ESTATE PLANNING FOR LIFE

myHelp

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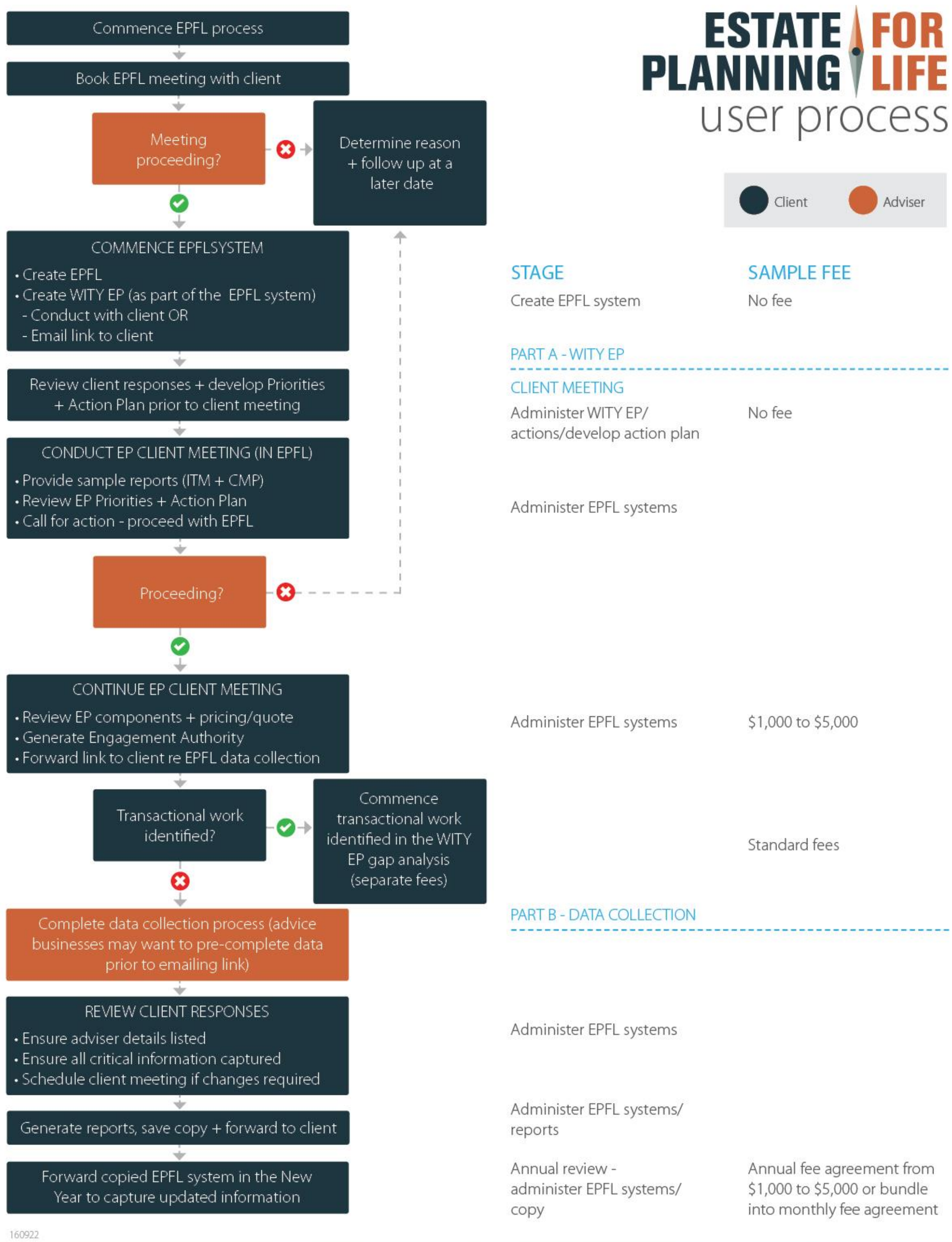
The Estate Planning For Life (EPFL) module provides an efficient way to guide clients through the Estate Planning (EP) process. The flowchart below provides an overview of the process.



Estate planning for Life offers two options for subscribers:

- **EPFL system** which encompasses WITY EP and the ‘Information that Matters’ vault
- **EPFL Lite** which is a short form Estate planning solution for less complex clients

1. terminology + abbreviations

The following abbreviations are used throughout this myHelp document:

EPFL – Estate Planning For Life
ITM – Information that Matters
WITY EP – What's Important to You Estate Planning
(Personal diagnostic, gap analysis and referral module for Estate Planning)

The following terms and their definitions are used throughout this myHelp document:

- Administer – action to create, view, edit or delete an MYP function e.g. client, service provider, survey etc
- Assistant – staff who access MYP as an assistant to other staff
- Client – clients of the subscriber who uses MYP under instruction from subscriber staff
- Contacts – individuals linked to a client (e.g. staff, advisers etc) or clients who are individuals (e.g. not linked to a client organisation)
- MYP Champion - person appointed by an MYP subscriber to ensure that MYP modules are integrated into the organisations standard operating procedures and that all relevant staff are trained and actively using these modules
- Role - positions applied to staff and referral partners
- Staff – staff employed by the subscriber who access MYP
- Subscriber – an organisation that has subscribed to MYP

1.1 ICON DICTIONARY

Module	Icon			
Support Centre				
	myTraining	myHelps	myTickets	Lodge ticket

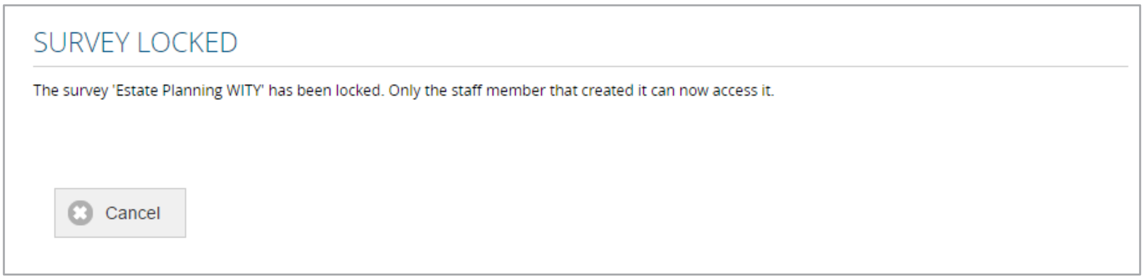
2. staff permissions

EPFL provides access for all staff who have been given permission to the EPFL Dashboard. By default, this permission is turned off. This permission is managed and drawn directly from ARM/Administration/ Staff. Refer to section the ARM Connect + Lite myHelp, the ARM + ARM Pro Get Started myHelp, or ARM myTraining in the Support Centre.

EPFL Permission	Functionality	Recommended Permission E = Executive M = Manager S = Staff
Dashboard	Access to EPFL dashboard	E M

2.1 EPFL PRIVATE

Marking an EPFL system private means that only the user who created the system has access. 'EPFL Private' is an option only visible to the user who created the system. If a staff member or client tries to access a system locked to someone other than themselves, they are automatically redirected to this page:



2.2 CLIENT LOGIN

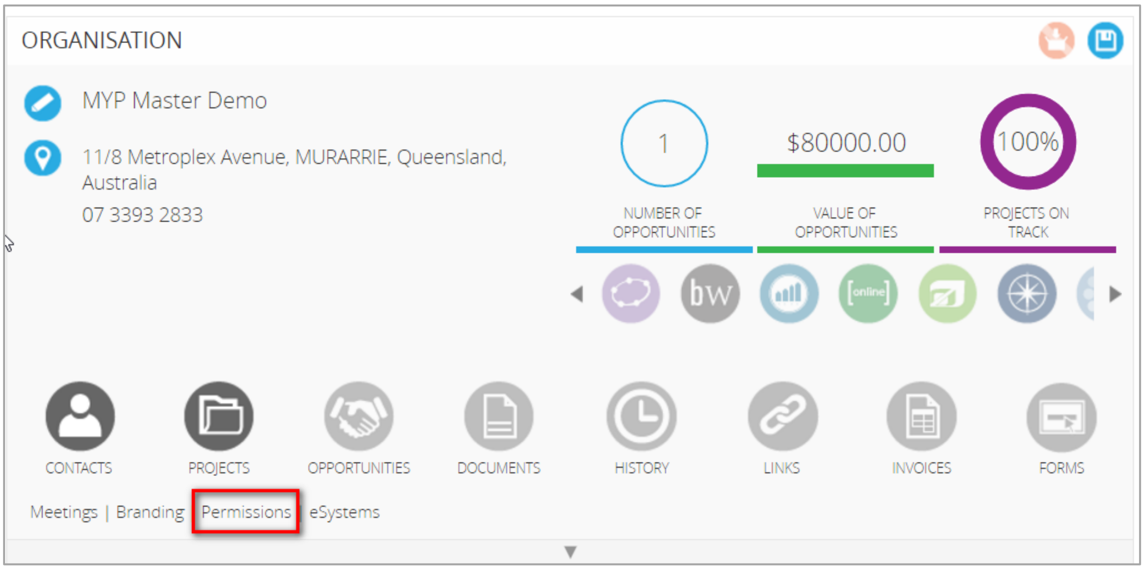
There is an option to add an additional secure client login to an EPFL System. This means that when a link to either the WITY EP or the ITM is accessed the client is required to login.

- Click the status option
- Set the 'Secure client login' option to 'Yes'

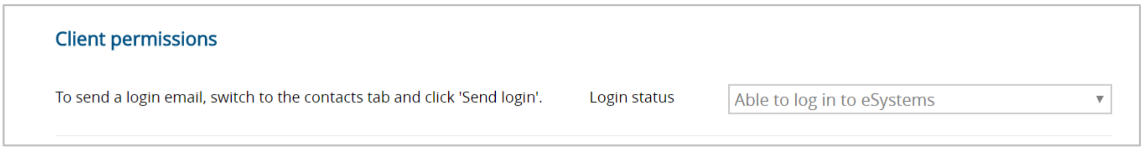
The client will be directed to login when they access the links to their EPFL system.

To provide the client with limited access to MYP:

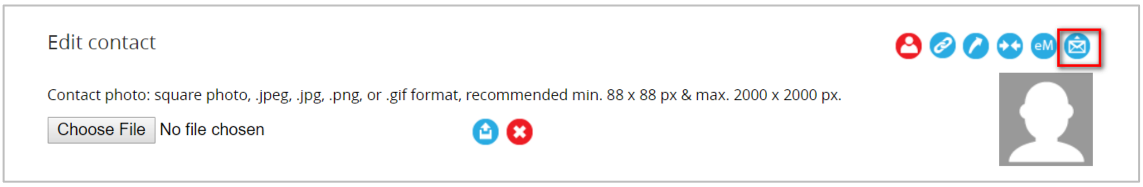
- Identify the relevant client via search
- Select 'Permissions'



- Amend the login status to 'able to log in to eSystems'



- Select 'Save
- Identify the relevant client and select edit



- Identify the relevant contact and select 'Send login' to provide the client with their login details

NB: This option is only available for subscribers with ARM or ARM Pro.

3. administer EPFL details + quote

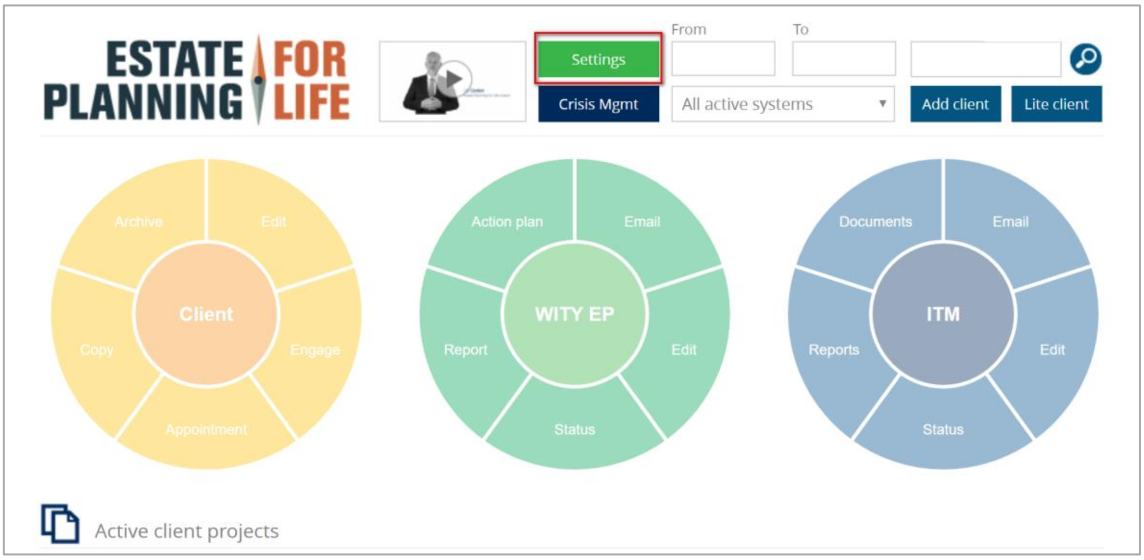
3.1 CREATE EPFL USER DETAILS

NB. This needs to be customised in order for the details to appear in the EPFL system otherwise the relevant page will appear blank.

NB. It is recommended that only one customised version be created, otherwise the EPFL system will only refer to the most recent version created.

