



AIA Health Adviser Health Portal 'How to Guide'

June 2023



Contents

- Benefits to you
- How clients can benefit from the referral
- How can AIA Health help you achieve your business goals?
- Adviser Health Portal 'How to Guide'



What is the Adviser Health Portal?

The Adviser Health portal has been designed to provide Advisers with a seamless referral process, greater transparency on referral progress and outcomes, and a repository for all marketing and supporting collateral. This will give Advisers the ability to monitor referrals, understand existing referral pipelines, and follow up with customers in a meaningful way to support health referrals. The updated referral process will also remove the need to re-key adviser credentials for each referral, reducing the overall time required for each referral. With a central repository for all marketing collateral, it will ensure advisers have access to the most up to date materials for their own and clients use.



Benefits to you

- Transparency across referrals anytime/anywhere
- Reporting transparency & enhancements
- Understand pipeline and critical conversion metrics
- Removal of the need to key in AIA credentials every time a customer is referred
- Reduction in keying errors/follow-up
- Everything in the one place, i.e., Marketing collateral, referral system



How clients can benefit from the referral

A dedicated Health Insurance Specialist will spend up to 30 minutes:

- Completing a health insurance needs analysis
- Educating the client about Private Health Insurance and answering their questions
- Providing the client with a comprehensive comparison with their current cover
- Advising the client to stay with their current fund or providing the client with a tailored quote by email




How can AIA Health help you achieve your business goals?

- It can help retain and grow client value by providing a new touch point
- It can help strengthen your proposition around physical and financial wellbeing
- It can help provide new value to their clients
- It can help target a wide range of prospects and new demographics
- It can help diversify your income



Log in

You can log in to the AIA Adviser Health Portal using your existing [AIA Australia Adviser Site](#) username and password. We have incorporated a single sign-on process where your username and password will sync with your existing/updated AIA Australia Adviser Site username and password. You can access the AIA Adviser Health Portal using the following URL: <https://healthadviser.com.au/login>



AIA Health
with AIA Vitality

Username

Login Type

Adviser

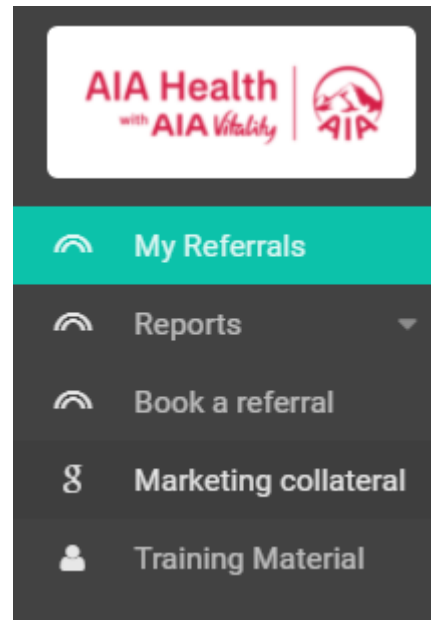
Login



Features & Navigation Tabs

You will note we have developed several features you can navigate through, which will allow you to actively manage your referrals and access information when you need it at your fingertips. The following slides will provide further details across the Adviser Health Portal features.

- My Referrals
- Reports
- Book a Referral
- Marketing Collateral
- Training Collateral



