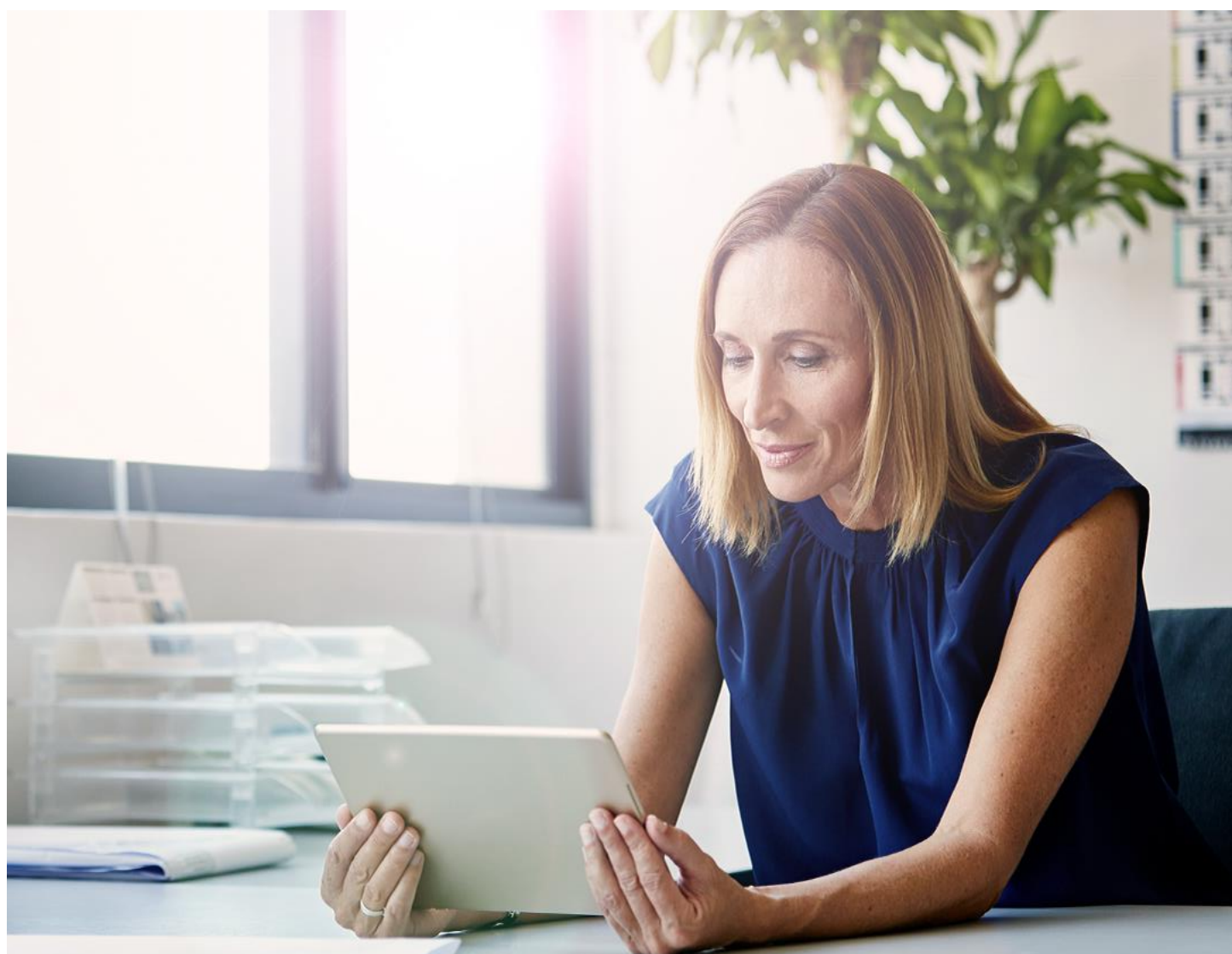


Adviser Site Self-Service Online User Guide



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What is Self-Service?

