

2. Digital Consent: Viewing the Response...

My Clients is a database of clients with whom you have requested digital consent for and will **not be selected for audit**.

- On **Astute Online**, navigate to **My Clients** button (from the **Home**-screen or **CCP > My Clients**).

astute Online™ Astute / Training01 Group : Default Group Log off

Home My Profile Training CCP

My Clients
Only clients that provided Digital Consent can be managed here.

Search Client

Export to Excel

Id/Passport Number	Initi...	Surname	Status	Date Requested	Date Approved	Expiry Date	Request CCP	Edit Client	Delete Requ...	Request Consent
7410017000082	OH	Dear	Approved	2018-01-11 08:42:35	2018-01-11 10:48:46	2019-01-11 10:48:46	Request CCP Client	Edit	Delete	Request
6404010000088	P	Pompies	Pending	2018-01-11 10:47:45			Request CCP Client	Edit	Delete	Request

10 items per page 1 - 2 of 2 items

Home View My Transactions

After the Client Has Responded

- Navigate to **My Transactions** screen and proceed as normal.

Export to Excel

Id/Passport Number	Initi...	Surname	Status	Date Requested	Date Approved	Expiry Date	Request CCP	Edit Client	Delete Requ...	Request Consent
7410017000082	OH	Dear	Approved	2018-01-11 08:42:35	2018-01-11 10:48:46	2019-01-11 10:48:46	Request CCP Client	Edit	Delete	Request
6404010000088	P	Pompies	Pending	2018-01-11 10:47:45			Request CCP Client	Edit	Delete	Request

10 items per page 1 - 2 of 2 items

Home View My Transactions

If the client has declined:

- You won't be able to proceed with the transaction.
- The transaction will not be processed and will be removed from your *Transaction* page.

Export to Excel

Id/Passport Number	Initi...	Surname	Status	Date Requested	Date Approved	Expiry Date	Request CCP	Edit Client	Delete Requ...	Request Consent
7410017000082	OH	Dear	Declined	2018-01-11 08:42:35			Request CCP Client	Edit	Delete	Request
6404010000088	P	Pompies	Pending	2018-01-11 10:47:45			Request CCP Client	Edit	Delete	Request

10 items per page 1 - 2 of 2 items

Home View My Transactions



Before the Client Has Responded

- The request will show as *Pending* until the Client has responded to the request.

Consents

Export to Excel										
Id/Passport Number	Initi...	Surname	Status	Date Requested	Date Approved	Expiry Date	Request CCP	Edit Client	Delete Requ...	Request Consent
7410017000082	OH	Dear	Approved	2018-01-11 08:42:35	2018-01-11 10:48:46	2019-01-11 10:48:46	Request CCP Client	Edit	Delete	Request
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10 items per page | 1 - 2 of 2 items

Home View My Transactions

If you try to proceed...

- The transaction has not processed...

My CCP Transactions

Reference	ID Number	Initials	Surname	Date of Birth	Products	Responses
CCP-2018/01/11-2	6401010000088	P	Pompies	01 Apr 1964	Life And Risk, Unit Trusts, Linked Investments	0 of 19 Responded

10 items per page | 1 - 1 of 1 items

My Clients Perform Another Transaction

This means Digital Consent is still pending

If you try to view the response before the client has responded, you will get the following messages:

Policy Summary

My Transactions Download PDF Download XML

Client ID No	Client Name	Date of Birth	Content Provider	Time Requested	User Name	Reference
6401010000088	P Pompies	01 Apr 1964	Old Mutual South Africa, Liberty Group Limited, Momentum, Metropolitan, Discovery Life, Liberty Group Limited (CAL), PPS, Hollard Life, ABSA Life, Sanlam, Nedbank Insurance, FMI	11 Jan 2018 08:42 AM	DMchenga	CCP-2018/01/11-2

Consolidated Client Portfolio

The values quoted, as supplied by the Product Suppliers, are provisional estimates only. Final values will be determined by the Product Suppliers on the date of discharge as per the current practice of the Product Supplier, as set out in your policy document. Please note that the information supplied may have been **restricted** in order to eliminate information to which the client may not be entitled.

Consolidated Client Portfolio - Summary				
Content/Product Provider	Product Type	Policies/Products		Packages
		Active	Inactive	
	TOTAL			
Old Mutual		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Liberty Group Limited		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Momentum		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Metropolitan		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Discovery Life		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Liberty Group Limited(CAL)		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Professional Provident Society		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Hollard Life		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
ABSA Life		Awaiting Content Provider's response. Please do not re-submit this request. (100)		
Sanlam		Awaiting Content Provider's response. Please do not re-submit this request. (100)		

These are not error messages. The transaction was not processed!

The system is not unresponsive. Wait patiently for the client to respond. Proceeding with the manual process, without cancelling the digital consent, may incur additional charges.