To set up your service offering, location and quotation details:

- Select 'Settings'



- Enter details as per the following screenshot

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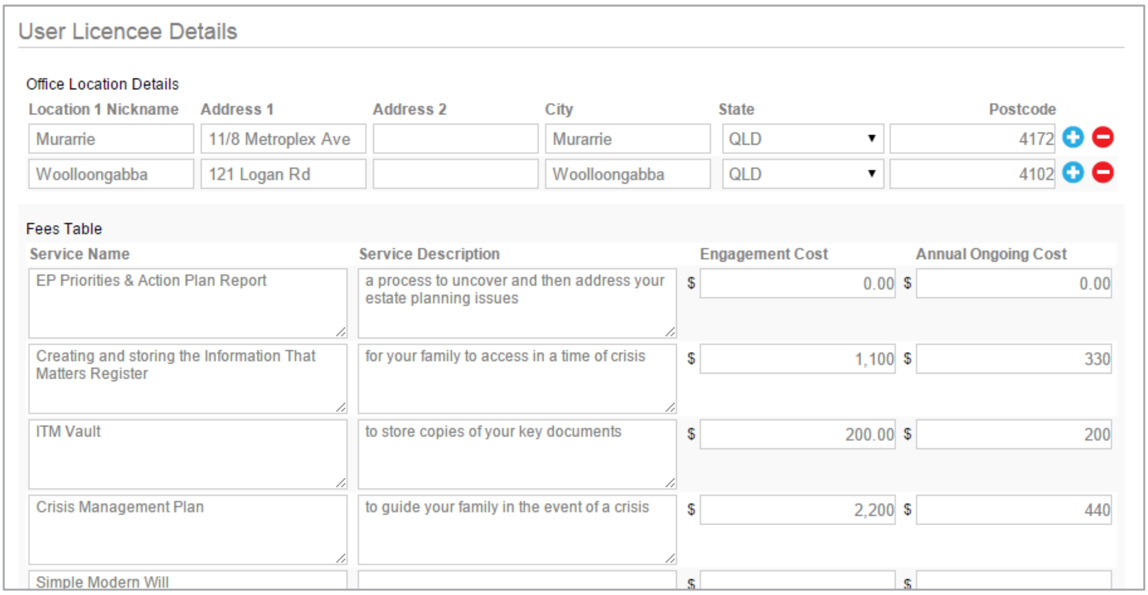
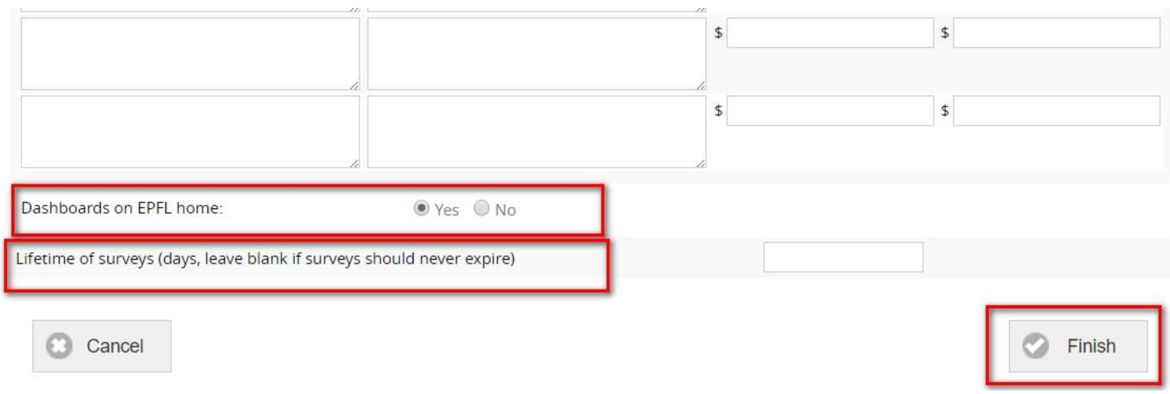


- Select whether to show or hide the Dashboard on the EPFL homepage
- Insert the number of days for the life of the survey
- Select 'Finish'



3.2 ADMINISTER EPFL USER DETAILS

Once the above details and quote have been created it is easy to administer and update the details. To administer/edit your details and quotation:

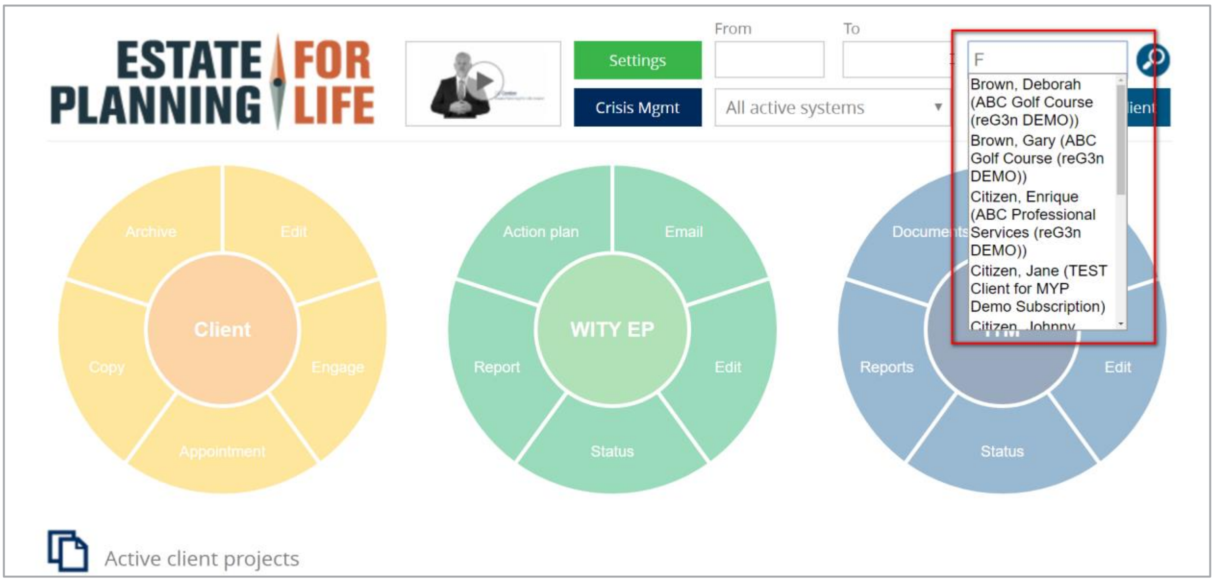
- Select 'Settings'
- Edit as required and select 'Finish'

4. administer the EPFL system

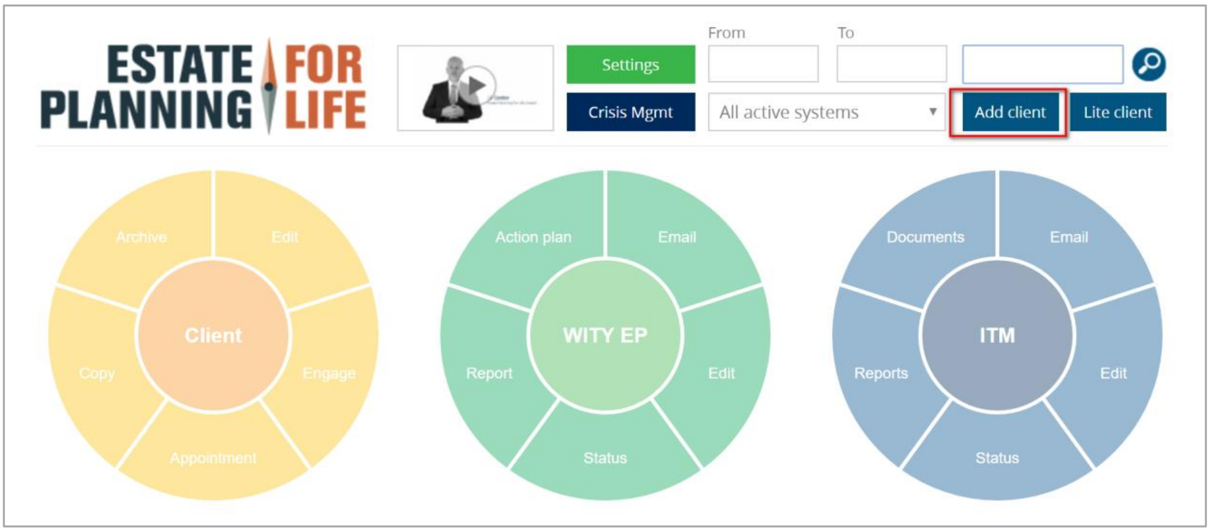
4.1 CREATE AN EPFL SYSTEM

To create an EPFL system for an existing client:

- Begin to type client name in the auto-complete box
- Select the relevant client from the drop-down selection



- If the client is not already in ARM, select 'Add client'



- Complete the prompts on the pop-up box

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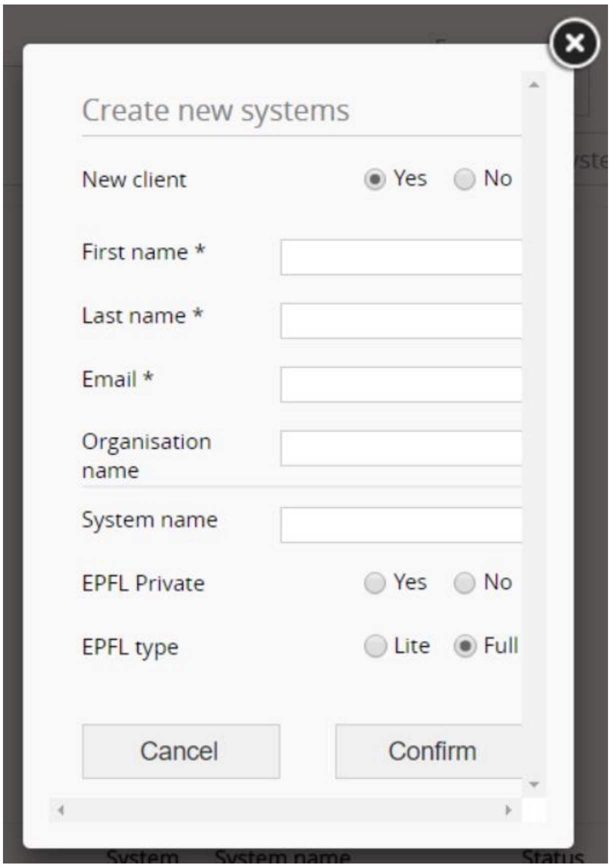
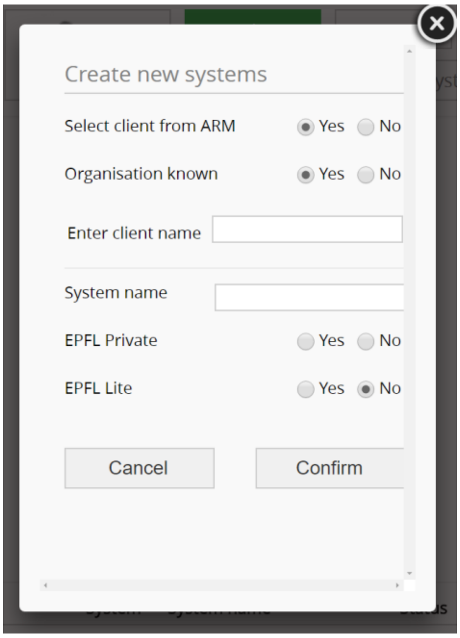


- Select client from ARM - 'Yes'
- Complete the prompts on the pop-up box

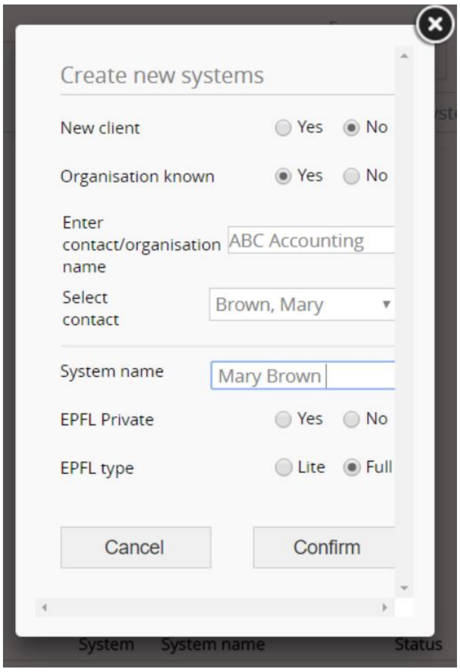


NB: Selecting EPFL Private allows an EPFL system to be locked to the creating staff member. This is the best setting if a staff member wishes to create a system that other staff cannot access.

NB: Selecting EPFL Lite creates short form Estate planning solution for less complex clients

NB: Each system name must be unique. An error message will appear prompting a change to the system name if necessary.