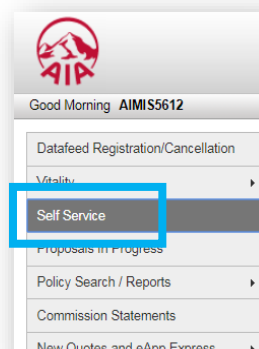
Self Service is accessed through the Adviser Site and allows Advisers to **view** and **request in-force policy alterations online**. The mobile responsive design means Self-Service can be easily accessed on any device.

Self-Service capability provides Advisers with the convenience to submit alteration requests directly online resulting in **faster processing times**, and the ability to make certain **real time updates** to policy details if they hold an authority on behalf of that client.

The Self-Service platform has been developed with mobile responsive design. This means you are able to access and easily use Self-Service from your Desktop, Laptop, Tablet or Mobile device.

Access to Self Service

A link titled “**Self Service**” has been added to the Adviser Site menu. When you select this link your logon credentials will be authenticated via Single Sign On.



Search Functionality

The Search menu is located on the left hand side of the Self Service screen

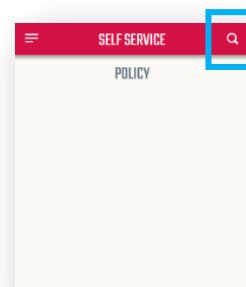
Enter information on the Search fields to return a list of matching policies.

You can search by:

- Policy Number
- Life Insured Name
(First name and/or Last name)
- Life Insured Date of Birth

The screenshot shows a mobile-style search form. At the top is a header bar with the word "SEARCH" in white on a dark background. Below this are three input fields, each with a label and a text box: "Policy Number", "Name" (with "Life Insured" as placeholder text), and "Date of Birth" (with "dd/mm/yyyy" as placeholder text and a clear 'x' icon). At the bottom of the form are two buttons: a red "SEARCH" button and a grey "RESET" button.

In the Mobile/Tablet view, the Search menu is opened using the Search icon on the top right.





If more than one policy is found, a list of results will be displayed. Select anywhere on the results line to open the policy.

POLICY NO.	INSURED NAME	DOB	PRODUCT	STATUS	COMMENCEMENT DATE	AIA VITALITY
1. 73170175	JANUARIA NIKOLAI	01/08/1975	PP13	LAPSE D	18/03/2018	
2. 71822087	CHANDRA P. JOO	07/08/1975	PP13	ACTIVE	23/09/2013	
3. 78272715	EBENSON ABIDUO	07/08/1975	PP13	DECLINED	07/10/2013	
4. 75416316	CHANDRA NIKOLAI	07/08/1975	PP12	ACTIVE	07/09/2013	AIA Vitality
5. 61350275	STANLEY NIKOLAI	07/08/1975	PP13	ACTIVE	12/11/2014	
6. 231103429	JOHN JOO L. L. K.	01/08/1975	PP11	ACTIVE	10/04/2007	
7. 23127752	CHANDRA NIKOLAI	07/08/1975	PP06	ACTIVE	23/01/2007	
8. 14333686	JOHN NIKOLAI	01/08/1975	PP11	ACTIVE	08/06/2011	
9. 13142915	CHANDRA P. JOO	07/08/1975	PP13	ACTIVE	25/11/2013	
10. 12561030	JOHN NIKOLAI	01/08/1975	PP08	ACTIVE	08/06/2008	
11. 12561030	JOHN NIKOLAI	01/08/1975	PP08	CANCELLED	15/03/2006	
TOTALS						

