Adviser Site

Self-Service Online User Guide

AIA Australia (ABN 79 004 937 861 AFSL 230043)
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Contents

What is Self-Service?

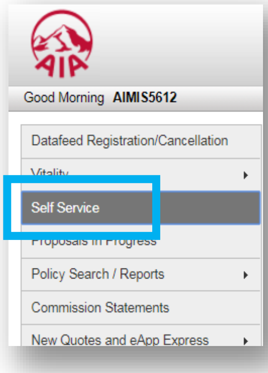
Self Service is accessed through the Adviser Site and allows Advisers to **view** and **request in-force policy alterations online**. The mobile responsive design means Self-Service can be easily accessed on any device.

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.



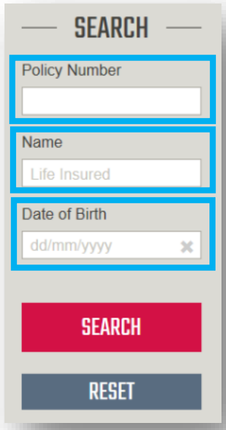
Search Functionality

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

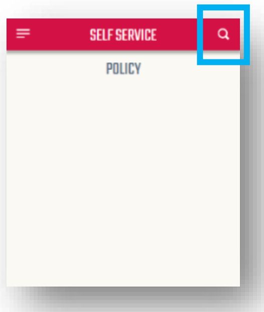
Enter information on the Search fields to return a list of matching policies.

You can search by:

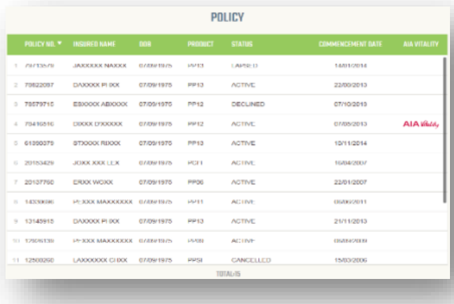
- Policy Number
- Life Insured Name
  (First name and/or Last name)
- Life Insured Date of Birth



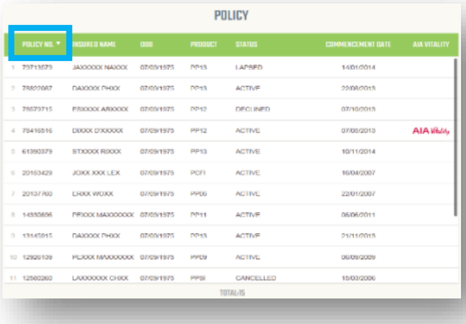
In the Mobile/Tablet view, the Search menu is opened using the Search icon on the top right.



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



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



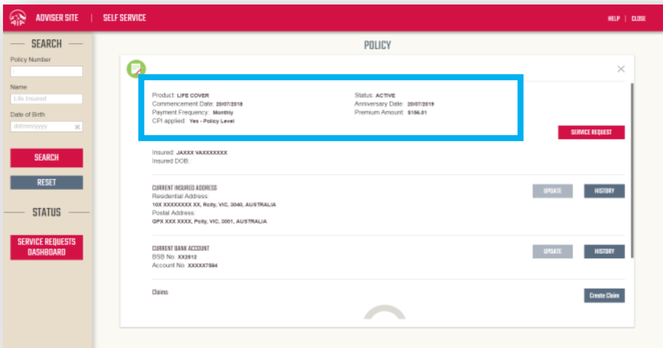
The Search result view is designed to adjust for optimal use on Mobile and Tablet devices. Column sorting is not available on these devices.

Policy Detail Screen

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

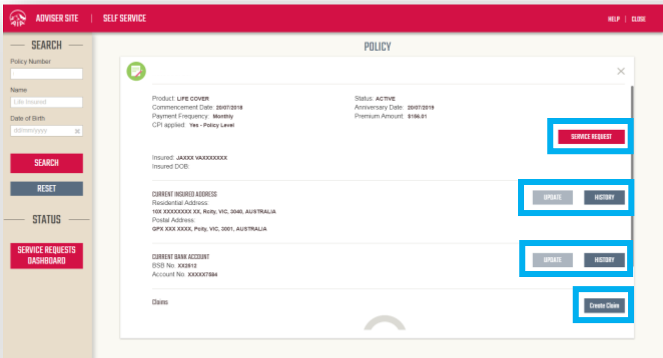
The policy information displayed on this screen includes:

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



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



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.