- Selecting 'No' will create a prompt to add a new client

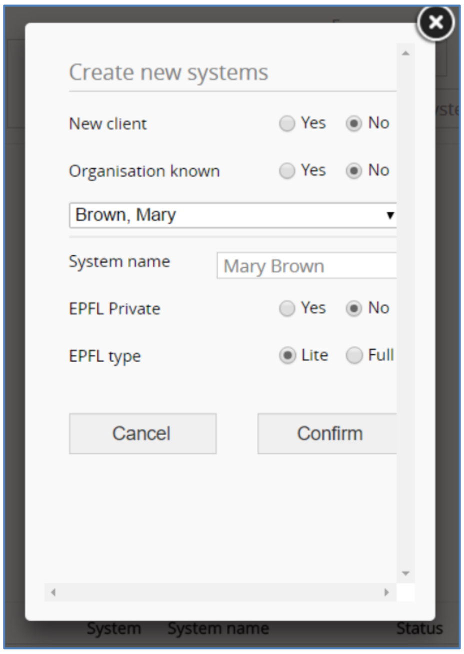


4.2 CREATE AN EPFL LITE SYSTEM

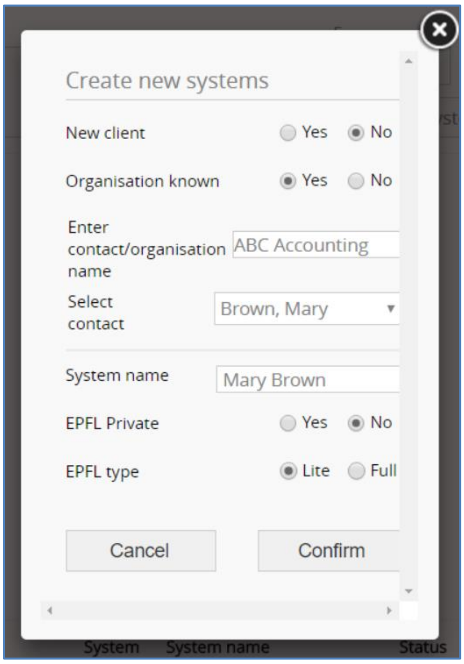
To create an EPFL Lite system follow the same steps for creating an EPFL System

- Select 'Yes for EPFL Lite

NB: For an existing client, the following pop-up screen will appear:

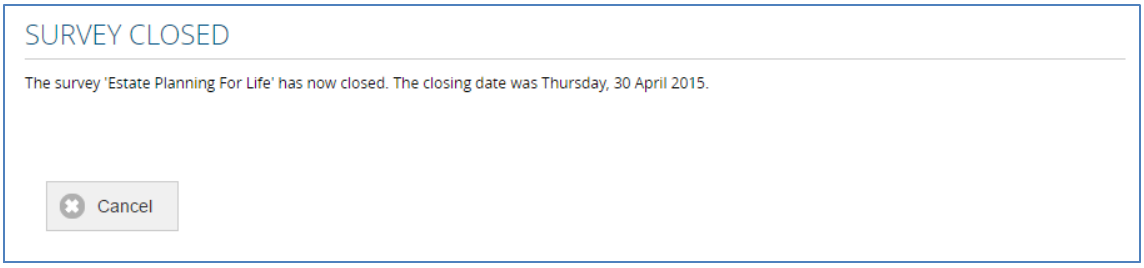


NB: For a new client, the following pop-up screen will appear:



For either screen, select 'Confirm'.

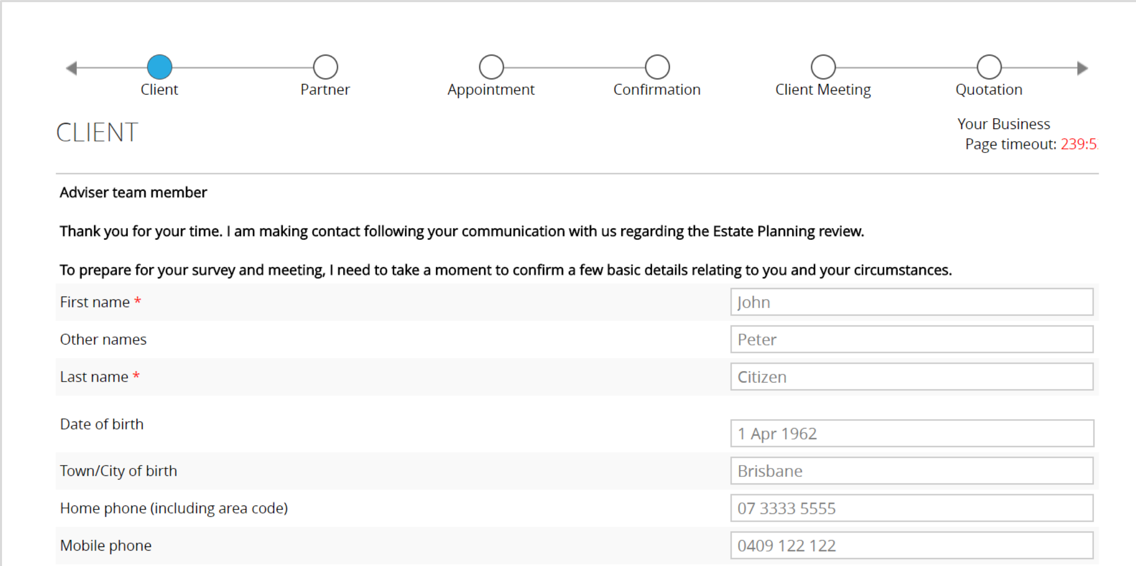
NB: Systems are locked after 90 days. If a client tries to access a system that has been locked, the following screen appears.



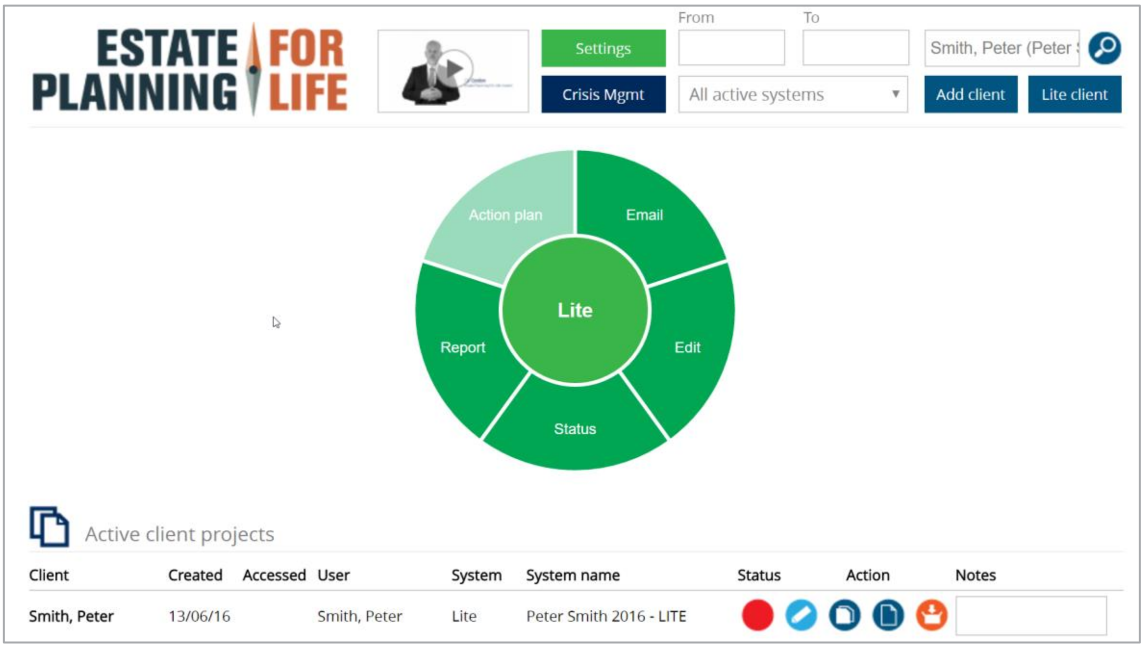
If a survey has been locked, a new system will need to be created.

4.3 COMMENCE AN EPFL LITE SYSTEM

Once the client has been selected/created, the following screen is created and the system can be commenced.

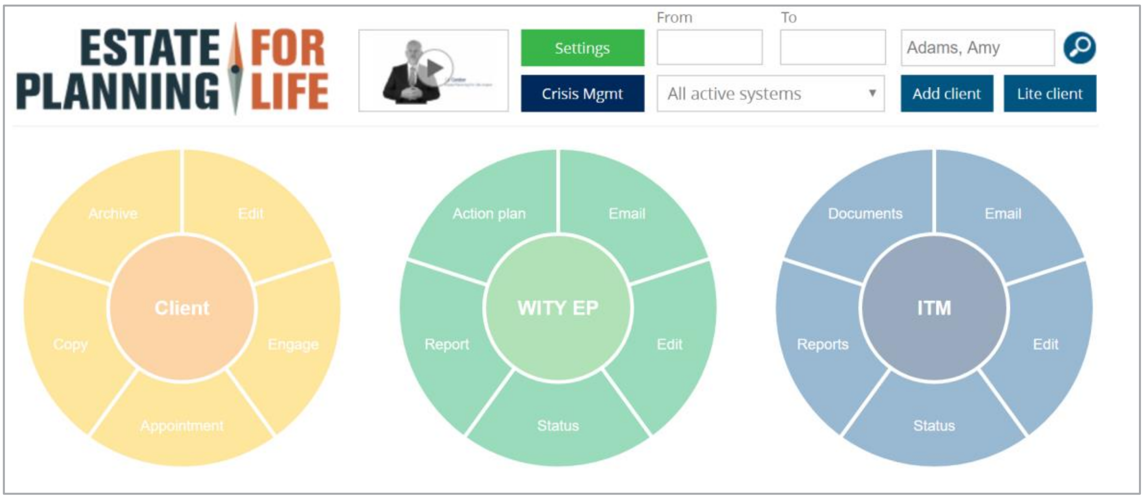


Complete the details and select 'Save + close'.



4.4 COMMENCE AN EPFL SYSTEM

Once the client has been selected/created, the 'New' section of the 'Client' pie-chart becomes available to click. To commence the EPFL system, click 'New'.

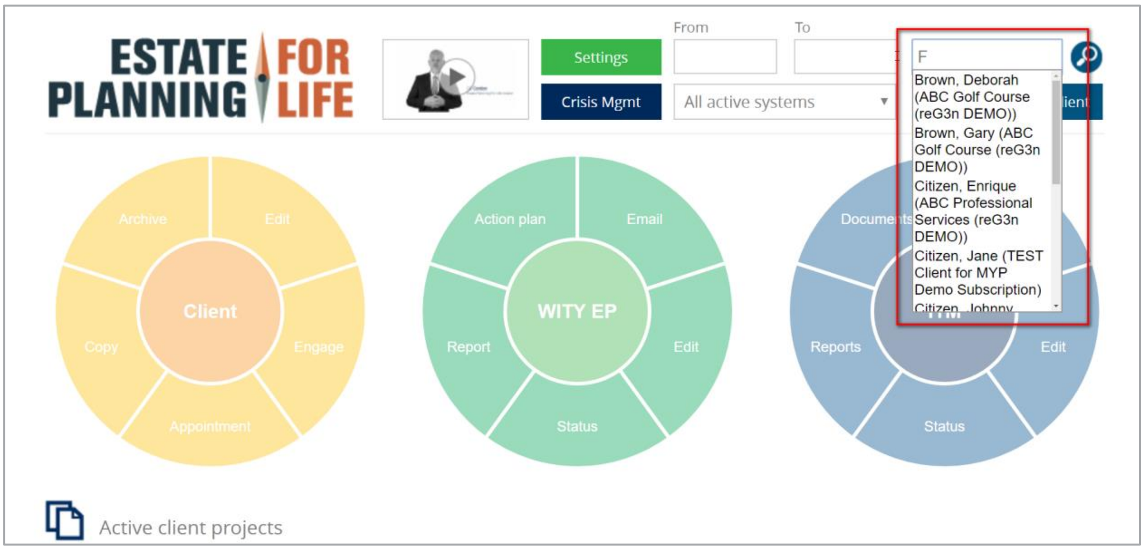


Once an EPFL system has been created and 'Next' selected, the first few pages are to be completed by the Adviser (Client, Partner details etc.) including setting the next appointment with the client for the review of the WITY EP survey results after completion.

4.5 ACCESS AN EPFL SYSTEM

To access an existing EPFL system for a client:

- Begin to type client name in the auto-complete box
- Select the relevant client from the drop-down selection
- Select the relevant status from the drop-down box and click the 'Search' button



- The list of client systems will appear below the pie-charts
- Select the relevant client and click on the 'Client' name or click the 'Edit' button

Client	Created	Accessed	User	System	System name	Status	Action	Notes
Brown, Peter	13/06/16		Brown, Peter	ITM	Peter Brown 2016			
Jenkins, Peter	13/06/16		Jenkins, Peter	WITY EP	Peter Jenkins 2016 - WITY EP			
Smith, Peter	13/06/16		Smith, Peter	Lite	Peter Smith 2016 - LITE			

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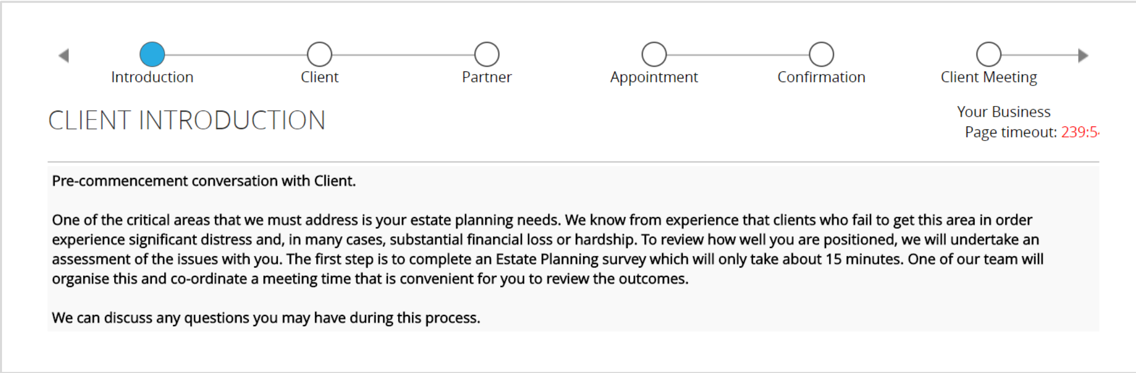
4.6 COMPLETE THE WITY EP

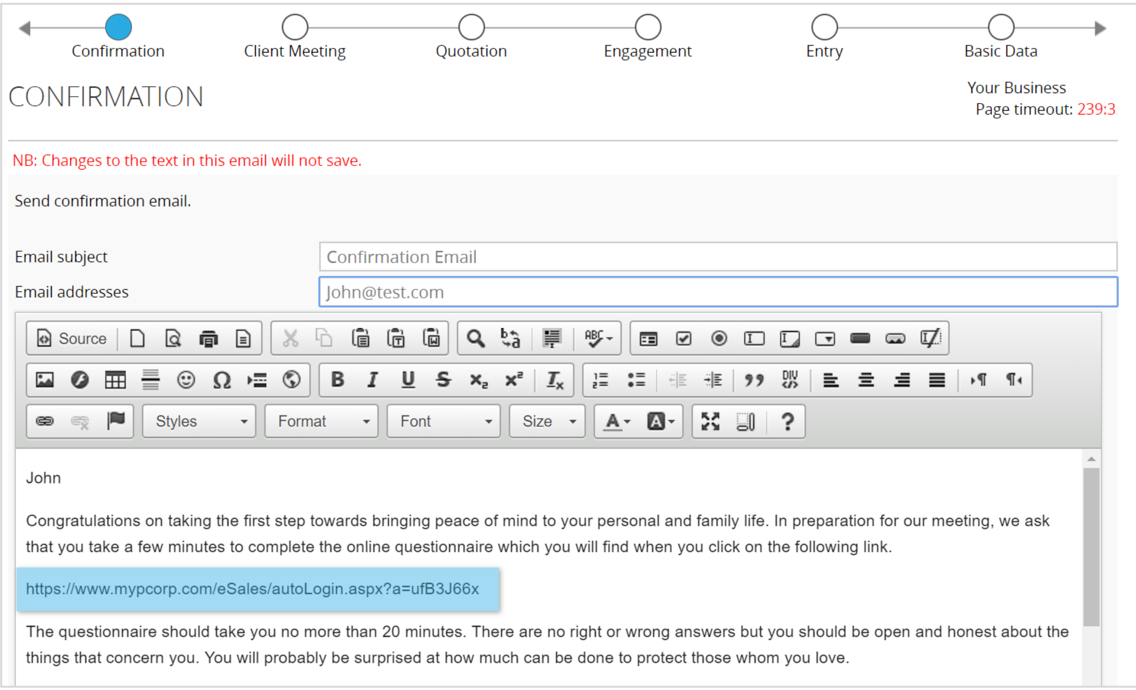
Once an EPFL system has been created and 'Next' selected, the first few pages are to be completed by the Adviser (Client, Partner details and Appointment), including setting the next appointment with the client to the review of the WITY EP survey results after completion.