My Referrals Features

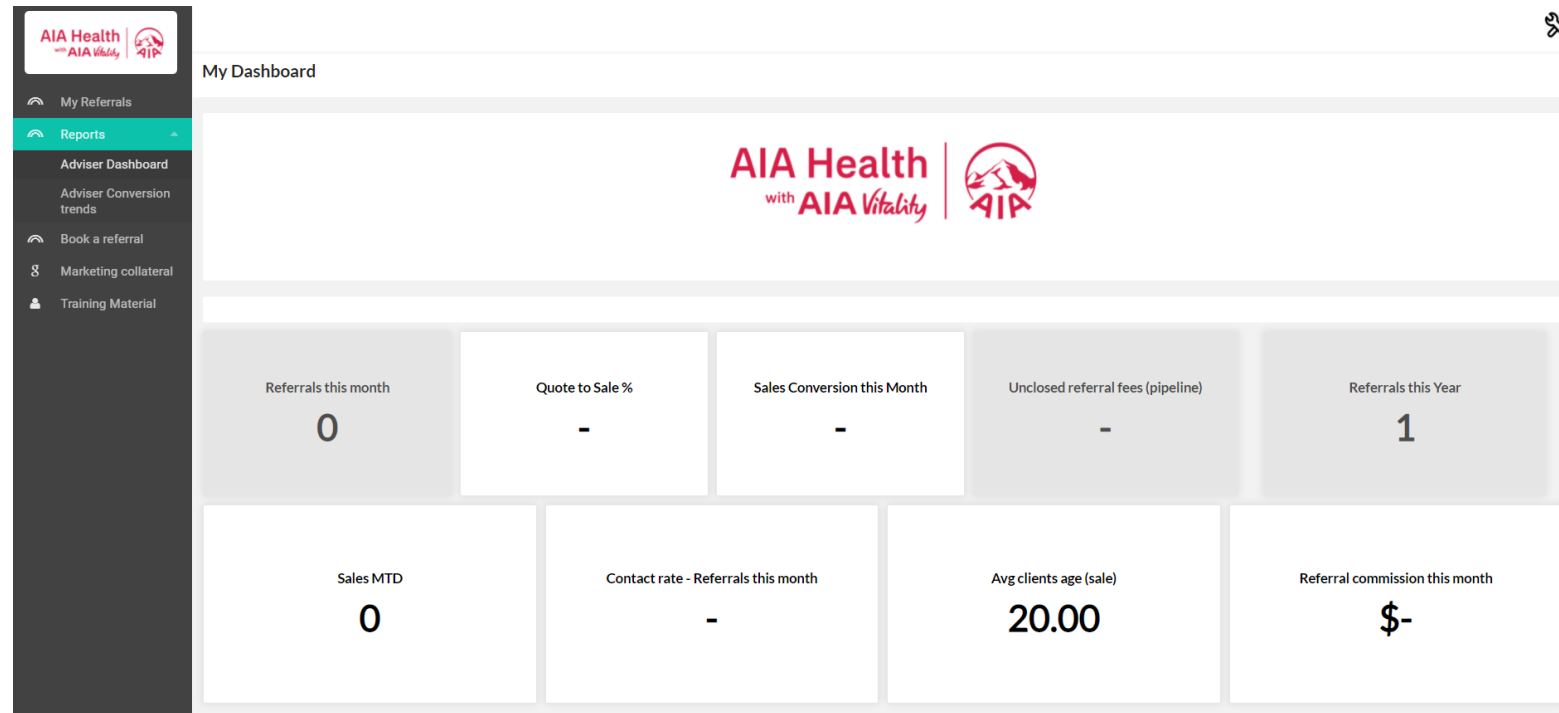
You now have complete transparency across your AIA Health referrals. You will note the Health Portal showcases your client's details, the progress of the referral, and the estimated referral fee. You also can extract your information using the download function. Note that the Portal can take up to 15 min to refresh, so allow the time from referral submission to it appearing within the Portal.

Date Referred	First Name	Last Name	Email	Phone	Consultant	State	Est. Referral Fee	Stage
18/02/2021	Oscillosoft	Test 9	osc.test9@ocillosoft.com.au	0432193321	Gerald Brown	VIC	\$0	Call rescheduled in future
17/02/2021	Oscillosoft	Test 7	osc.test7@ocillosoft.com.au		Gerald Brown		\$0	Contact attempted
17/02/2021	Oscillosoft	Test 8	osc.test8@ocillosoft.com.au		Gerald Brown		\$0	Call rescheduled in future
16/02/2021	Oscillosoft	Test 5	osc.test5@ocillosoft.com.au	0413829322	Gerald Brown	NSW	\$0	Closed – not proceeding
16/02/2021	Oscillosoft	Test 6	osc.test6@ocillosoft.com.au	0432193211	Stephen Vickery	NSW	\$0	Wrong Number
19/01/2021	Oscillosoft	Test 1	osc.test1@ocillosoft.com.au		Gerald Brown		\$0	Contact attempted
19/01/2021	Oscillosoft	Test 2	osc.test2@ocillosoft.com.au		Gerald Brown		\$0	Closed – Sale
19/01/2021	Oscillosoft	Test 4	osc.test4@ocillosoft.com.au		Gerald Brown		\$0	Contact attempted