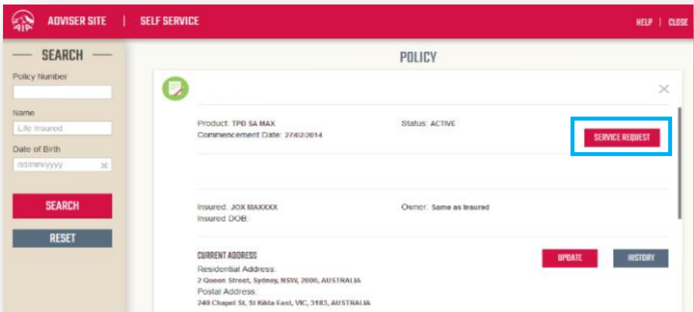
Service Request Functionality

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

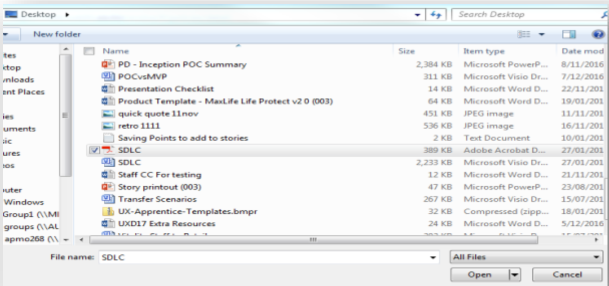
To create a request, select ***SERVICE REQUEST*** to start a new task.



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.

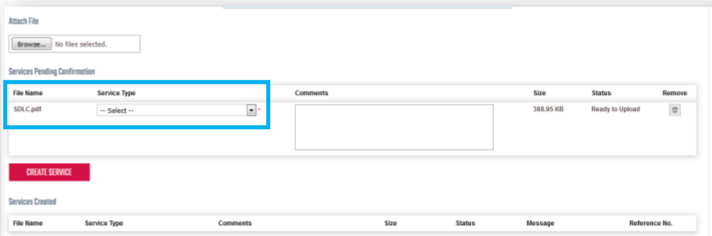
Note: To return to the main policy page, simply select the Cross **(X)** on the top right corner or press **Esc** key

Select the document you want to upload.

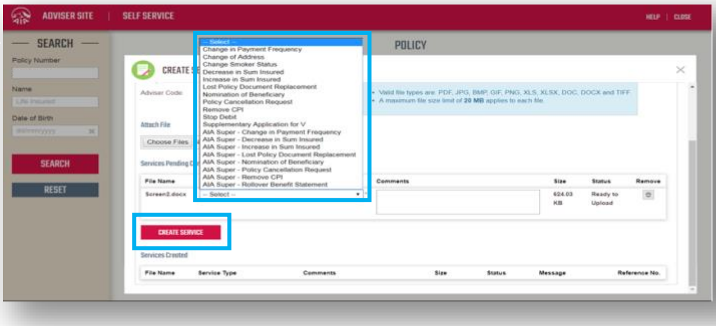


The selected document will appear in the ***Services Pending Confirmation*** section.

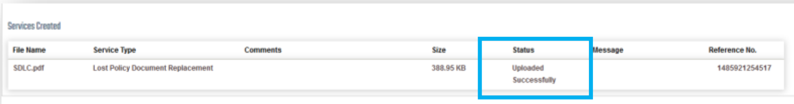
The Service Type field is then also available to select the alteration you would like to submit.



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



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



DID YOU KNOW?

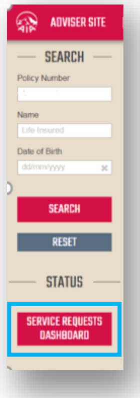
Submitting your request using a ***Service Request*** in Self Service will ensure your ***request reaches us sooner*** and is ***processed faster*** than if you were to submit via standard email or mail options.

