



HEALTHIER, LONGER,
BETTER LIVES

AIA ADVISER PORTAL USER GUIDE

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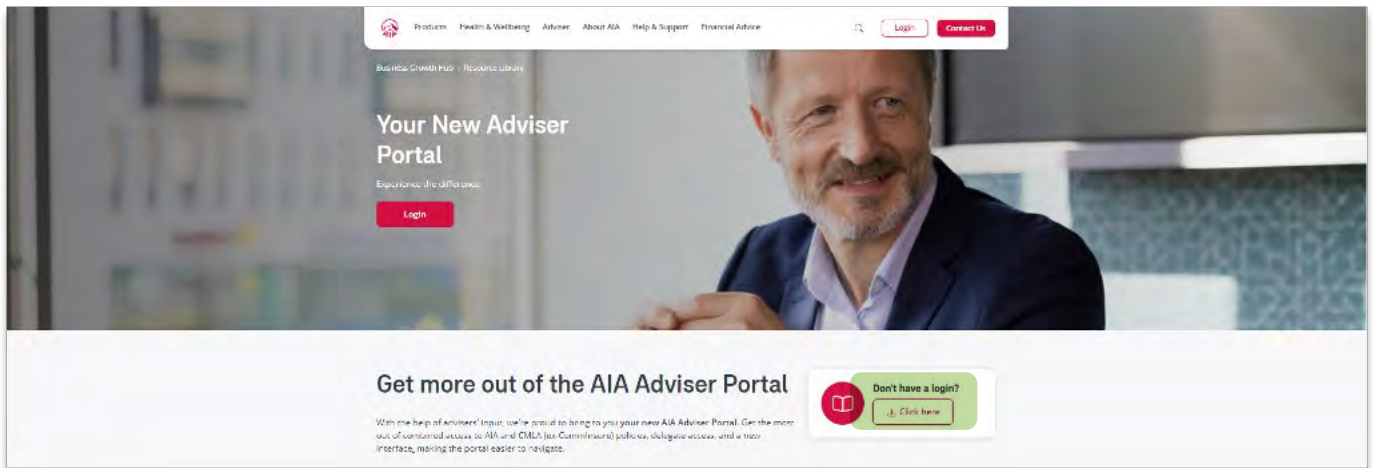
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1. Getting started

This user guide illustrates how to access and use the AIA Adviser Portal.

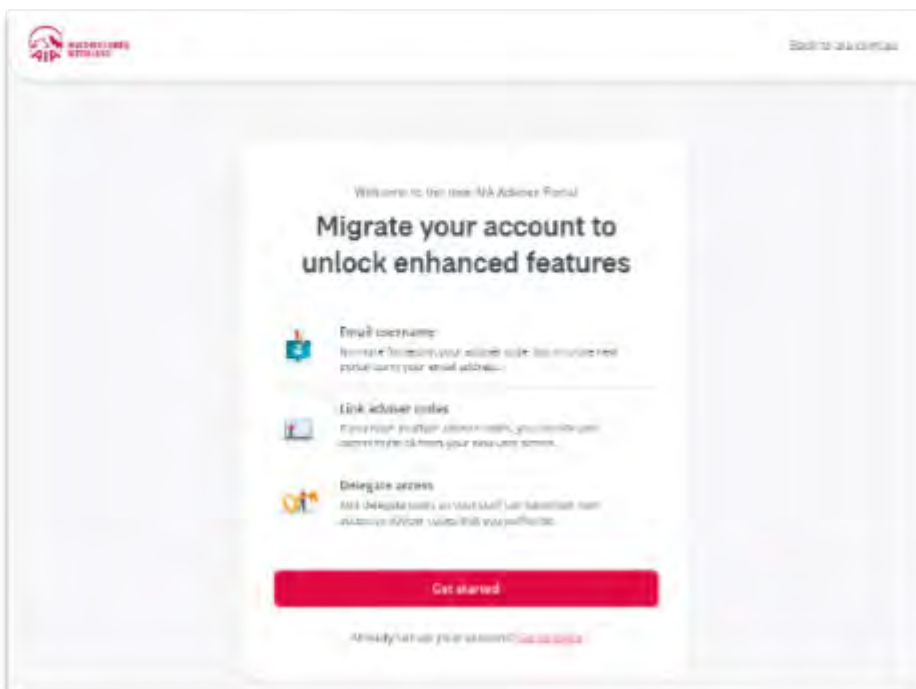
All active advisers and Licensees (via the nominated Responsible Individual user account) have access to the AIA Adviser Portal.

