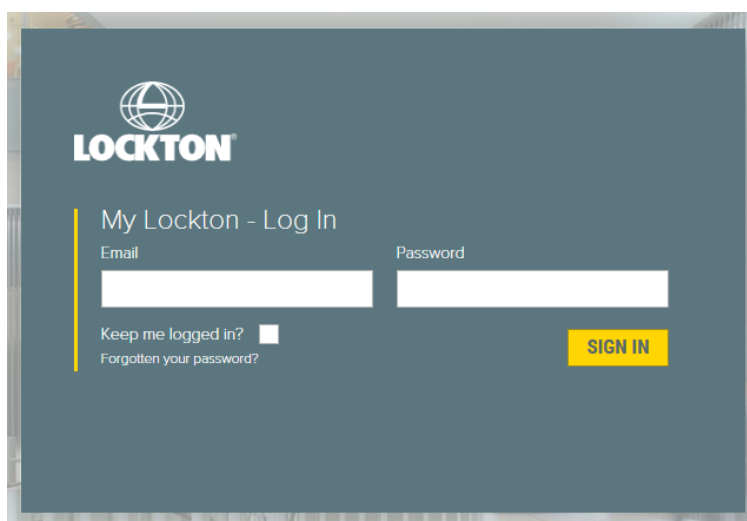
- fewer questions for you to answer
- pre-population of the form insofar as permitted by insurers
- automatic error checking meaning fewer returned forms; and
- faster processing of your application.

Logging In

You can access your Online Proposal form directly from the website www.locktonlaw.scot - simply click on the log-in icon from the menu



Or go direct to www.locktonlaw.scot/dashboard



Tip

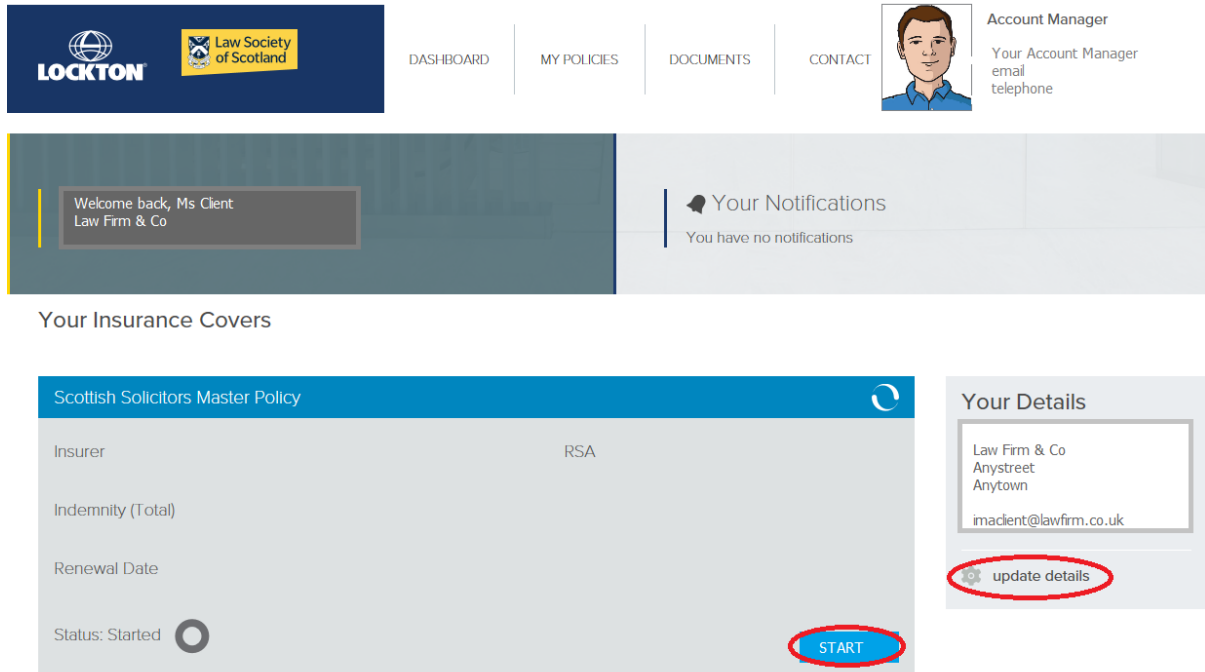
If you use the log-in at www.locktonlaw.scot/dashboard you can tick the 'keep me logged in' box to prevent your proposal form timing out after a period of inactivity.

Your username is the email address we have on record for you.

It is important that you set your own secure password. Therefore on first log in, simply click the 'Password Reset' button. You should receive an email with a link to change your password within a couple of minutes. If you ever forget your password in future, you can use the this reset function in exactly the same way.

Introducing your client dashboard

When you log-in, you will be taken to your client dashboard. From here you can access your proposal form, update your contact details, change your password, and - after renewal – access all your renewal documentation.