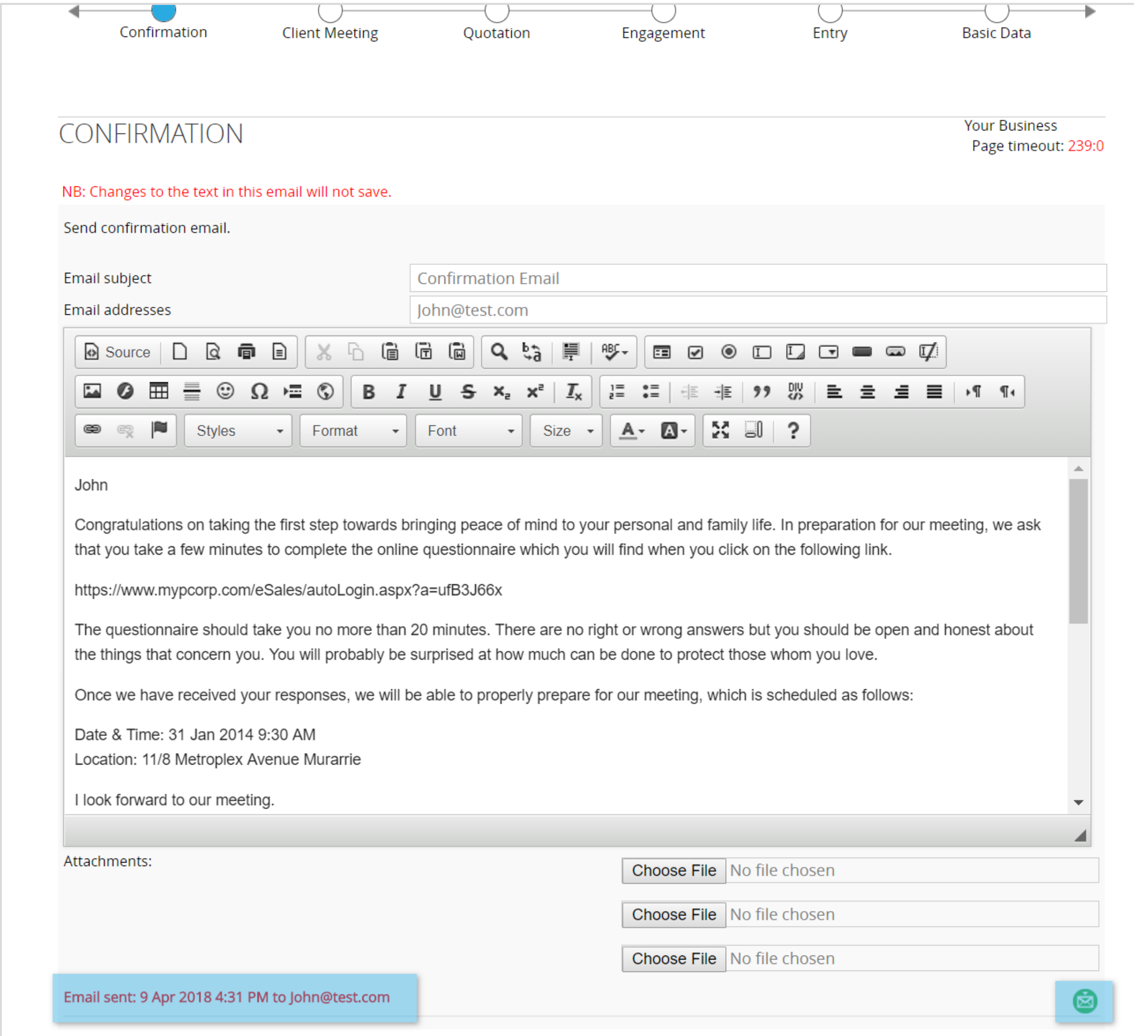
4.7 PROVIDE ACCESS TO THE WITY EP

The WITY EP system is automatically created for the client on commencement of an EPFL system for the client.

Option 1 - Select 'Access' to complete the survey with the client. This option can also be accessed by selecting the client on the EPFL home page and clicking 'Edit' in the WITY EP pie-chart.
Option 2 - Select 'Next' to proceed to the next page where the link to the WITY EP can be emailed to the client. This option can also be accessed by selecting the client on the EPFL home page and clicking 'Email' in the WITY EP pie-chart.



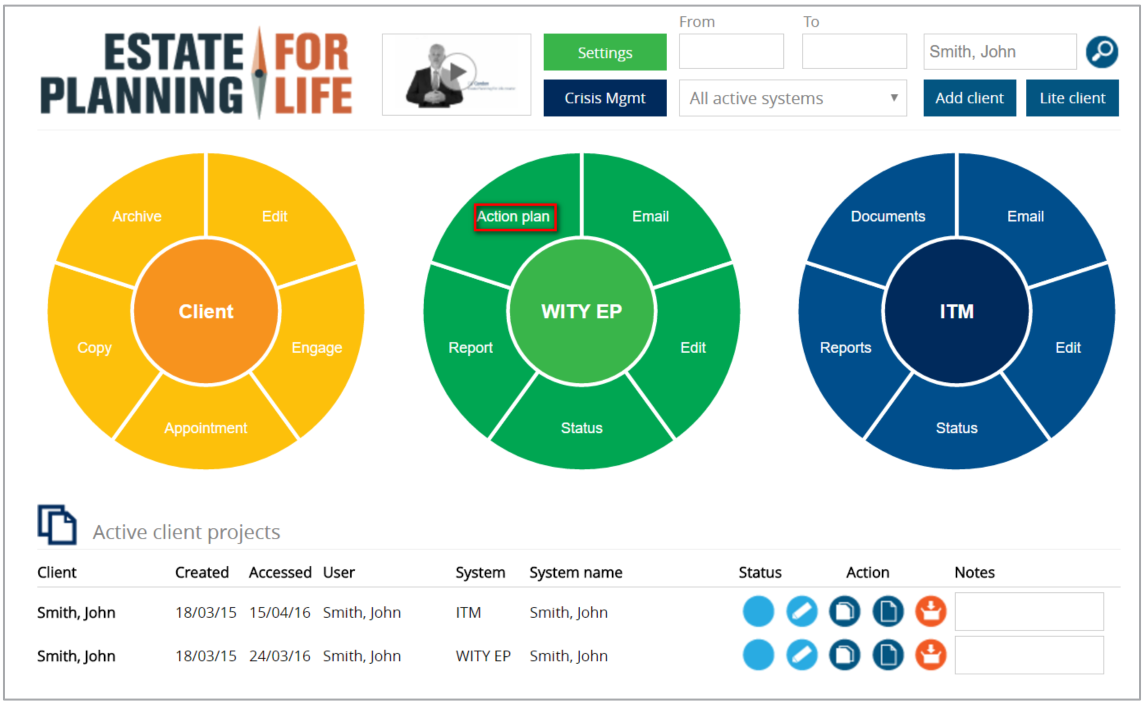
NB: The 'Send email' icon must be clicked for email to send. Notification of the time and date sent will appear in the left hand side of the screen.



4.8 REVIEW WITY EP RESULTS AND PREPARE FOR CLIENT MEETING

To review the WITY EP results in preparation for the client meeting:

- Select the relevant client from the drop-down selection
- Select the relevant status from the drop-down box and click the 'Search' button
- Select 'Action Plan' in the WITY EP pie-chart



- Review the results and develop recommendations in preparation for the client meeting

4.9 CONDUCT CLIENT MEETING

Once the WITY EP has been completed and the adviser has reviewed the issues, the client meeting is conducted and the WITY EP results reviewed. The following steps are recommended:

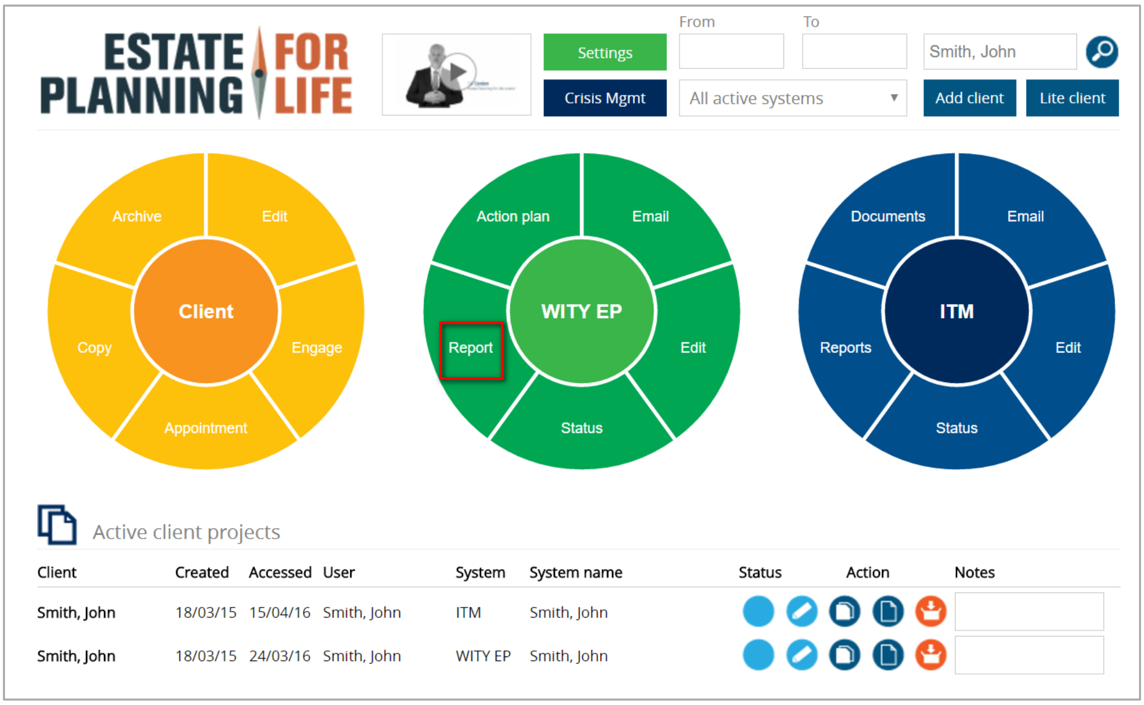
4.10 REVIEW WITY EP RESULTS WITH CLIENT

Repeat step 1 above with the client and discuss relevant actions and agreed actions.

4.11 GENERATE PRIORITIES + ACTION PLAN REPORT

To generate the report:

- Search for the relevant client and select 'Report' in the WITY EP pie-chart
- Select 'Priorities + Action Plan Report' in the drop-down box
- Select 'Confirm'



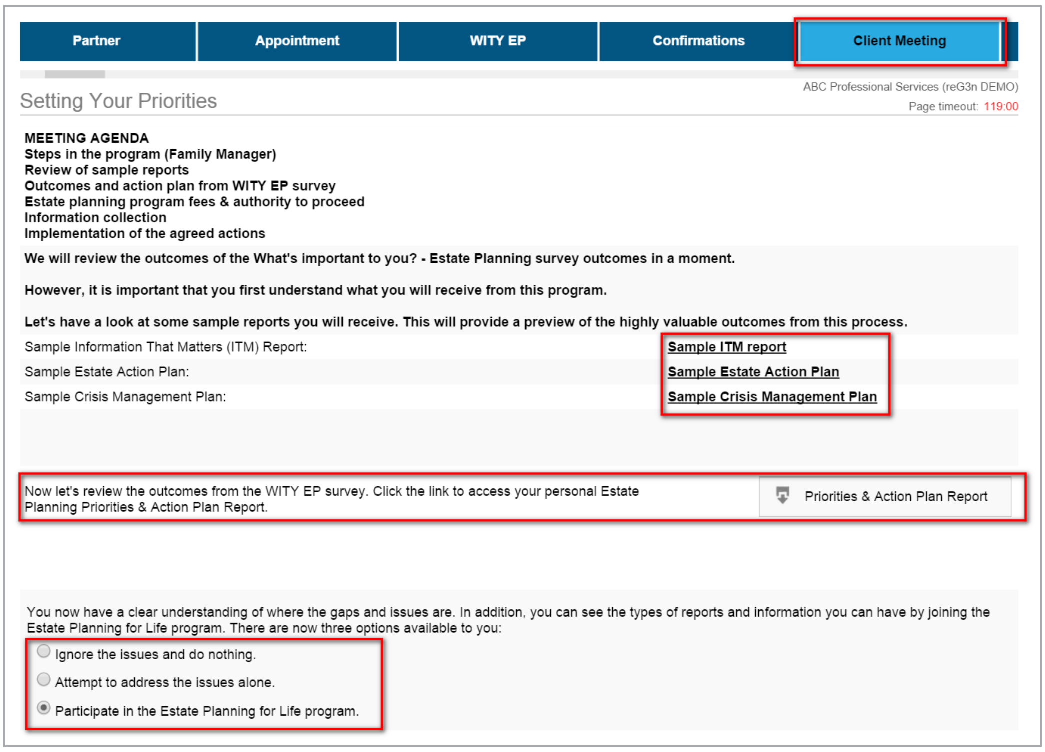
4.12 DEMONSTRATE EPFL VALUE AND OBTAIN CLIENT COMMITMENT

At the Client meeting, sample reports should be presented to the client to demonstrate the high value documentation that will be available at the end of the EPFL process. These can be printed or viewed on screen. Refer the links in the screenshot below.