You can change the order of the policies by clicking the column headings

POLICY						
POLICY NO. ▼	INSURED NAME	DOB	PRODUCT	STATUS	COMMENCEMENT DATE	AIA VITALITY
1 70713275	JAXXXXX NAXXX	07/05/1975	PP13	LAPSED	14/01/2014	
2 78870987	DAXXXX THXX	07/05/1975	PP13	ACTIVE	23/08/2013	
3 78073115	FXXXXX ABXXXX	07/05/1975	PP12	DFCD RPTD	07/05/2013	
4 75410516	DXXXX CHXXXX	07/09/1975	PP12	ACTIVE	07/02/2013	AIA Vitality
5 41393273	STXXXX RXXXX	07/09/1975	PP13	ACTIVE	10/11/2014	
6 20103429	JXXX XXX LEX	07/09/1975	PP11	ACTIVE	16/04/2007	
7 20137782	EXXX WXXX	07/09/1975	PP09	ACTIVE	22/01/2007	
8 1450366	PPXXX MXXXXXXX	07/05/1975	PP11	ACTIVE	06/06/2011	
9 13145915	DAXXXX THXX	07/05/1975	PP13	ACTIVE	21/11/2013	
10 12502129	PLXXXX MXXXXXXX	07/09/1975	PP09	ACTIVE	06/09/2009	
11 12502280	LAXXXXX CHXX	07/09/1975	PP08	CANCELLED	15/01/2006	
TOTAL: 6						

The Search result view is designed to adjust for optimal use on Mobile and Tablet devices. Column sorting is not available on these devices.

SELF SERVICE	
POLICY	
	JAXXXXX NAXXX
DOB: _____	
Product: PP13	
Status: LAPSED	
Commencement Date: 14/01/2014	
	DAXXXX THXX
DOB: _____	
Product: PP13	
Status: ACTIVE	
Commencement Date: 23/08/2013	
	ESXXXX ABXXXX

Policy Detail Screen

The Policy Detail screen contains basic information about the policy and a list of services available to access through Self Service.

The policy information displayed on this screen includes:

- Product
- Commencement Date
- Status
- Payment Frequency
- Anniversary Date
- CPI Applied

The screenshot shows the 'POLICY' detail screen. On the left is a sidebar with search filters (Policy Number, Name, Life Insured, Date of Birth) and buttons for SEARCH, RESET, STATUS, and SERVICE REQUESTS DASHBOARD. The main content area displays policy details: Product (LIFE COVER), Commencement Date (30/01/2019), Status (ACTIVE), Anniversary Date (30/01/2019), Payment Frequency (Monthly), Premium Amount (\$196.91), and CPI applied (Yes - Policy Level). Below this, it lists the Insured (JAMES VANDERKAM), Current Insured Address (100 XXXXXXXX St, Ruyig VIC 3046, AUSTRALIA), and Current Bank Account (BSB No: XXXXXX, Account No: XXXXXXXXXX). At the bottom, there is a 'Create Claim' button. A blue box highlights the top section of the policy details.

This main screen also provides the additional services available including:

- Creating a Service Request
- Update Address Details
- Update Bank Account or Credit Card Details
- View History for Address and Bank/Credit Card updates
- Creating a Claim

This screenshot is identical to the previous one, but with blue boxes highlighting the 'SERVICE REQUEST' button at the top right, the 'UPDATE' and 'HISTORY' buttons for the Insured Address, the 'UPDATE' and 'HISTORY' buttons for the Bank Account, and the 'Create Claim' button at the bottom right.

Note: If you do not hold an existing authority from your Client, the '**UPDATE**' buttons above will be disabled and the following message will appear at the top of this screen. Click on the '**Adviser Authority form**' link to download a copy of the form and once AIA has received a signed copy of this form, the '**UPDATE**' buttons will be enabled and you will be able to access the additional Self-Service functionality.

The screenshot shows a white banner with a green icon of a document and a pencil. The text reads: "You do not have authority to update this policy. Please submit a signed [Adviser Authority form](#). If you believe you have already submitted a signed authority for this client, please contact AIA." Below the text, it shows "Product: TERM LIFE" and "Commencement Date: 03/10/2001" on the left, and "Status: NOT TAKEN" on the right. A close button (X) is in the top right corner.