Reporting Feature

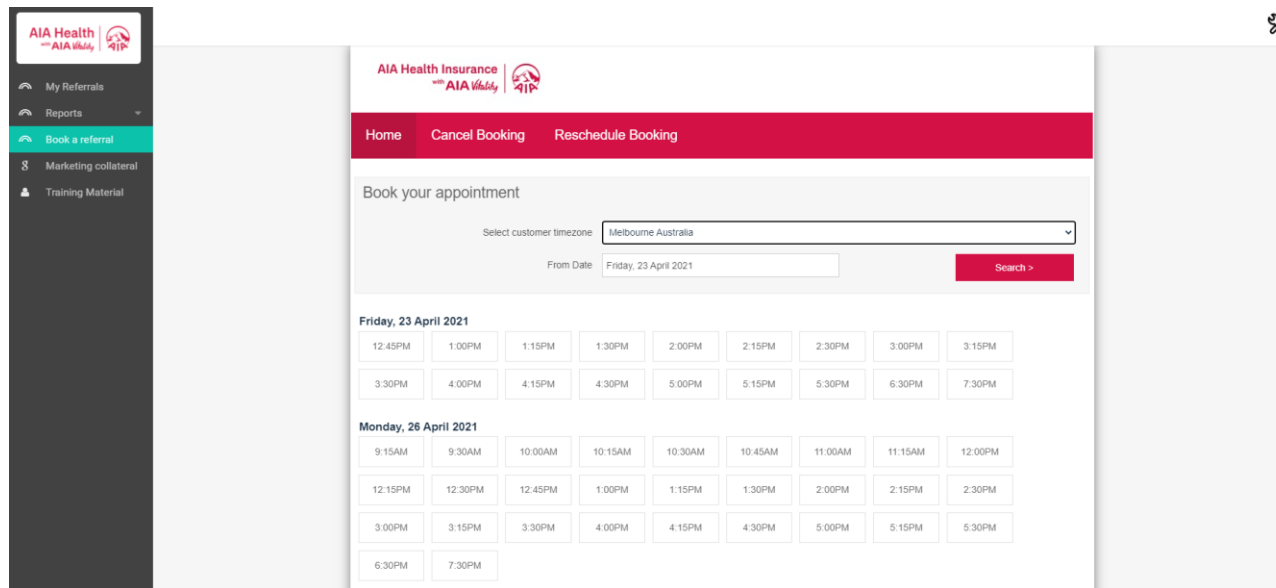
You now have access to your very own reporting dashboard under the 'Reports' tab, which details your referrals year-to-date and month-to-date along with conversion states and estimated referral fees earned.



Booking a Referral Feature

You can book your clients in for their Private Health review directly via the Adviser Health Portal. Click 'Book Referral', select the customer time zone, set a date and time by clicking on the available times, enter your client's details and follow the prompts. Your adviser details will pre-populate, which saves you time entering in your details. Confirmation of booking and reference number will be provided.

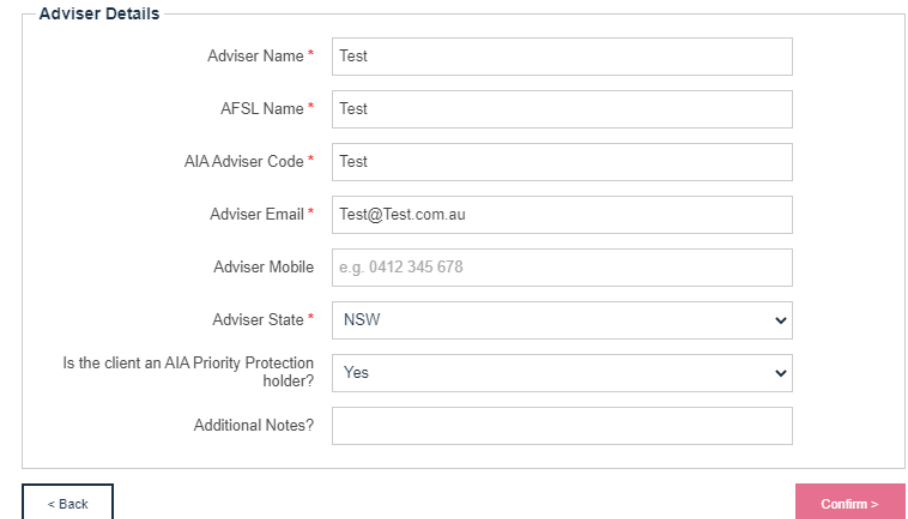
Remember, you can reschedule or cancel existing appointments via the 'Book a referral' tab.