After the client has reviewed WITY EP results and the sample reports the client selects the relevant action option – ignore the issue, go it alone or commence the EPFL process.

To obtain client commitment:

- Search for the relevant client and click the 'Edit' button
- Navigate to the 'Client Meeting' page


Partner | Appointment | WITY EP | Confirmations | Client Meeting

ABC Professional Services (reG3n DEMO)
Page timeout: 119:00

Setting Your Priorities

MEETING AGENDA
Steps in the program (Family Manager)
Review of sample reports
Outcomes and action plan from WITY EP survey
Estate planning program fees & authority to proceed
Information collection
Implementation of the agreed actions

We will review the outcomes of the What's important to you? - Estate Planning survey outcomes in a moment.

However, it is important that you first understand what you will receive from this program.

Let's have a look at some sample reports you will receive. This will provide a preview of the highly valuable outcomes from this process.

Sample Information That Matters (ITM) Report:	**Sample ITM report**
Sample Estate Action Plan:	**Sample Estate Action Plan**
Sample Crisis Management Plan:	**Sample Crisis Management Plan**

Now let's review the outcomes from the WITY EP survey. Click the link to access your personal Estate Planning Priorities & Action Plan Report.

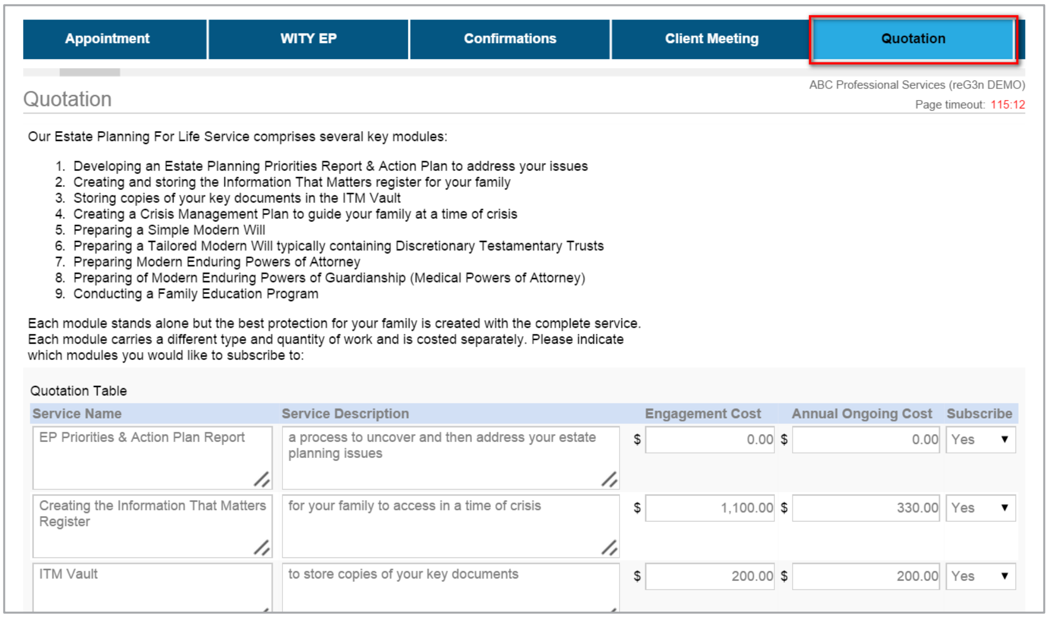
Priorities & Action Plan Report

You now have a clear understanding of where the gaps and issues are. In addition, you can see the types of reports and information you can have by joining the Estate Planning for Life program. There are now three options available to you:

- Ignore the issues and do nothing.
- Attempt to address the issues alone.
- Participate in the Estate Planning for Life program.

4.13 PREPARE QUOTATION AND GENERATE ENGAGEMENT AUTHORITY

Once the relevant actions have been identified, the Adviser prepares the quotation (based on the structure completed in section 1 above) and generates the Engagement Authority.


Appointment | WITY EP | Confirmations | Client Meeting | Quotation

ABC Professional Services (reG3n DEMO)
Page timeout: 115:12

Quotation

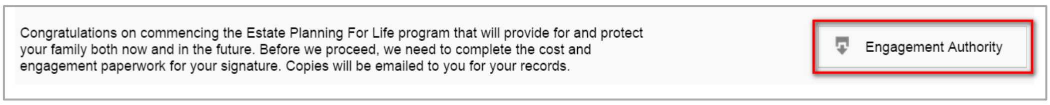
Our Estate Planning For Life Service comprises several key modules:

1. Developing an Estate Planning Priorities Report & Action Plan to address your issues
2. Creating and storing the Information That Matters register for your family
3. Storing copies of your key documents in the ITM Vault
4. Creating a Crisis Management Plan to guide your family at a time of crisis
5. Preparing a Simple Modern Will
6. Preparing a Tailored Modern Will typically containing Discretionary Testamentary Trusts
7. Preparing Modern Enduring Powers of Attorney
8. Preparing of Modern Enduring Powers of Guardianship (Medical Powers of Attorney)
9. Conducting a Family Education Program

Each module stands alone but the best protection for your family is created with the complete service. Each module carries a different type and quantity of work and is costed separately. Please indicate which modules you would like to subscribe to:

Quotation Table

Service Name	Service Description	Engagement Cost	Annual Ongoing Cost	Subscribe
EP Priorities & Action Plan Report	a process to uncover and then address your estate planning issues	$ 0.00	$ 0.00	Yes
Creating the Information That Matters Register	for your family to access in a time of crisis	$ 1,100.00	$ 330.00	Yes
ITM Vault	to store copies of your key documents	$ 200.00	$ 200.00	Yes

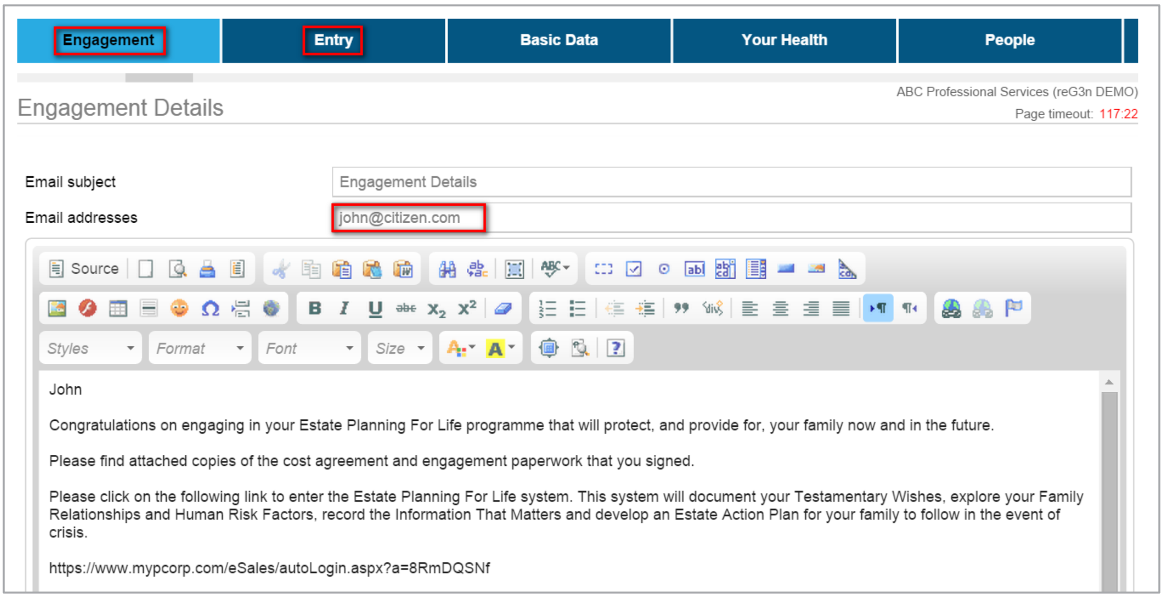

Congratulations on commencing the Estate Planning For Life program that will provide for and protect your family both now and in the future. Before we proceed, we need to complete the cost and engagement paperwork for your signature. Copies will be emailed to you for your records.

Engagement Authority

4.14 CLIENT COMMENCES GATHERING ITM

The Adviser can either email the ITM link to the client by sending the email from the 'Engagement' page or conduct the ITM with the client from the 'Entry' page.

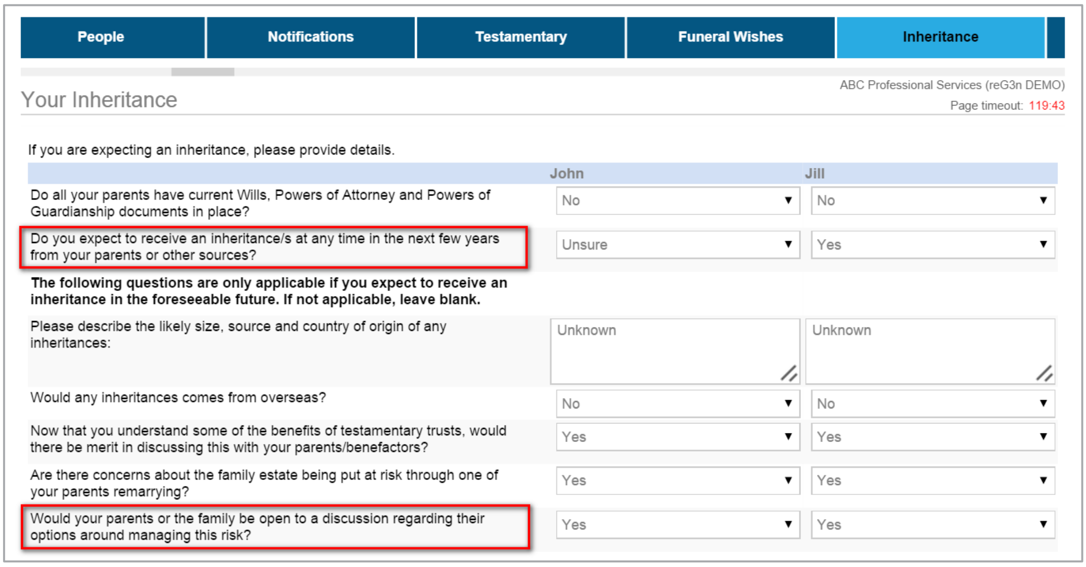
NB. If the client commences the ITM via email, they will enter the system at the 'Entry' page.



4.15 KEY COMPONENTS OF THE ITM PROCESS

Referral opportunity

Significant referral opportunities can be generated from the ITM process for the Adviser. Please note the following screenshot and ensure that this opportunity is captured in ARM/Opportunities for follow up action.



Advisers details

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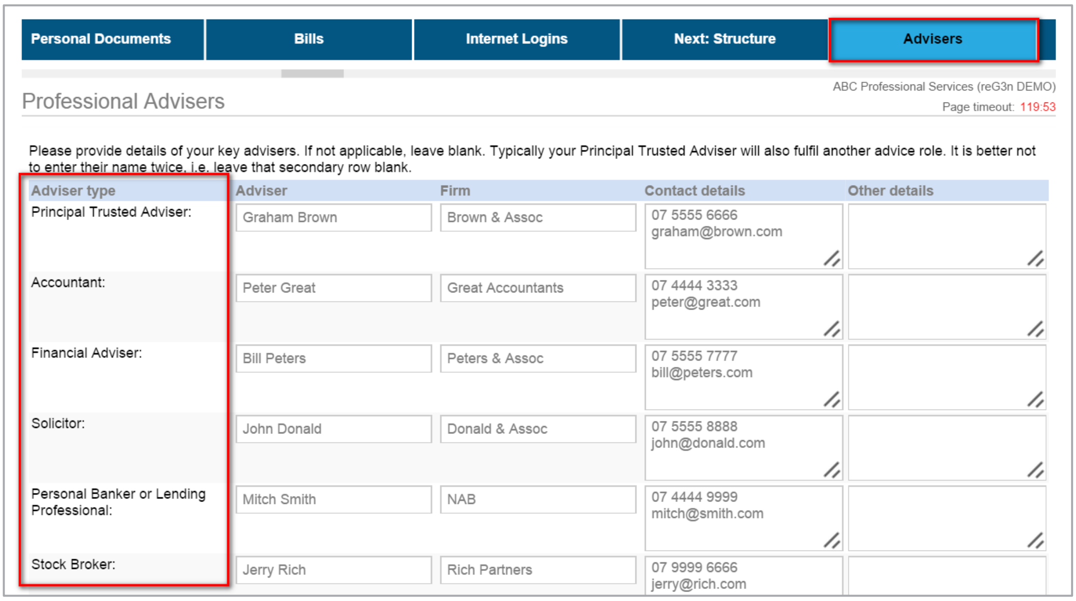
Information about the client's key advisers is collected early in the process and these details form the options in drop-down menus in later pages and in reports.