Service Request Functionality

The Service Request functionality allows you to submit the following alterations to AIA for processing:

- Change in Payment Frequency
- Change of address
- Change of smoker status
- Decrease in Sum Insured
- Increase in Sum Insured
- Lost policy Document Replacement
- Nomination of Beneficiary
- Policy Cancellation Request
- Remove CPI
- Stop Debit
- Supplementary Application for V
- AIA Super – Change in Payment Frequency
- AIA Super – Decrease in Sum Insured
- AIA Super – Increase in Sum Insured
- AIA Super – Lost policy Document Replacement
- AIA Super – Nomination of Beneficiary
- AIA Super – Policy Cancellation Request
- AIA Super – Remove CPI
- AIA Super – Rollover Benefit Statement

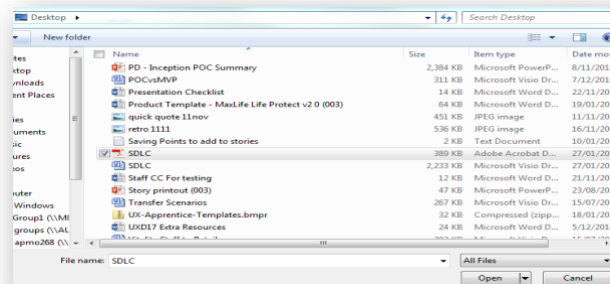
Create a Service Request

To create a request, select **SERVICE REQUEST** to start a new task.

The Create Service Request screen will appear. All currently available service types require supporting documentation. Click **BROWSE** to select the document you want to upload.

Note: To return to the main policy page, simply select the Cross (X) on the top right corner or press **Esc** key

Select the document you want to upload.



The selected document will appear in the **Services Pending Confirmation** section.

The Service Type field is then also available to select the alteration you would like to submit.

Select the **Service Type** associated with the document from the drop down menu and click **CREATE SERVICE**.

The screenshot shows the 'ADVISER SITE | SELF SERVICE' interface. On the left, there's a 'SEARCH' section with fields for 'Policy Number', 'Name', 'Date of Birth', and buttons for 'SEARCH' and 'RESET'. The main area is titled 'CREATE SERVICE' and features a dropdown menu with the following options: Change in Payment Frequency, Change of Address, Change Service Status, Decrease in Sum Insured, Increase in Sum Insured, Lost Policy Document Replacement, Nomination of Beneficiary, Policy Cancellation Request, Remove CPI, Stop Detail, Supplementary Application for V, AIA Super - Change in Payment Frequency, AIA Super - Decrease in Sum Insured, AIA Super - Increase in Sum Insured, AIA Super - Lost Policy Document Replacement, AIA Super - Nomination of Beneficiary, AIA Super - Policy Cancellation Request, AIA Super - Remove CPI, AIA Super - Withdraw Benefit Statement, and Submit. Below the dropdown is a 'Choose Files' button and a list of 'Services Pending' with columns for 'File Name', 'Service Type', 'Comments', 'Size', 'Status', and 'Remove'. A 'CREATE SERVICE' button is highlighted with a red box. On the right, there's a 'POLICY' section with a text area for 'Valid file types are: PDF, JPG, BMP, GIF, PNG, XLS, XLSX, DOC, DOCX and TIF. A maximum file size limit of 20 MB applies to each file.' and a table with columns for 'Comments', 'Size', 'Status', and 'Remove'. The table shows a file named 'Screen2.docx' with a size of '624.03 KB' and a status of 'Ready to Upload'.

Upon successful upload, the document will be listed under **Services Created** with status **Uploaded Successfully**.

File Name	Service Type	Comments	Size	Status	Message	Reference No.
SDLIC.pdf	Lost Policy Document Replacement		388.95 KB	Uploaded Successfully		1485921254517



DID YOU KNOW?