Service Request Dashboard

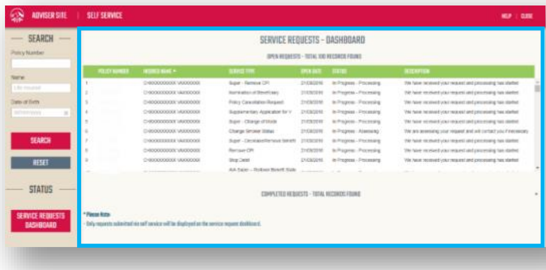
The ***'Service Request Dashboard'*** displays the status of alteration requests submitted via a Service Request only.

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.



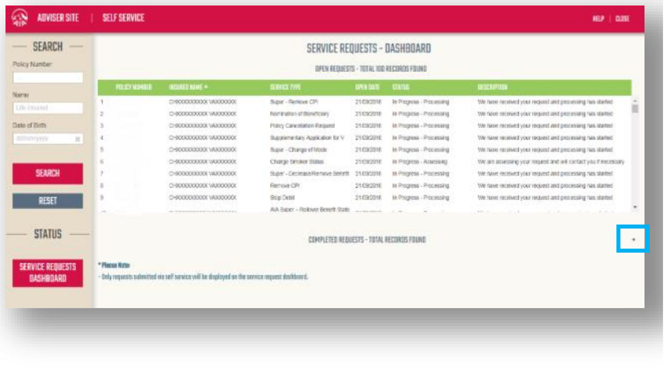
The dashboard is split into 2 sections:

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**

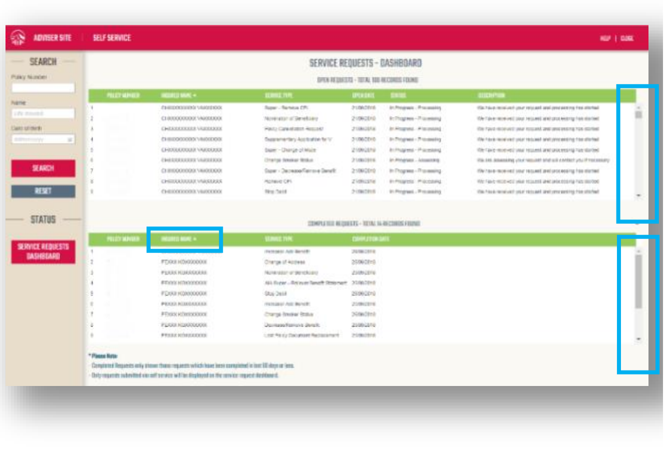
By default the completed requests will be minimised. To expand this section, simply click on the '+' symbol on the right hand side of the screen.



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.

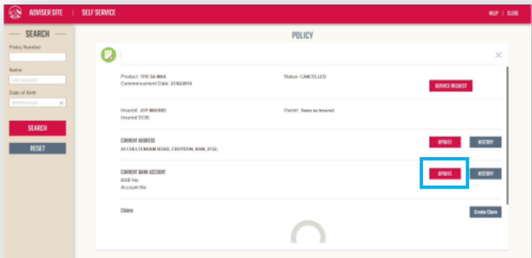


Alterations

Change of Address Details

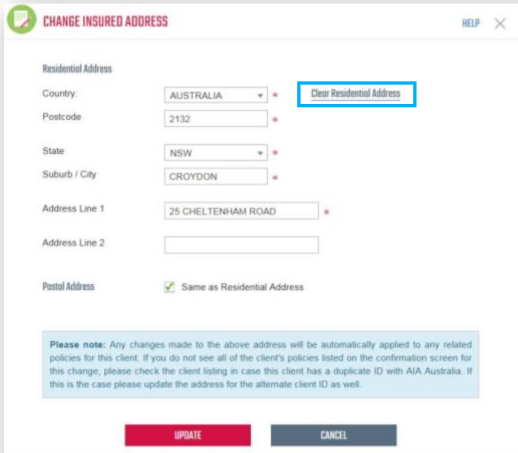
The current residential address details of the Client are displayed on the Policy Detail screen.