Personal Documents | Bills | Internet Logins | Next: Structure | Advisers

Professional Advisers

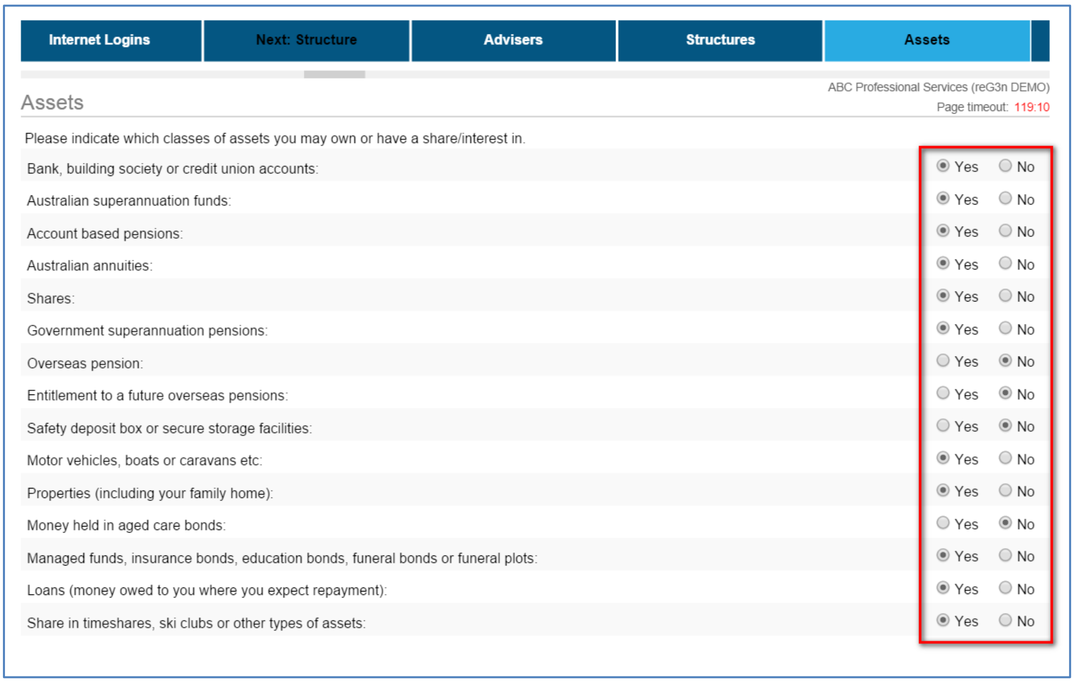
ABC Professional Services (reG3n DEMO)
Page timeout: 119:53

Please provide details of your key advisers. If not applicable, leave blank. Typically your Principal Trusted Adviser will also fulfil another advice role. It is better not to enter their name twice, i.e. leave that secondary row blank.

Adviser type	Adviser	Firm	Contact details	Other details
Principal Trusted Adviser:	Graham Brown	Brown & Assoc	07 5555 6666 graham@brown.com	
Accountant:	Peter Great	Great Accountants	07 4444 3333 peter@great.com	
Financial Adviser:	Bill Peters	Peters & Assoc	07 5555 7777 bill@peters.com	
Solicitor:	John Donald	Donald & Assoc	07 5555 8888 john@donald.com	
Personal Banker or Lending Professional:	Mitch Smith	NAB	07 4444 9999 mitch@smith.com	
Stock Broker:	Jerry Rich	Rich Partners	07 9999 6666 jerry@rich.com	

4.16 ITM CONTENT

Several of the early pages in the ITM process collect data about the client's circumstances. These selections ensure that only relevant pages appear later in the process and in the final reports.



Internet Logins | Next: Structure | Advisers | Structures | Assets

Assets

ABC Professional Services (reG3n DEMO)
Page timeout: 119:10

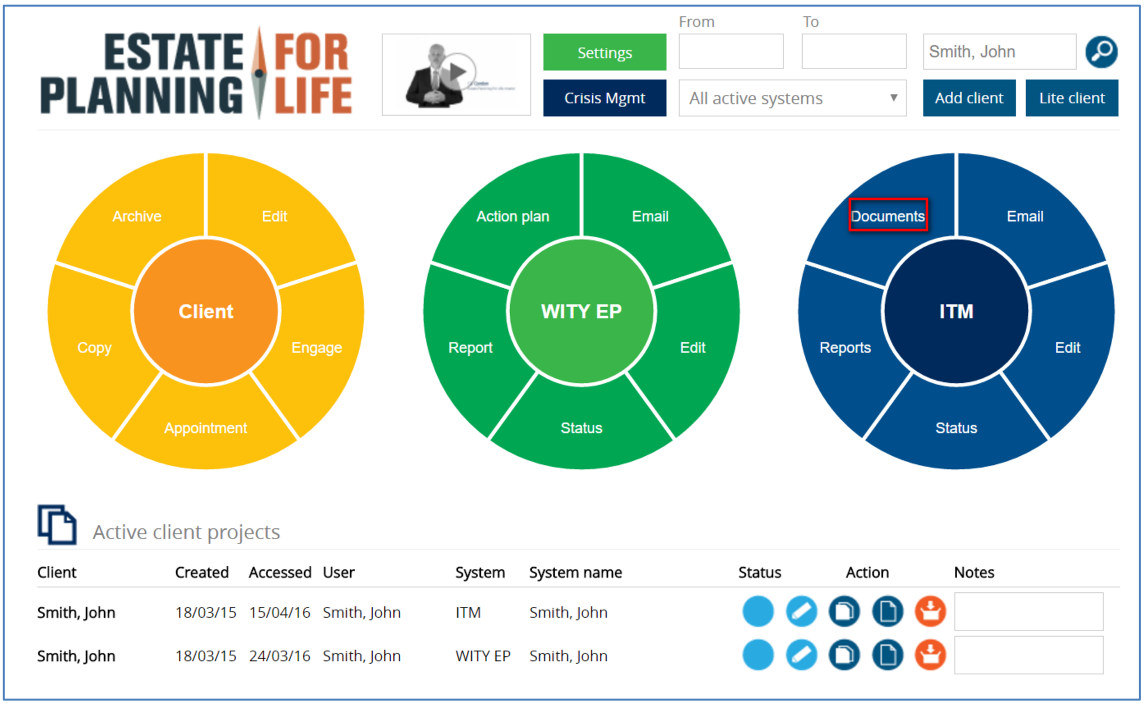
Please indicate which classes of assets you may own or have a share/interest in.

Asset class	Selection
Bank, building society or credit union accounts:	Yes
Australian superannuation funds:	Yes
Account based pensions:	Yes
Australian annuities:	Yes
Shares:	Yes
Government superannuation pensions:	Yes
Overseas pension:	No
Entitlement to a future overseas pensions:	No
Safety deposit box or secure storage facilities:	No
Motor vehicles, boats or caravans etc:	Yes
Properties (including your family home):	Yes
Money held in aged care bonds:	No
Managed funds, insurance bonds, education bonds, funeral bonds or funeral plots:	Yes
Loans (money owed to you where you expect repayment):	Yes
Share in timeshares, ski clubs or other types of assets:	Yes

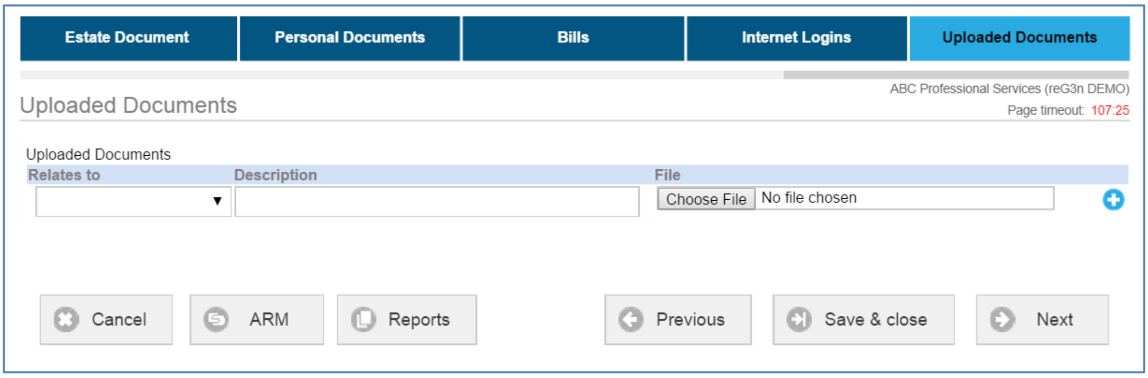
4.17 DOCUMENTS

EPFL provides the ability for advisers to upload documents relevant to the estate planning process for the client. To upload a document:

- Select ‘Documents’



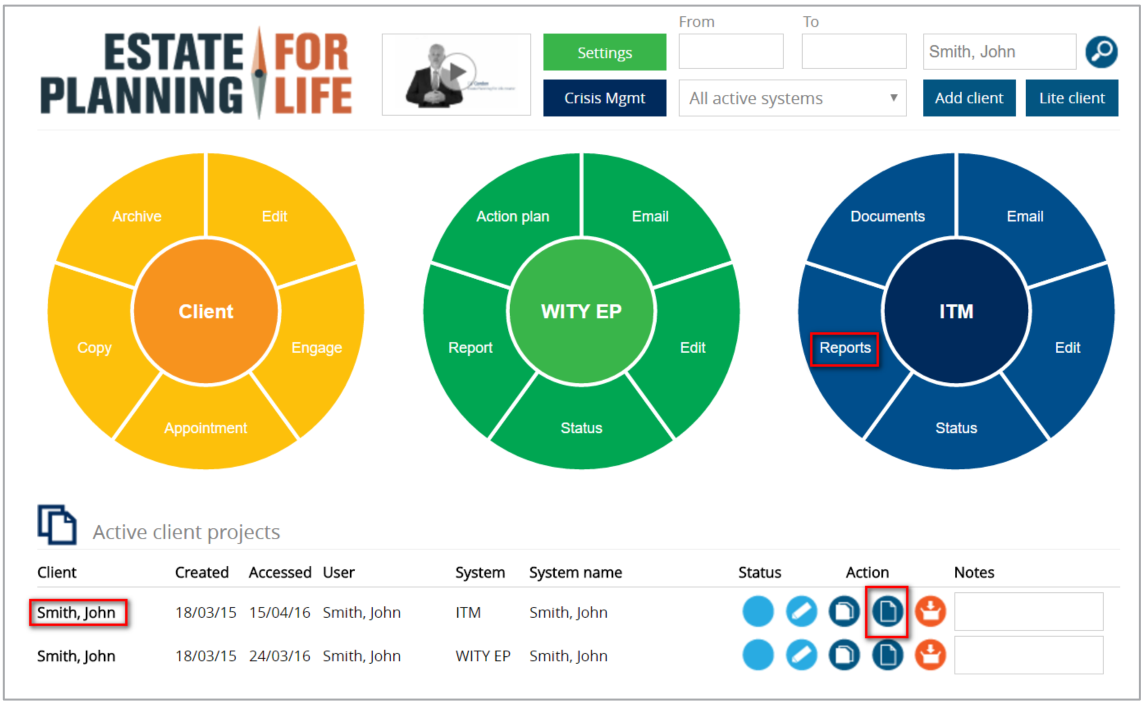
- Enter document details
- Select ‘Choose file’ to search for the document and select ‘Save’



4.18 GENERATE REPORTS

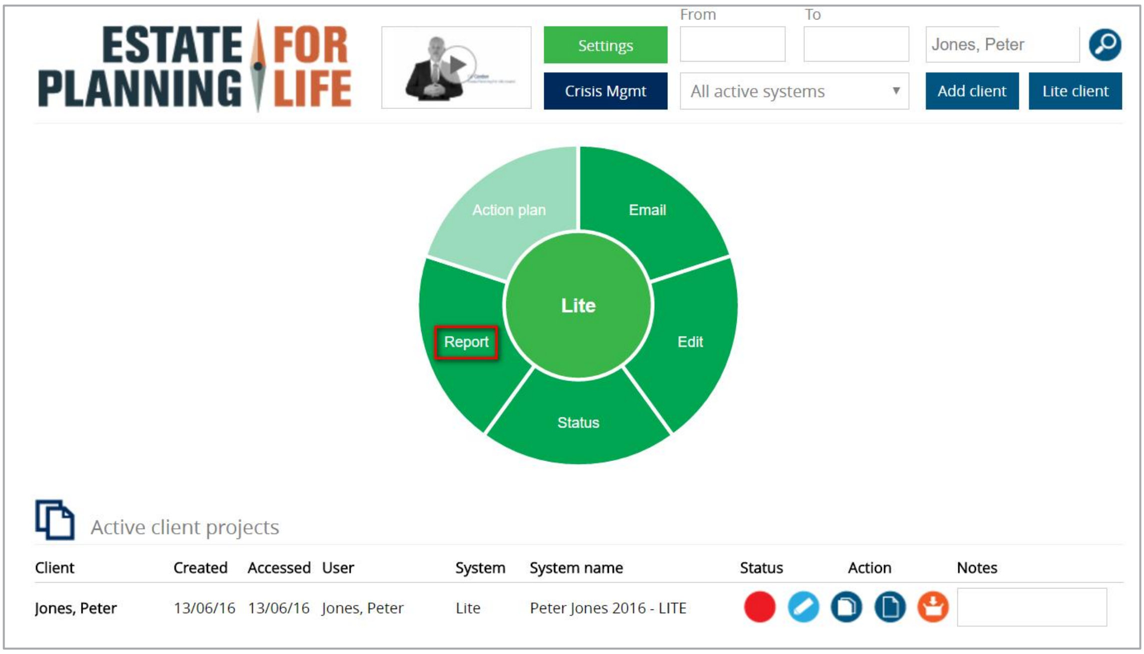
Following completion of the ITM data collection a range of client reports can be generated. To generate these reports:

- Search for the relevant client
- Select ‘Reports’ from the ITM pie chart or click on the ‘Report’ button for the relevant client
- Select ‘Report’ from the EPFL Lite pie chart for the relevant client.