Using your AIA or ex-Commlnsure adviser code and password, access to the AIA Adviser Portal for the first time is via this [link](#) or from the AIA Business Growth Hub.



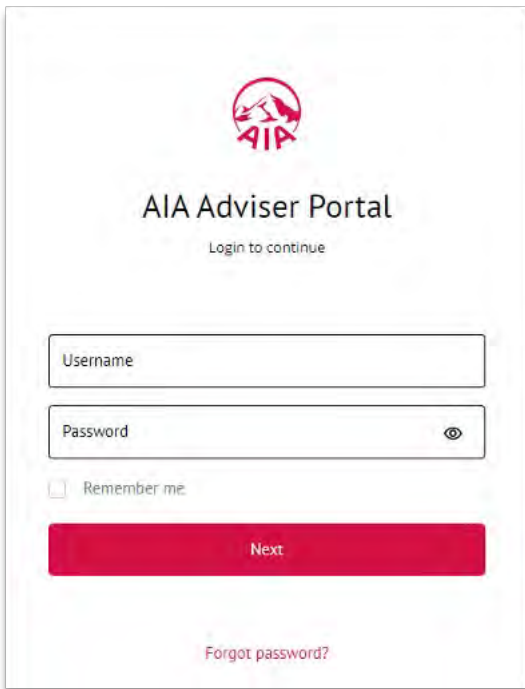
1.1 First time Logging in: Migration of existing adviser code access

For existing and active adviser codes, first time access to the AIA Adviser Portal will require you to migrate your access. To do this, click on this [Get Started](#) button shown below.



Watch this [video](#) for a step-by-step guide on how to migrate your existing access to the new AIA Adviser Portal.

1.2 Logging in to the Portal after migration completed



AIA Adviser Portal
Login to continue

Username

Password

Remember me

Next

[Forgot password?](#)

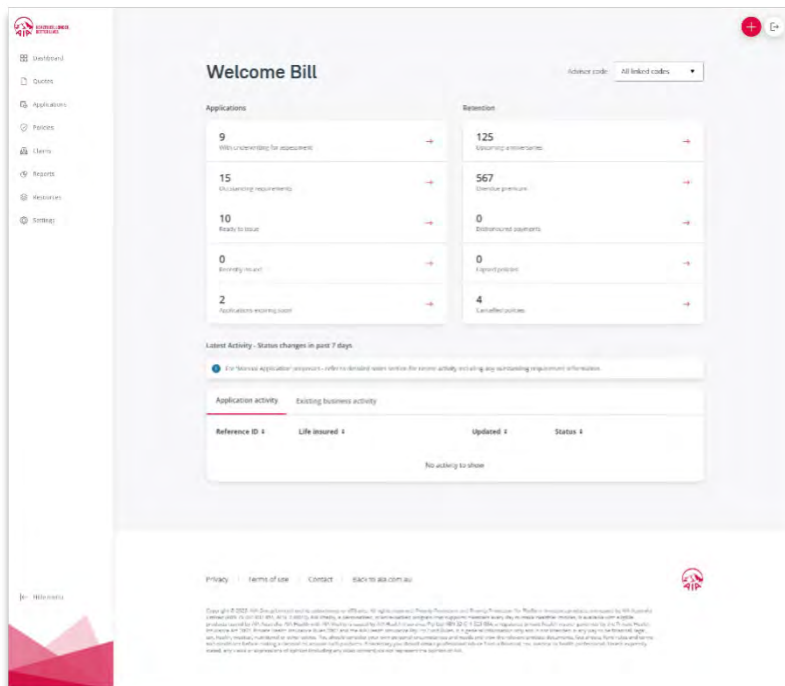
Once you have successfully migrated to the new AIA Adviser Portal, you can now log in via this [link](#) with your email address and password used to set up your access.

For security purposes, once you click on the **next** button, you will be asked to enter a One Time Pin (OTP) code that will be sent to your email address. Enter this code to finalise your log in.



Logging into the new adviser portal is via your email address and password. You no longer need your adviser code to log in.