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

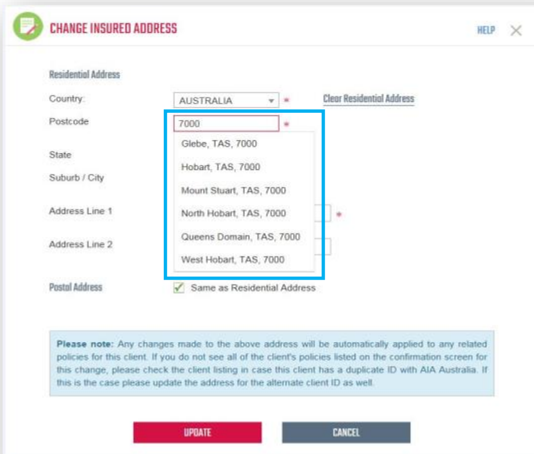


The address details are pre-populated into the relevant fields. You can update individual fields or choose to remove all the current address information by selecting ***Clear Residential Address.***

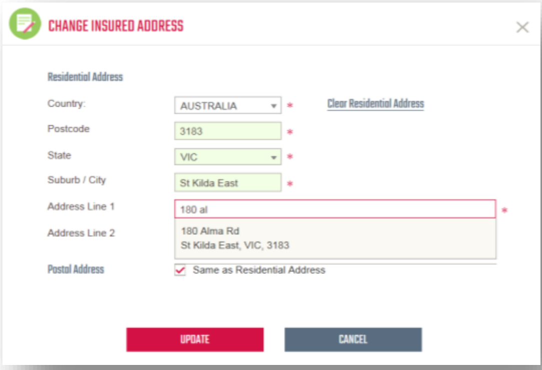
Note: Separate addresses will be displayed if the Life Insured and Policy Owner are different people.



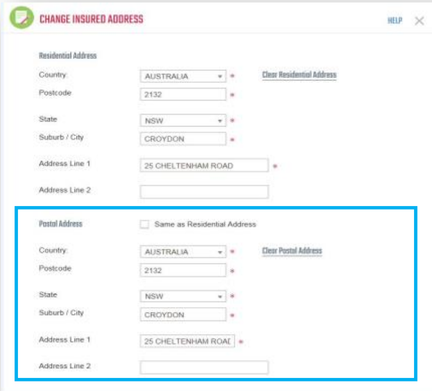
When ***AUSTRALIA*** is selected as the Country, the address fields will be predictive. When you begin typing, address details matching your entry will be suggested to you.



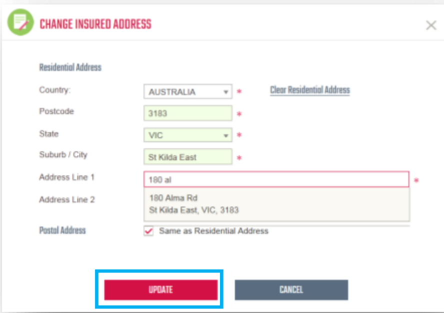
Selecting a suggested address will populate related fields for you.



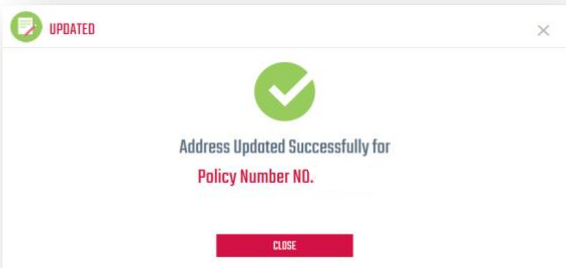
To enter a different Postal address, you can un-select the ***Same as Residential Address*** checkbox and the Postal Address section will be expanded to allow you to enter different details.



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



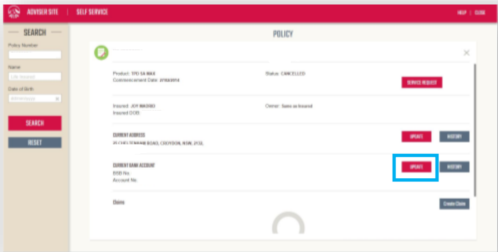
You will get a message informing you if the update was a success. Confirm all the required policy numbers for the Client are listed. If there are any policies missing for the Client, please search and update these policies separately.