The screenshot shows the Lockton client dashboard. At the top, there is a navigation bar with the Lockton logo, the Law Society of Scotland logo, and links to DASHBOARD, MY POLICIES, DOCUMENTS, and CONTACT. On the right, there is a profile card for the Account Manager, showing a photo and contact information. Below the navigation bar, the dashboard is divided into two main sections. The left section, titled 'Your Insurance Covers', displays a 'Scottish Solicitors Master Policy' with details such as Insurer (RSA), Indemnity (Total), Renewal Date, and Status (Started). A 'START' button is highlighted with a red circle. The right section, titled 'Your Notifications', shows 'You have no notifications'. Below this, there is a 'Your Details' section with contact information for Law Firm & Co, including an email address. An 'update details' button with a gear icon is highlighted with a red circle.

Your dedicated Lockton Account Manager is shown at the top right of the dashboard – and feel free to contact them at any stage if you have any queries regarding the online proposal form, or your insurances in general.

The dashboard view summarises the insurances you hold with us, and the status of any renewal application process. To access your proposal form for the first time, simply click on the Start/Apply Now button.

You can change your password using the 'Update Details' tab on the dashboard. Type in your preferred password- and don't forget to click 'SAVE'.

What to do when accessing the form for the first time

When you access your proposal form, you will have to read and acknowledge information regarding the 2015 Insurance Act before you can view your form.

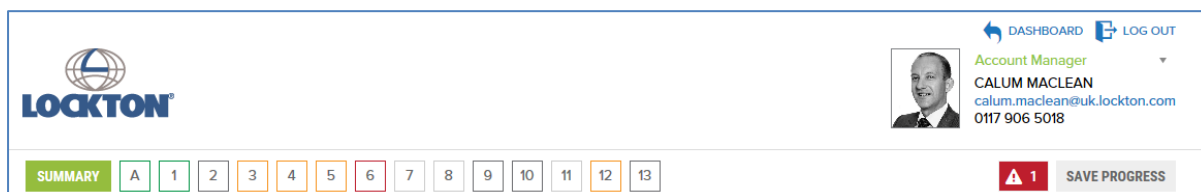
We recommend that you take a few minutes to read the simple guidance in the Help Section (click on the Help icon at the top right hand side of the form).



Navigating the Form

Navigating the form is simple. Just scroll through the form, or jump to a section using the section numbers at the top of the screen.

To navigate through the form, either use your mouse, or use the 'Tab' keys. Do NOT use the up/down arrows on your keyboard.



The summary screen (accessed by clicking on the green Summary button on the far left) gives you an overview of your progress on the form, and highlights any sections that may contain errors.

You can also scroll directly to the relevant error sections by clicking the red Warning symbol next to the Save Progress button (top right of the navigation pane). This will show amber, when there are no errors in the form, but some sections not completed, or green if all sections in the form are completed without obvious errors.

The colour coding is carried across into the navigation bar and is simply a visual cue indicating whether a question is complete (green), in progress (amber), contains errors (red), or is not applicable (grey).


Completing the form

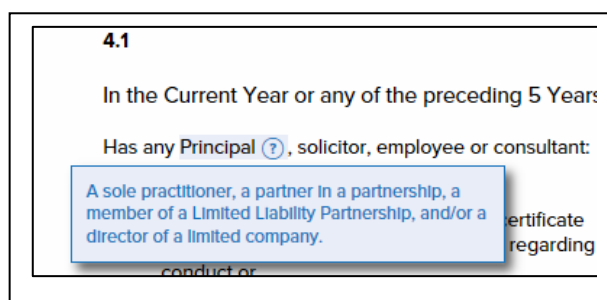
Your form is substantially pre-populated. We nonetheless recommend reading through the proposal form quickly before you start, to identify which bits of information may take longer to collate than others. Delays can be caused when colleagues who are required to provide key data are busy or away from the office for a period.

The form is responsive, and only displays questions relevant to you. We recommend starting by completing the Financial Information (Q4.1) and Work-splits (Q5.1), as these largely determine whether any additional questions apply.

Tip

Allocate responsibility for relevant sections and provide them with a timetable for return of the data to you.

Help-text throughout the proposal form can be Accessed simply by hovering your mouse over the blue  symbol.



Saving the form

The proposal form auto-saves every two minutes, but it is always a good idea to press the save button from time to time, to ensure your work has been saved.

You do not have to complete the form in one sitting: you can log in and out as many times as you like. If you plan to work on the form for a sustained period, tick the 'keep me logged in' option at the log-in screen, though you will get an alert if you are logged out after a period of inactivity.

Submitting the form

Once you have completed the form, and there are no material errors preventing submission, you will be given the opportunity to 'Submit and proceed to declaration'.

You will be required to confirm the accuracy of the data included.

You will receive an acknowledgement immediately the form has been received by us. If you submit the form before insurers will accept it, it will be held pending the relevant submission date (anticipated as 1st September). You will receive a reminder on that date to recheck that the information contained in the form is still fully up-to-date and accurate, and then be able to proceed to submission of the form.

Completing the renewal

You will receive your quotation by email with a link to the online portal. The renewal process will be concluded online – and your insurance documents will be uploaded onto your secure client portal for any time access.

Need more help?

If you need in-person assistance with any aspect of your renewal application, call us.

Your Account Manager's details are noted on your client portal – or you can contact the Master Policy switchboard: **0131 345 5599** between the hours of 9am and 5pm Monday to Friday.