2. Dashboard



Welcome Bill

Adviser code: All linked codes

Applications	Retention
9 Applications for assessment	125 Existing applications
15 Outstanding requirements	567 Existing premiums
10 Ready to issue	0 Discontinued policies
0 Security issues	0 Expired policies
2 Applications requiring cost	4 Cancelled policies

Latest Activity - Status changes in past 7 days

For 'New application' - refers to desired user action for various activity including any scheduling requirement information.

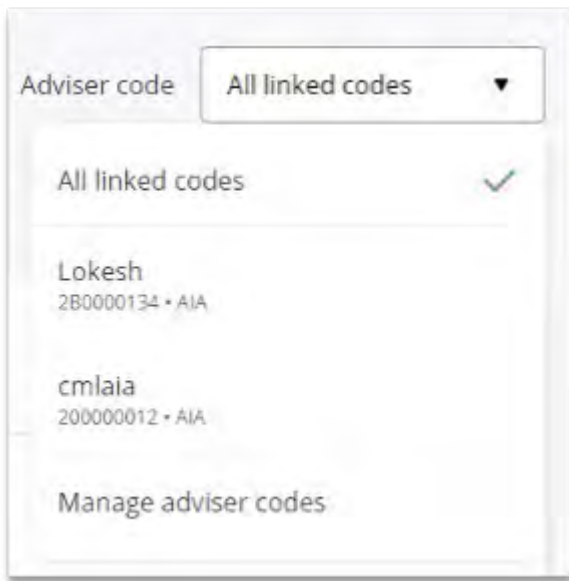
Application activity | Existing business activity

Reference ID	Life insured	Updated	Status
No activity to show			

Privacy | Terms of use | Contact | 1800 100 000

Once logged in, you will see the Dashboard. This interactive dashboard provides a quick glance into 2 sections: Applications (New Business) and Retention (In-Force). The dashboard will default to show you all the applications and policies that are assigned to all your adviser codes.

2.1 Switching between different adviser codes and/or consolidated view



To switch to a specific adviser code, enabling the portal to display information specific to an adviser code, rather than a consolidated view, you can select the relevant adviser code via the drop-down box in the top right-hand corner of the page.

Once the adviser code is selected, the dashboard will re-refresh and display only the policies for that code.

2.2 Applications Dashboard

The applications dashboard has 5 tabs plus additional information displayed at the bottom of the dashboard showing applications with status changes in the last 7 days.

Category	Count
With underwriting for assessment	9
Outstanding requirements	15
Ready to issue	10
Recently issued	0
Applications expiring soon	2
Expanding portfolios	125
Overdue policies	567
Discontinued policies	0
Locked policies	0
Cancelled policies	4

1 With underwriting for assessment

2 Outstanding requirements

3 Ready to issue

4 Recently issued

5 Applications expiring soon

Click on the relevant tab or red arrow to show further information in each section.

2.2.1 With underwriting for assessment

The dashboard shows a table of applications with the following columns: Life insured name, Application ID #, and Updated #.

Life insured name	Application ID #	Updated #
Testerka Data	A021205	30 Oct 2023
Scenario 1 (Deferred)	A021205	20 Jul 2023
Scenario 1g	A021205	28 Jun 2023
Scenario 1f (Scenario 1f)	A021205	10 Jul 2023
Scenario 1e (Filing)	A021205	20 Jul 2023
Scenario 1 (Deferred)	A021205	10 Jul 2023
Cost of Insurance	A021205	10 Jul 2023

The dashboard shows the life insured name, application ID and last updated date.

Users can then click through each application to view further details.

The screenshot shows the details for Application A021205, Testerka Data. The page includes tabs for Application details, Proposal, Requirements, and Notes. Two sections are highlighted with callouts:

Payment Summary: Shows premium summary, including Stamp Duty, Vitality discounts and Vitality fees if applicable.

Item	Value
Total yearly premium	\$117.85
Yearly stamp duty	\$0.00
AIA Vitality discount applied	✖
AIA Vitality fee	✖

Application Information: Shows all the relevant information for the application, including contact details and linked proposals.

Life insured name	Testerka Data
Date of birth	10 Jan 1980
Submission date	30 Oct 2023
Expiration date	28 Jan 2024
Application days open	42
Underwriter name	TBA
UW contact number	1800 033 490
AIA Australia email	infohub@aia.com
Product Type	Priority Protection
Proposals in application	00012867

Payment Summary: Shows premium summary, including Stamp Duty, Vitality discounts and Vitality fees if applicable.