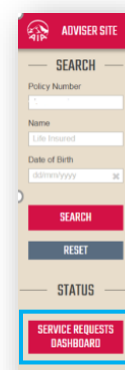
Submitting your request using a **Service Request** in Self Service will ensure your **request reaches us sooner** and is **processed faster** than if you were to submit via standard email or mail options.

Service Request Dashboard

The **'Service Request Dashboard'** displays the status of alteration requests submitted via a Service Request only.

Note: Alterations submitted to AIA via other channels (e.g. phone, email) will not be displayed on the dashboard. The dashboard is limited to the service types available in the Service Request functionality in Self Service.

The Service Request Dashboard can be accessed by selecting **'SERVICE REQUEST DASHBOARD'** button on the left hand search panel.



Once selected, the dashboard appears on the right side of the screen.



The dashboard is split into 2 sections:

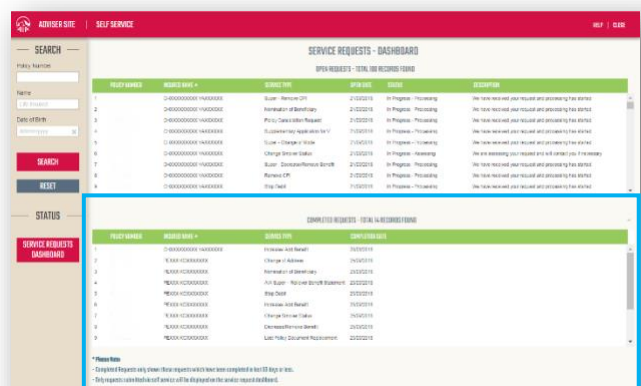
1. **Open Requests** – will display all open Service Request currently in progress and include:
 - **Policy Number**
 - **Insured Name**
 - **Service Type** – the alteration selected in the Service Request submitted
 - **Open Date** – date the request was submitted
 - **Status** – provides status of where the request is at
 - **Description** – Further information about that specific status
2. **Completed Requests** – displays requests that were completed in the last 60 days or less and include:
 - **Policy Number**
 - **Insured Name**
 - **Service Type** – the alteration selected in the Service Request submitted
 - **Completion Date**



By default the completed requests will be minimised. To expand this section, simply click on the '+' symbol on the right hand side of the screen.

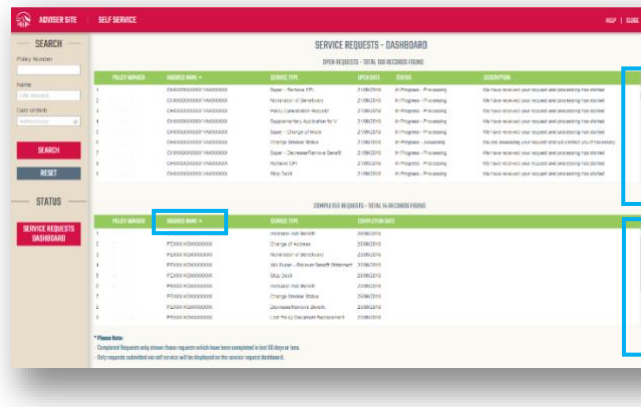


When selected, the completed section will expand to display completed requests within 60 days or less.



The Service Request Dashboard by default will always display with the '**Insured Name**' in ascending order.

Every column can be sorted by hovering on the column name and selecting the arrow that appears or use the scroll panel on the right to search through the list of requests.

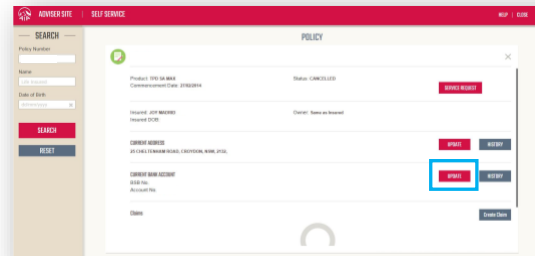


Alterations

Change of Address Details

The current residential address details of the Client are displayed on the Policy Detail screen.