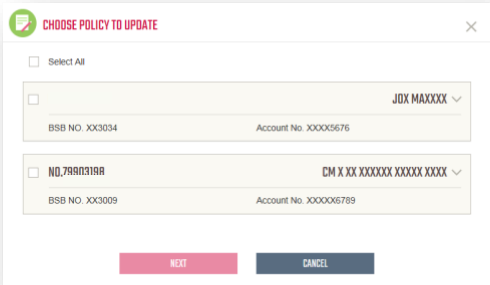
Change Bank Account Details

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

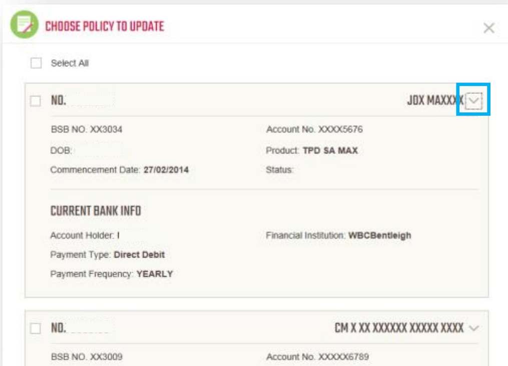
Select ***UPDATE*** to open the Change of Bank Account screen.



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

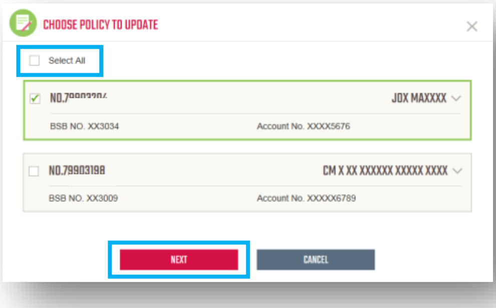


Select the ***drop-down arrow*** to view more policy and current bank information.



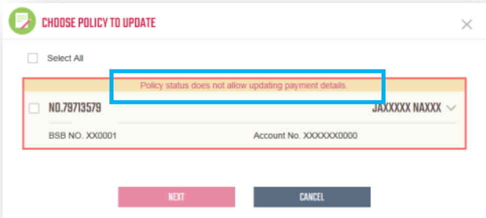
You can select one policy at a time to update with different payment details, or you can update several policies at once with the same payment details.

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

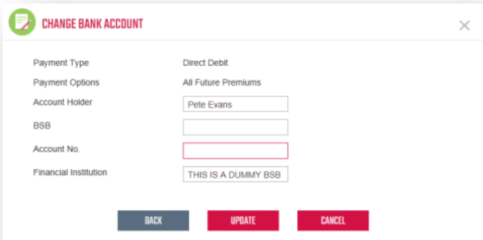


Certain policies need to be manually processed by AIA. If you are unable to process the change on Self Service a message will be displayed advising this.

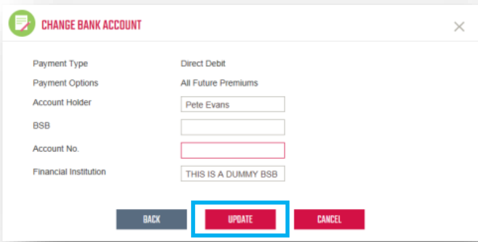
If you wish to update the payment information on one of these policies, please submit the new payment details by contacting AIA.



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



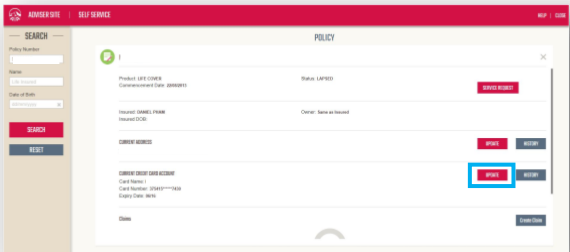
Select ***UPDATE*** when you are ready to submit your changes. A message will confirm if the update was successful.



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.