The screenshot shows the 'Book a referral' interface. On the left is a dark sidebar with navigation options: My Referrals, Reports, Book a referral (highlighted), Marketing collateral, and Training Material. The main content area has the AIA Health Insurance logo and navigation tabs: Home, Cancel Booking, and Reschedule Booking. Below the tabs is a 'Book your appointment' section with a dropdown for 'Select customer timezone' (set to Melbourne Australia) and a 'From Date' field (set to Friday, 23 April 2021) with a 'Search >' button. The interface displays two days of available appointment times in a grid format:

Friday, 23 April 2021							
12:45PM	1:00PM	1:15PM	1:30PM	2:00PM	2:15PM	2:30PM	3:00PM
3:15PM	3:30PM	4:00PM	4:15PM	4:30PM	5:00PM	5:15PM	5:30PM
6:30PM	7:30PM						

Monday, 26 April 2021							
9:15AM	9:30AM	10:00AM	10:15AM	10:30AM	10:45AM	11:00AM	11:15AM
12:00PM	12:15PM	12:30PM	12:45PM	1:00PM	1:15PM	1:30PM	2:00PM
2:15PM	2:30PM	3:00PM	3:15PM	3:30PM	4:00PM	4:15PM	4:30PM
5:00PM	5:15PM	5:30PM					
6:30PM	7:30PM						



The 'Adviser Details' form contains the following fields:

- Adviser Name *
- AFSL Name *
- AIA Adviser Code *
- Adviser Email *
- Adviser Mobile
- Adviser State *
- Is the client an AIA Priority Protection holder?
- Additional Notes?

Navigation buttons: < Back (left) and Confirm > (right).



Marketing Collateral/Content

AIA Health Marketing Collateral is in the 'Marketing Collateral' tab in the Adviser AIA Health Portal.

AIA Health | AIA Vitality | AIA

- My Referrals
- Reports
- Book a referral
- Marketing collateral**
- Training Material

AIAH Customer Bro...

AIAH HLBL Flyer_1...

AIAH HLBL Flyer_1...

AIAH IFA Advice Do...

AIAH Lifetime Healt...

AIAH Member Guid...

AIAH Switching PHI ...

AIAH Why talk about...




Training Material

You can access the AIA Health education collateral under the 'Training Material' tab, which will launch a new window allowing you direct access to the content. The course generally takes between 20-30 minutes to complete, and by completing the training, you will receive 1.5 CPD points




AIA Health - Module 1: Government Legislation
Status: *Completed*
Percent Completed: 100%

Start the module




AIA Health - Module 2: Why AIA Health Insurance?
Status: *Completed*
Percent Completed: 100%

Start the module




AIA Health - Module 3: Product & Life, Health and ...
Status: *Completed*
Percent Completed: 100%

Start the module




AIA Health - Module 4: Adviser Experience
Status: *Completed*
Percent Completed: 100%

Start the module



AIA Health - Module 5: AIA Vitality
Status: *Completed*
Percent Completed: 100%

Start the module



**eApp
AIA Health Insurance Indicative Quote**

AIA Health - Module 6: eApp AIA Health Insurance I...
Status: *Not Started*
Percent Completed: 0%

Start the module



Password Reset & Account Activation

If you need to reset your password, you can do so by accessing the [AIA Australia Adviser Site](#) and clicking on the [Forgot Password](#) link.

If you do not have an [AIA Australia Adviser Site](#) account, please contact our [Client Development team](#) on 1800 033 490 or email au.adviserservices@aia.com

If you require further information, please contact your AIA Client Development Manager or Associate.

Adviser Login

Please enter your User Name and Password to login.

User Name

Password

If you have forgotten your password please click below
[Forgot Password](#)

If you do not have a login, please contact our Client Development team on 1800 033 490 or email au.adviserservices@aia.com

Lost Your Password?

Enter your username below, then click Continue.

User Name

[Click here](#) to go back to login screen.





HEALTHIER, LONGER,
BETTER LIVES

Thank you

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