Select **UPDATE** to open the Change of Address screen.



The address details are pre-populated into the relevant fields. You can update individual fields or choose to remove all the current address information by selecting **Clear Residential Address**.

Note: Separate addresses will be displayed if the Life Insured and Policy Owner are different people.

 A screenshot of the 'CHANGE INSURED ADDRESS' form. The form has fields for 'Residential Address' (Country, Postcode, State, Suburb / City, Address Line 1, Address Line 2) and 'Postal Address' (with a checkbox 'Same as Residential Address'). The 'Country' field is set to 'AUSTRALIA'. There is a 'Clear Residential Address' button. A 'Please note' box at the bottom states: 'Any changes made to the above address will be automatically applied to any related policies for this client. If you do not see all of the client's policies listed on the confirmation screen for this change, please check the client listing in case this client has a duplicate ID with AIA Australia. If this is the case please update the address for the alternate client ID as well.'

When **AUSTRALIA** is selected as the Country, the address fields will be predictive. When you begin typing, address details matching your entry will be suggested to you.

 A screenshot of the 'CHANGE INSURED ADDRESS' form, similar to the previous one, but with the 'Postcode' field active. A dropdown menu is open, showing predictive suggestions: '7000', 'Glebe, TAS, 7000', 'Hobart, TAS, 7000', 'Mount Stuart, TAS, 7000', 'North Hobart, TAS, 7000', 'Queens Domain, TAS, 7000', and 'West Hobart, TAS, 7000'. The '7000' suggestion is highlighted.

Selecting a suggested address will populate related fields for you.

To enter a different Postal address, you can un-select the **Same as Residential Address** checkbox and the Postal Address section will be expanded to allow you to enter different details.

Select **UPDATE** when you are ready to submit your changes.

You will get a message informing you if the update was a success. Confirm all the required policy numbers for the Client are listed. If there are any policies missing for the Client, please search and update these policies separately.

Change Bank Account Details

The current bank account payment details of the policy are displayed on the Policy Detail screen.

Select **UPDATE** to open the Change of Bank Account screen.

The screenshot shows the 'POLICY' detail screen. On the left is a sidebar with 'SEARCH' and 'FILTER' buttons. The main area displays policy information: Product: TPD SA MAX, Commencement Date: 27/02/2014, Status: ACTIVE, and Current Bank Info: Account Holder: I, Financial Institution: WBCBentleigh, Payment Type: Direct Debit, Payment Frequency: YEARLY. At the bottom right, there are two buttons: 'UPDATE' (highlighted with a red box) and 'CANCEL'.

If more than one policy exists for the payer of the policy, a policy selection screen will appear with a list of related policies.

The screenshot shows a 'CHOOSE POLICY TO UPDATE' dialog box. It contains a list of policies with checkboxes. The first policy is selected (checkbox checked) and shows details: BSB NO. XX3034, Account No. XXXX5676, and Product: TPD SA MAX. The second policy is not selected (checkbox unchecked) and shows details: BSB NO. XX3009, Account No. XXXX56789, and Product: TPD SA MAX. At the bottom are 'NEXT' and 'CANCEL' buttons.

Select the **drop-down arrow** to view more policy and current bank information.

This screenshot is similar to the previous one, but the drop-down arrow on the right side of the first policy entry is highlighted with a red box. Below the policy list, there is a section titled 'CURRENT BANK INFO' which displays: Account Holder: I, Financial Institution: WBCBentleigh, Payment Type: Direct Debit, and Payment Frequency: YEARLY.

You can select one policy at a time to update with different payment details, or you can update several policies at once with the same payment details.

When you have chosen the policies you want to update, select **NEXT**.

Certain policies need to be manually processed by AIA. If you are unable to process the change on Self Service a message will be displayed advising this.

If you wish to update the payment information on one of these policies, please submit the new payment details by contacting AIA.