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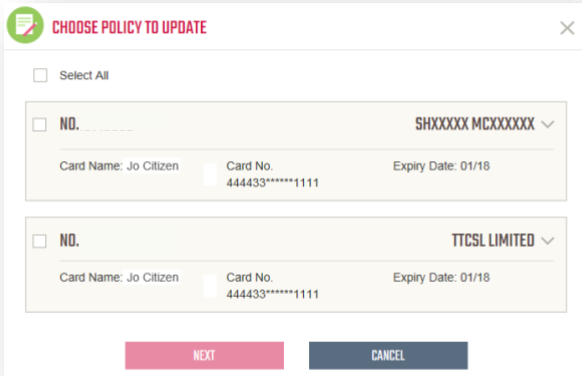
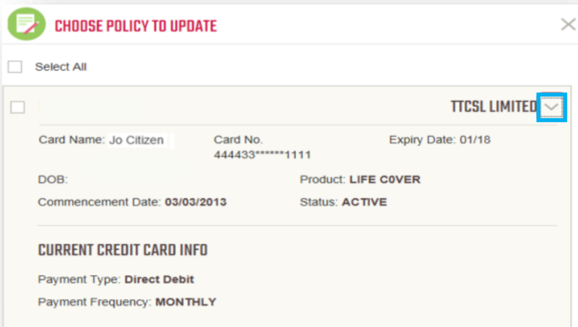
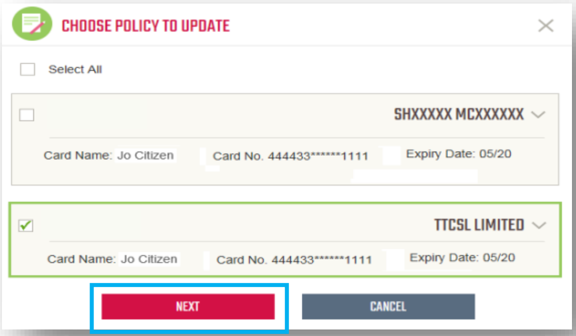


Select the ***drop-down arrow*** to view more policy and credit card information.

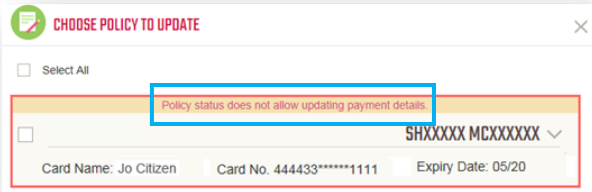


When you have chosen the policies you want to update, select ***NEXT***.



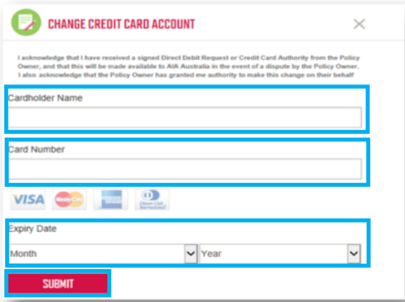
Certain policies need to be manually processed by AIA. If you are unable to process the change on Self Service a message will be displayed advising this.

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

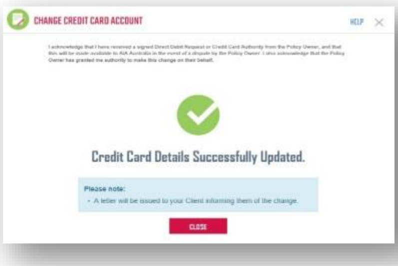


Type the ***Cardholder Name*** and ***Card Number*** and select ***Expiry Date.***

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



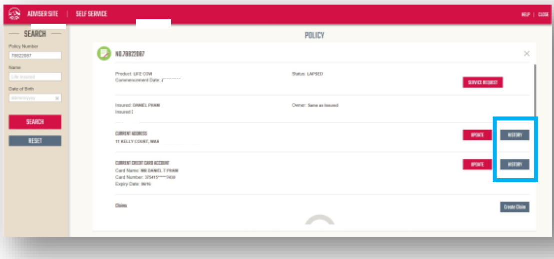
A message will confirm if the update was successful.



History Log

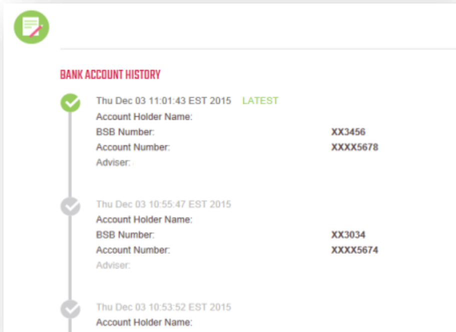
All changes made on a policy are stored in a History Log.

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.