A summary of the key reports and features include:

- Information That Matters Report – register of information that family and professionals need to assist with estate matters including people, structures, documents, assets, debts, insurances, legal responsibilities etc.
- Crisis Management Report – an action plan for the family to follow at a time of crisis providing guidance regarding:
    - What do I need to know?
    - Who do I call?
    - What do I ask them?
    - What is important?
    - What is urgent and what can wait?
- Estate Planning Record – an automated extract of key issues identified from the EPFL system and can be used as a briefing note for other professionals (e.g. solicitor)

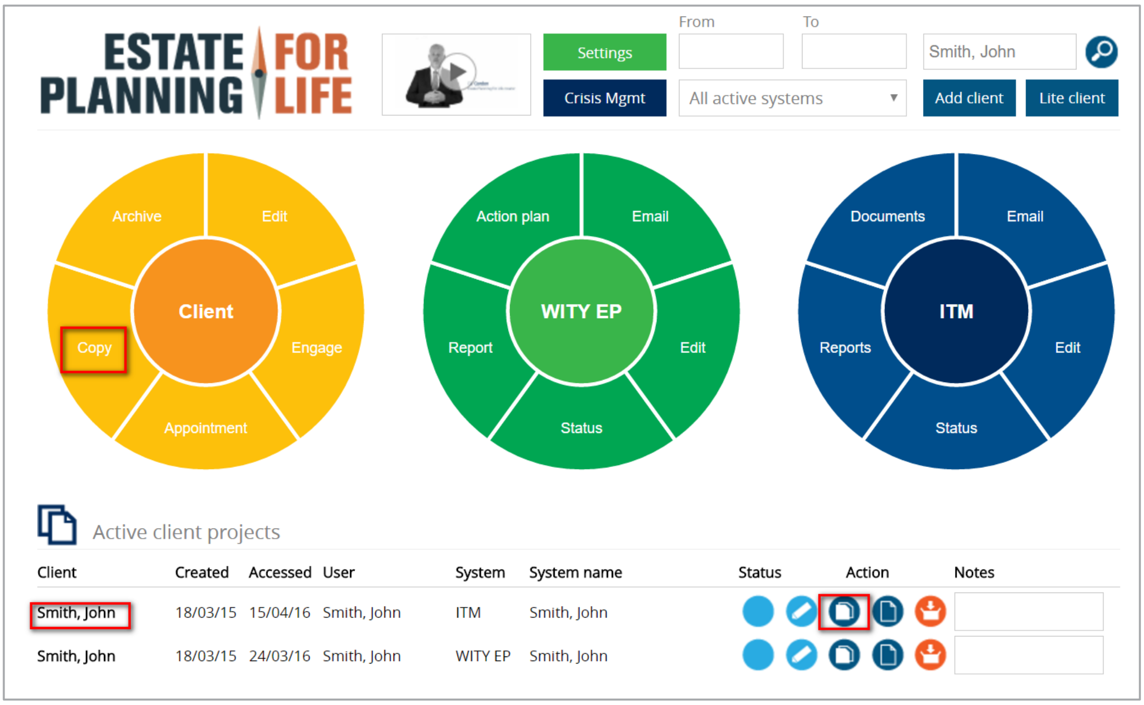


- Estate Planning Priorities Report + Action Plan (EPFL Lite only) - an analysis of the priorities and issues identified within the WITY EP survey component and an outline of the scheduled actions and timeframes to be completed by the agreed service provider

4.19 COPY AN EPFL SYSTEM

To update a client's EPFL system annually (or at the agreed update time), a copy of the system can be made for updating purposes:

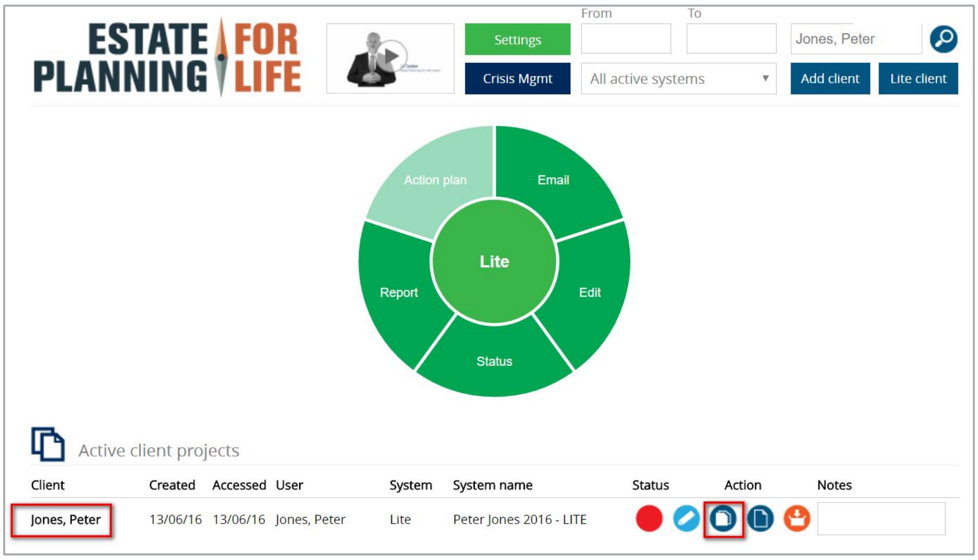
- Search for the relevant client
- Select 'Copy' from the Client pie-chart or click on the 'Copy' button for the relevant client
- Rename the system and select 'Confirm'



- The new system can be edited as required and new reports generated.

To copy an EPFL Lite system

- Search for the relevant client
- Select 'Copy' button for the relevant client
- Rename the system and select 'Confirm'



4.20 ARCHIVE AN EPFL SYSTEM

To archive an EPFL system:

- Search for the relevant client

- Select 'Archive' from the Client pie-chart or click on the 'Archive' button for the relevant client
- Select 'Confirm'

4.21 UNARCHIVE AN EPFL SYSTEM

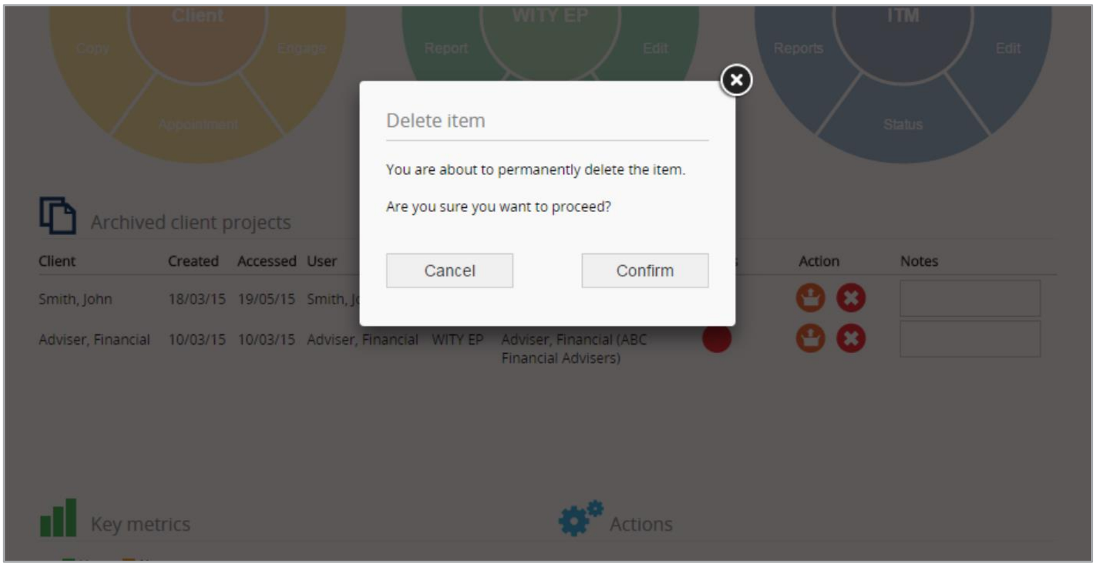
To unarchive an EPFL system:

- Set the status to 'Archived'
- Search for the relevant client
- Click on the 'Unarchive' button for the relevant system
- Select 'Confirm'

4.22 DELETE AN EPFL SYSTEM

To permanently delete an EPFL system:

- Set the status to 'Archived'
- Search for the relevant client
- Click on the 'Delete' button for the relevant system
- A warning pop-up box will appear
- Select 'Confirm' to delete or Cancel to cancel the deletion process

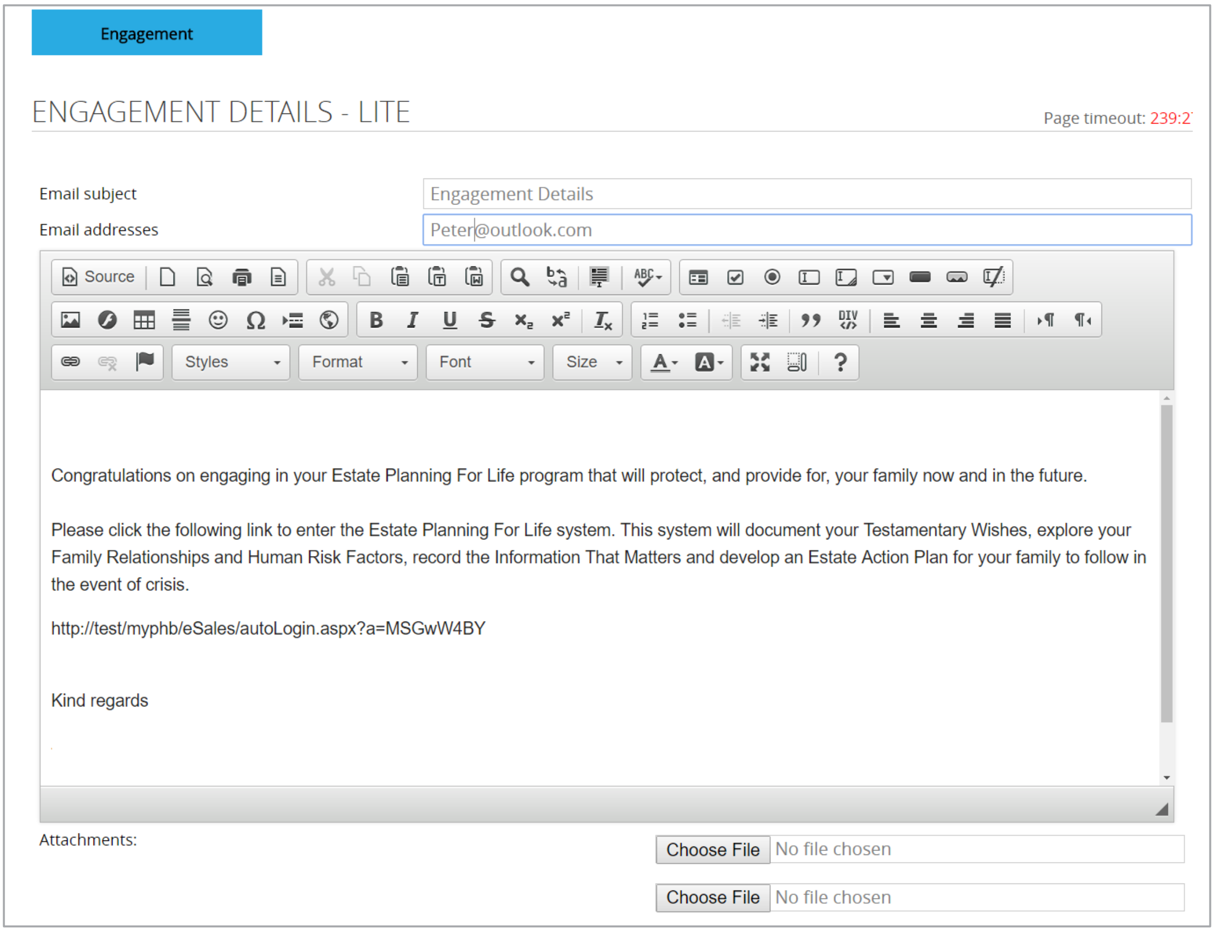


4.23 COMPLETE AN EPFL LITE SYSTEM

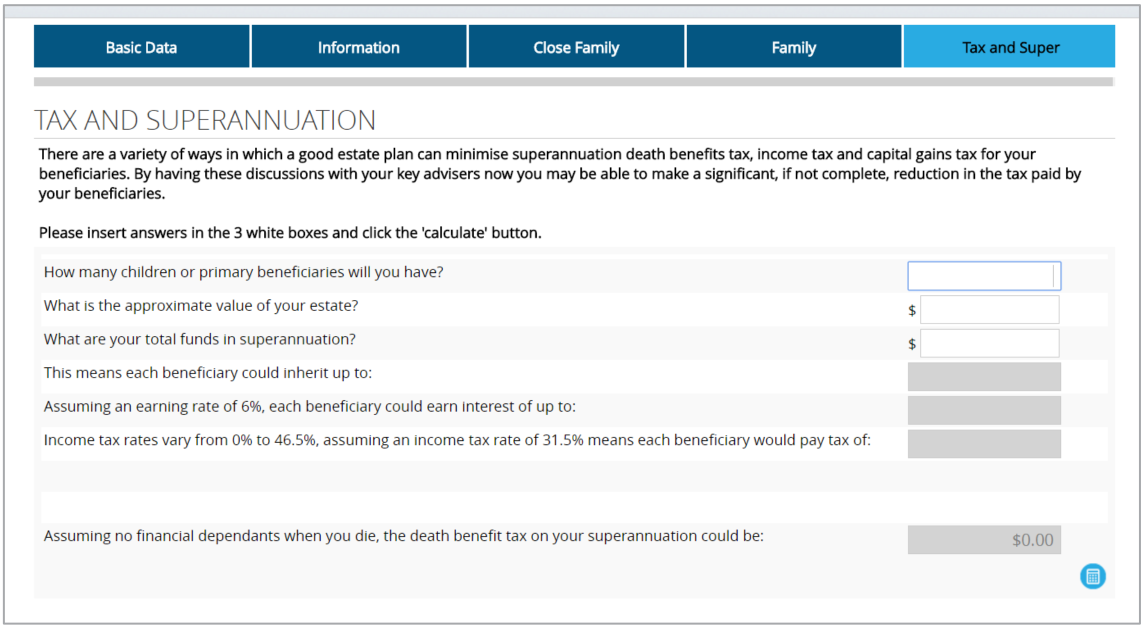
The EPFL Lite EP system is automatically created for the client on commencement of an EPFL system for the client. The EPFL Lite version provides a number of options for the advisor and client. Rather than a multi-step process EPFL Lite can be completed in one step entirely by the client if required.