Enter the **Account Holder name**, **BSB** and **Account No.** The Financial Institution will update automatically based on the BSB.

Select **UPDATE** when you are ready to submit your changes. A message will confirm if the update was successful.

Change Credit Card Details

The current credit card account payment details of the policy are displayed on the Policy Detail screen.

Select **UPDATE** to open the Change of Credit Card Account screen.

The screenshot shows the 'POLICY' detail screen. On the left is a sidebar with 'SEARCH' and 'NEXT' buttons. The main content area displays policy information. Under the 'CURRENT CREDIT CARD INFO' section, the 'UPDATE' button is highlighted with a red box.

If more than one policy exists for the payer of the policy, a policy selection screen will appear with a list of related policies.

The screenshot shows the 'CHOOSE POLICY TO UPDATE' screen. It has a 'Select All' checkbox and a list of policies. The first policy is selected, showing 'SHXXXX MCXXXX' with a drop-down arrow. Below it, the card details are displayed: Card Name: Jo Citizen, Card No. 444433*****1111, and Expiry Date: 01/18. At the bottom are 'NEXT' and 'CANCEL' buttons.

Select the **drop-down arrow** to view more policy and credit card information.

The screenshot shows the 'CHOOSE POLICY TO UPDATE' screen with the drop-down arrow expanded. It displays additional information for the selected policy: 'TTCSL LIMITED' with a blue envelope icon. Below this, it shows 'Card Name: Jo Citizen', 'Card No. 444433*****1111', and 'Expiry Date: 01/18'. Further down, it lists 'DOB:', 'Product: LIFE COVER', 'Commencement Date: 03/03/2013', and 'Status: ACTIVE'. At the bottom, under 'CURRENT CREDIT CARD INFO', it shows 'Payment Type: Direct Debit' and 'Payment Frequency: MONTHLY'.

When you have chosen the policies you want to update, select **NEXT**.

Certain policies need to be manually processed by AIA. If you are unable to process the change on Self Service a message will be displayed advising this.

If you wish to update the payment information on one of these policies, please submit the new payment details by contacting AIA.

Type the **Cardholder Name** and **Card Number** and select **Expiry Date**.

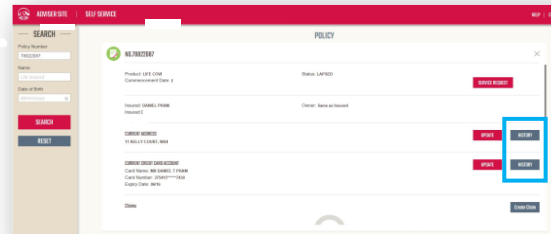
Once the details are completed, select **SUBMIT**.

A message will confirm if the update was successful.

History Log

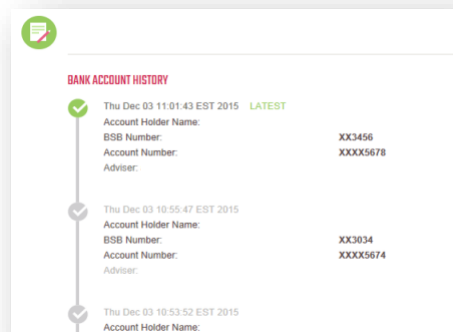
All changes made on a policy are stored in a History Log.

Select **HISTORY** to view the history of that service.

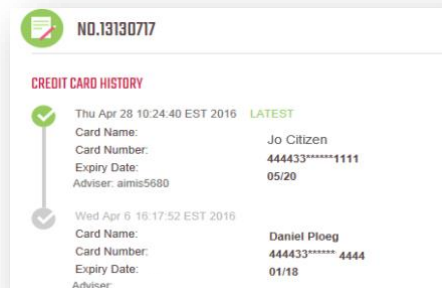


Payments History shows a chronologically ordered set of past payment details.

Bank Account History example



Credit Card History example



Address History shows a chronologically ordered set of address details for the Insured's and Owner's Residential and Postal addresses.

