

MorganAsh

The MorganAsh
Resilience System -
intelliflo office integration



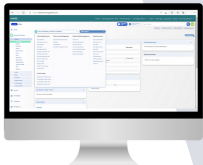
A guide

For intelliflo users

The MorganAsh Resilience System (MARS) is a **cloud-based system** to **assess, manage, track and report on consumer characteristics** to enable compliance with **FCA vulnerability and Consumer Duty regulations**. This API integration enables data on individual consumers to be passed to the MARS tool, and the **MARS Resilience Certificate passed back to intelliflo office integration**.

MARS requires a consumer's name, DOB and email as a minimum, but also address, and contact details can also be passed over. The **MARS Resilience Certificate** is a PDF and includes a statement of the **Consumers Resilience**, the date the assessment was made, and any treatments recommended. This is intended to be kept with the file for the consumer's audit purposes.

This document will walk you through the process of **loading your intelliflo office clients into the MorganAsh MARS Portal**, creating a **MARS case**, and obtaining a **MARS Rating Report** (Certificate) back into your **intelliflo office integration**.

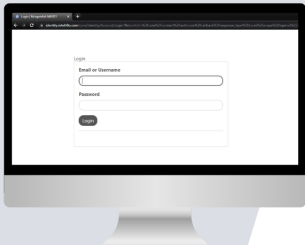


1

Select the **client** you want to **load into MARS** from your **intelliflo office dashboard**. Click the **'client actions'** tab next to the **client name**. Then, from the list of actions, select **Store Apps and MorganAsh Resilience System**.

2

First you will be asked to supply your intelliflo user account details. This is to confirm that you allow Morgan Ash to connect with your intelliflo account.



3

Morganash Login

Username

Password

Trust this browser for 7 days ⓘ

(This option is NOT recommended when using a shared or public pc)

Login Cancel

[Forgot Password](#)

[Reset My Password](#)

You will be then prompted to log into the MorganAsh MARS system using your **existing MorganAsh MARS login**.

Please enter your **MorganAsh login details**.

These will be provided to you when you **open your MorganAsh MARS account**. You must have a MorganAsh account before you can access the MARS system.

To enquire and register, please email: info@morganash.com

Assessment options



Firms can **configure MARS** with various options. When using the intelliflo, **firms have the option to let each case be configured individually or to use the set options set by the firm.**

4

Which **product** is of concern.

The status of the case - i.e., **enquiry, contract or existing customer.**

Choice between three assessment lengths: **short, medium, and extensive.**

Please indicate whether the relationship with the consumer is an **'Enquiry'** in preparation for a **'Contract'** or an **'Existing Customer'**.

What to include in the assessment:



Financial data



Protected characteristics data



Identity data



Will and Lasting Power of Attorney

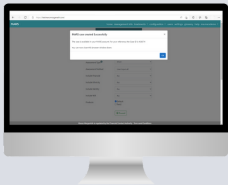
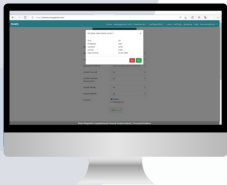


The **assessments** can be completed by **the user, emailed to the consumer, or scheduled with a MorganAsh Nurse.**

To demonstrate, we show **how all options are left to the individual case to be selected**; in practice, we expect most options to be **configured at the firm level**, reducing the need for manual intervention when passing cases from **MARS to Intelliflo office**.

5

You will be prompted to **confirm** that this is the **Intelliflo office client** to load into MARS after clicking **"continue."**

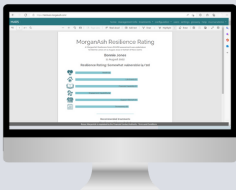
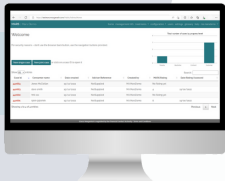


6

A **confirmation** will be shown once the client has been loaded and the **MARS case** has been created. At this point, you have the option of **closing the window or adding a new client** by following the same procedures.

7

If you visit the MARS portal, you will see that the client's case is now listed under your MARS account.



8

The amount of data on the **Vulnerability Assessment Report (Certificate)**, can be configured by MorganAsh, including short, medium or extensive, depending on how much detailed data on vulnerability the user wants to pass into Intelliflo.

9

You may not need to go into the **MARS Portal** to continue as, once the consumer/client assessment is completed in **MARS**, the **Vulnerability Assessment Report** (Certificate) containing the **MARS Resilience Rating** will be automatically uploaded back to your **intelligflo office account** and can be found under the **'Client Documents' section**. To open the PDF, click on the report title.



————— Here to help —————

If you have any questions, please contact one of our friendly team members, who will be happy to help.



CustomerServices@morganash.com