Option 1 - Select 'Access' to complete the system with the client. This option can also be accessed by selecting the client on the EPFL home page and clicking 'Edit'.

Option 2 - The EPFL Lite system can be emailed to the client by selecting the client on the EPFL home page and clicking 'Email' in the EPFL Lite pie chart.



The client accesses the survey via the email link and completes each of the screens by selecting next. Basic Data, information, Close family, Family, Tax and super, Complex family and Acting behalf screens capture all the key information.



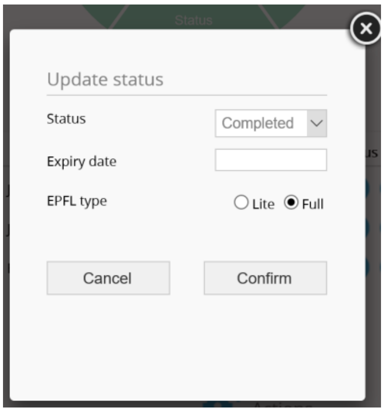
From this point, the adviser can choose to conduct a client meeting and reviews priorities and creates an action plan with the client. The process follows the same steps as the full EPFL system. (R**efer 3.7 Conduct client meeting**)

Alternatively, the client can continue to capture the relevant data and then engage with the adviser to complete an action plan.

5. EPFL dashboard

The EPFL homepage provides a dashboard displaying active client projects and their project status as well as Key metrics, Actions, Clients at risk and Notifications. The ability to show or hide the dashboard is an option in the Settings section with the default to 'Yes'. Project status is indicated as follows: red signifies in progress, blue for completed, and green is for finalised.

Selecting the status provides access to the following pop-up to change stats and add an expiry date. From this screen an advisor can also change the type of EPFL system from Lite to Full and vice-versa



6. administer the crisis management plan information

The Crisis Management Plan contains a large amount of general information designed to assist the client in a time of crisis. The EPFL system does not attempt to formulate a personalised (and expensive) statement of estate planning advice but provides comprehensive guidance for the client in times of stress including:

- Who do I call?
- What information do I need to know?
- What do I ask them?
- What is important?
- What can wait?

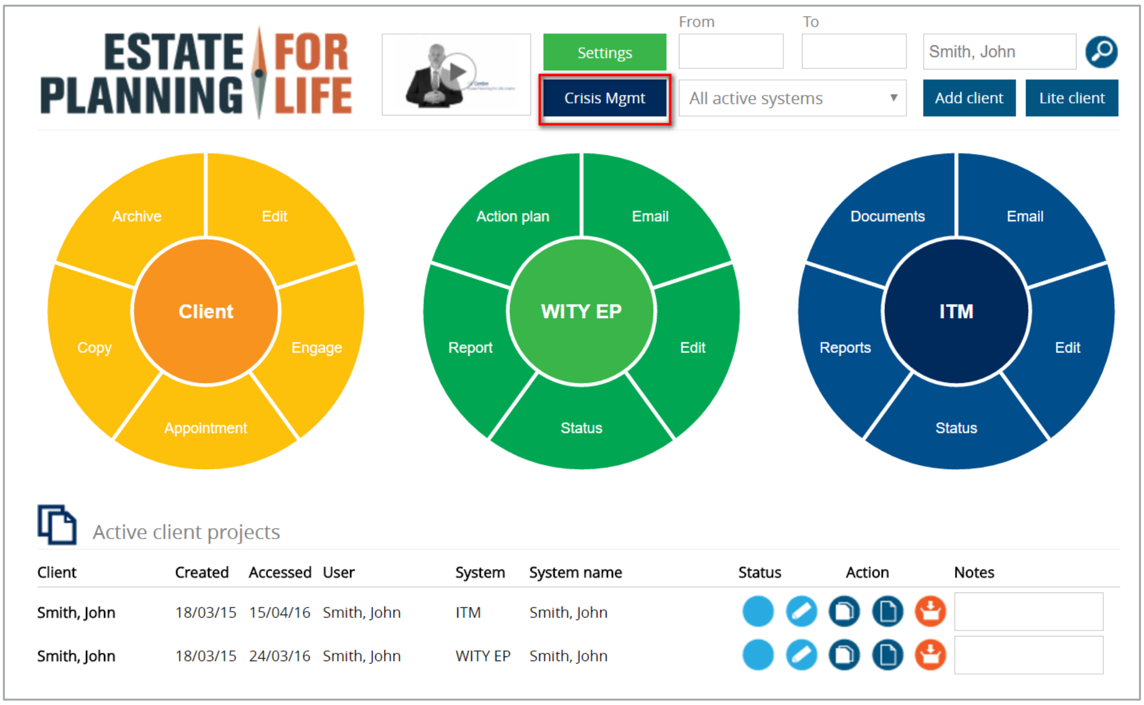
The information contained in the Crisis Management Plan is provided as a default template, but this can be customised by the Adviser if required. When customised information is created within the system, a unique and personalised Crisis Management Plan can be generated.

NB. This is a comprehensive process and should only be commenced if the Adviser has significant personal experience in the Estate Planning area.

6.1 CREATE + ADMINISTER A CUSTOM CRISIS MANAGEMENT PLAN

To create a customised version of the Crisis Management Plan:

- Select the 'Crisis Mgmt' button



- Select the 'Create' button
- Select the client and the client contact as required
- Enter the name of the custom plan
- Select 'Confirm'
- Click the 'Edit' button 

- Enter all relevant data throughout the Crisis Management Plan. Selecting 'Next on each page saves the information of that page.

6.2 COPY AN EXISTING CRISIS MANAGEMENT PLAN SPEC

Advisers may find it quicker and easier to copy an existing Crisis Management Plan and then edit it rather than creating a system from the beginning. To copy an existing Crisis Management Plan:

- Select the 'Crisis Mgmt' button

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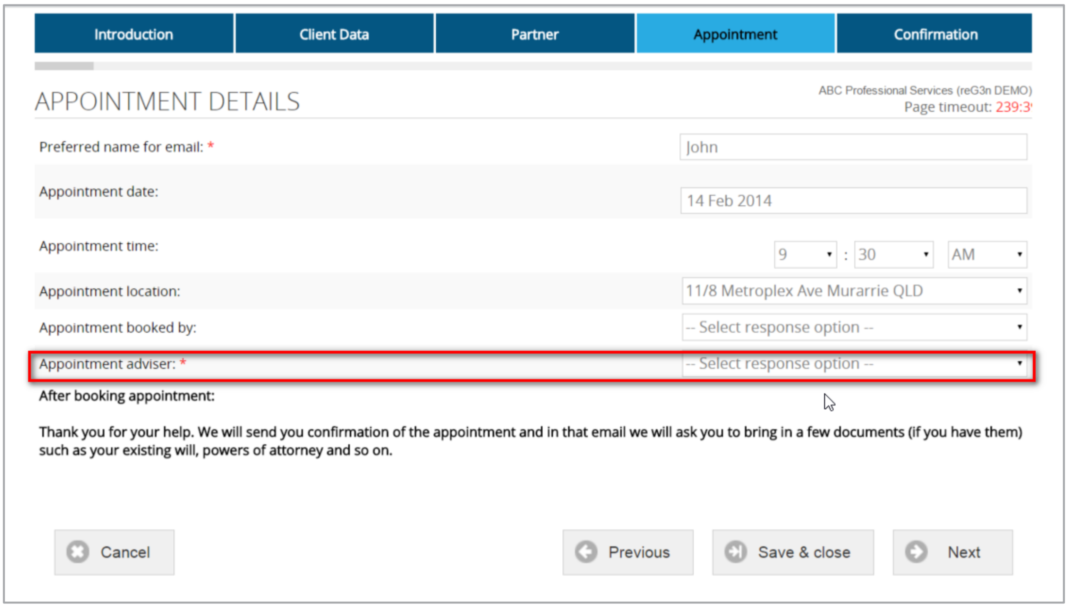
- Click the 'Copy' button
- Select the client and the client contact as required
- Enter the name of the custom plan
- Select 'Confirm'

NB. It is recommended that the default system be copied for editing as this will be quicker and more comprehensive than creating one from the beginning.

- Edit as required and select 'Finish' when completed

NB. The logo for the 'Crisis management report' is dependent on the 'Appointment' adviser being selected.



7. EPFL process comparison chart

A version of Estate Planning for Life is also available in PROPEL.

ESTATE PLANNING FOR LIFE process comparison

*Reduced data	EPFL process	EPFL 'Lite' process	EPFL Propel process
Pre-commencement script	✔		
Client data	✔	✔	
Partner data	✔	✔	
Appointment booking	✔		
Confirmation email	✔		
WITY EP survey link	✔		
Client meeting agenda	✔		
Quotation	✔		
Engagement email	✔		
Basic data	✔	✔*	
Information + copying	✔	✔*	
Close family + dependants	✔	✔*	
Family competence divorce + protecting estate from claim	✔	✔*	
Tax + superannuation	✔	✔*	
Complex family money + disputes	✔	✔*	
Threats business + investment structures	✔		
Acting on my behalf	✔	✔*	
Data	✔	✔*	✔
Your health	✔	✔*	✔
People	✔	✔*	✔
Notifications	✔	✔*	✔
Testamentary	✔	✔*	✔
Funeral wishes	✔	✔*	✔
Inheritance	✔	✔*	✔
Children	✔	✔	✔
Estate documents	✔	✔	✔
Personal documents	✔	✔	✔
Uploaded documents	✔		✔
Bills	✔	✔	✔
Internet logins	✔	✔	✔
Advisers	✔	✔	
Structures	✔	✔	
Assets	✔	✔	
Debt	✔	✔	
Insurance	✔	✔	
Life insurances	✔	✔	
Family trusts	✔		
SMSF	✔	✔	
Partnership/joint venture	✔		
Company	✔		
Unit/other trust	✔		
Sole trader	✔		
Bank accounts	✔	✔	
Super funds	✔	✔	

Estate Planning For Life process comparison
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	EPFL process	EPFL 'Lite' process	EPFL Propel process
Account-based pensions	✓	✓	
Annuities	✓	✓	
Shares	✓	✓	
Government superannuation pensions	✓	✓	
Current overseas pensions	✓	✓	
Safety deposit box or secure storage	✓	✓	
Cars, boats + motor vehicles	✓	✓	
Property	✓	✓	
Aged care bonds	✓	✓	
Managed funds , education, funeral + insurance bonds + other types of investments	✓	✓	
Money owed to you	✓	✓	
Clubs, timeshares + other assets	✓	✓	
Personal effects	✓	✓	
Credit cards	✓	✓	
Mortgages	✓	✓	
Investment debts	✓	✓	
Personal loans/hire purchase/chattel mortgages	✓	✓	
Car loans	✓	✓	
Family loans	✓	✓	
Other loans	✓		
Property insurance	✓	✓	
Vehicle insurance	✓	✓	
Other insurance	✓	✓	
Income protection insurance	✓	✓	
Trauma insurance	✓	✓	
Total + permanent disability insurance	✓	✓	
Term life insurance	✓	✓	
Personal guarantee	✓		
Power of attorney	✓		
Executor	✓		
External corporate roles + other legally reusable role	✓		
Trustee role	✓		
Commercial license	✓		
Community organisations	✓		
Final details	✓		
Final thoughts	✓		
Lock to creating staff member	✓		
REPORTS			
Priorities + Action Plan	✓		
Engagement Authority	✓		
Information That Matters	✓		
Planning Record	✓		
Client Data Record	✓		
Crisis Management Plan	✓		
Priorities + Information Report		✓	

8. Training + support

For training and support options, please refer to MYP Administration, Relationships + Management (ARM) myHelp.

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In the majority of scenarios, client issues are related to user error. A highly recommended strategy is to ask the user to forward an actual screenshot of their issue.

8.1 WHEN A CLIENT REPORTS AN ISSUE WITH THEIR LINK

Please ask them:

- What message do you receive when you click on the link?
- What message do you receive when you cut and paste the link into the address field of your internet browser? Be sure to include the entire link but not any additional characters.
- There may be high security on a work email account or computer. Do you have an alternative email account or computer you could forward the link to?

8.2 CLIENT REPORTS THEY ARE CONTINUING TO RECEIVE SURVEY REMINDERS

If a client states they have completed the survey but are still receiving survey reminders, the likely issue will be based around one of the following reasons:

- The reminder they say they have received was actually received prior to their completing the survey – check date of reminder email and date of survey completion
- They think they completed the survey but did not click 'Submit' – they need to go back in and complete it