Application Information: Shows all the relevant information for the application, including contact details and linked proposals.

The screenshot shows the 'Proposal' tab selected. The application ID is 00012867. The policy name is 'Testerka Data'. The payment frequency is 'HALF_YEARLY', the term is 'No', the commission structure is 'Upfront 2020', and the premium class is 'P100'. A table lists the following costs:

Instalments premium payable	\$5.45
Instalments stamp duty	\$0.00
Policy fee	\$49.40
AIA Vitality fee	\$0.00
Total instalment payable	\$54.85

The policy description is 'XDT - Life Cover, Stepped, Expiry age 100'.

Proposal:

Premium information is shown here, such as mode, structure, and dial downs if applicable, policy fees, AIA Vitality fees and total premium.

The screenshot shows the 'Requirements' tab selected. It features a 'Requirement upload' section with a text box and two buttons: 'Upload requirement' and 'View uploaded documents'. Below this is an 'Underwriting requirements' section which currently shows 'No activity to show'. At the bottom, there is an 'Admin requirements' section with a note about 'Credit Card Authority' and a request to provide a 'Direct Debit or Credit Card Authority' form.

Requirements:

In here you will see any Underwriting or Admin Requirements.

You are also able to upload documents directly to the portal for the UW/Admin team to progress the application.

The screenshot shows the 'Notes' tab selected. It displays a list of notes under the heading 'Notes to the adviser':

- 30 Oct 2023:** Please note that additional underwriting requirements may be requested following assessment by our underwriters.
- 30 Oct 2023:** If your application is for new cover, you may be eligible for interim accident cover for up to 90 days for the following cover, based on the types of cover you have applied for in your application:
 Interim Accidental Death Cover
 Interim Accidental Total and Permanent Disablement Cover
 Interim Accident Crisis Recovery Cover
 Interim Accident Income Protection Cover
 Exclusions apply. Please see your product disclosure document for the full terms and conditions regarding this cover.
- 30 Oct 2023:** If we have requested information for external parties, we have used the authority forms you provided with your application to do this. If you do not agree with this request for information, you can ask us to review our request.

Notes:

Notes tab will display any notes left by an underwriter/assistant pertaining to the application.

2.2.2 Outstanding requirements

Life issued #	Application ID #	Updated #	Pending requirements #
TEST01 ACV 000	13021712	18 Aug 2023	Admin requirements
TEST01 ACV 000	13022430	18 Sep 2023	Admin requirements
TEST01 ACV 000	13022428	18 Sep 2023	Admin requirements
Testor - Health	4421272	29 Aug 2023	Admin requirements
TEST TEST	13022056	18 Sep 2023	Admin requirements
Stevens Dr - Full and Auto/Health	4421152	27 Oct 2023	Admin requirements
Stevens Dr - Health/Full/Reg	4421155	18 Aug 2023	Admin requirements

There are 3 main types of requirements:

- ! Admin requirements
- ! Underwriting requirements
- ! Underwriting & Admin requirements

In addition to the above, this tab will also display any Manual Applications.

- ! Manual Application

2.2.3 Ready to issue

Life issued #	Application ID #	Updated #
Therapy D - Health/Car	4421166	25 Sep 2023
Leah's Test	4421180	16 Sep 2023
Test Testor	4421178	13 Sep 2023
Only Health	4421172	16 Sep 2023
Accident Testor - H	4421181	15 Aug 2023
Stevens' Data Testor 2	4421144	28 Jul 2023
Stevens' Testor	4421141	28 Aug 2023

Ready to issue:

Applications that are ready to be issued into production will be displayed here.

Usually, they are pending Adviser Instructions for commencement date.

2.2.4 Recently issued

Applications	Revisions
9 1877 Underwriting requirements	125 Underwriting requirements
15 Outstanding requirements	567 Underwriting requirements
10 Ready to issue	0 Underwriting requirements
0 Ready to issue	0 Underwriting requirements
2 Applications in progress	4 Underwriting requirements

Reference ID #	Life issued #	Updated #	Status #
No activity to show			

Recently issued:

Recently issued policies will sit in this dashboard for up to 7 days. It will also be displayed in the bottom section of the dashboard. After 7 days, it will be removed from the dashboard and will only be shown under the Policies menu (in-force).



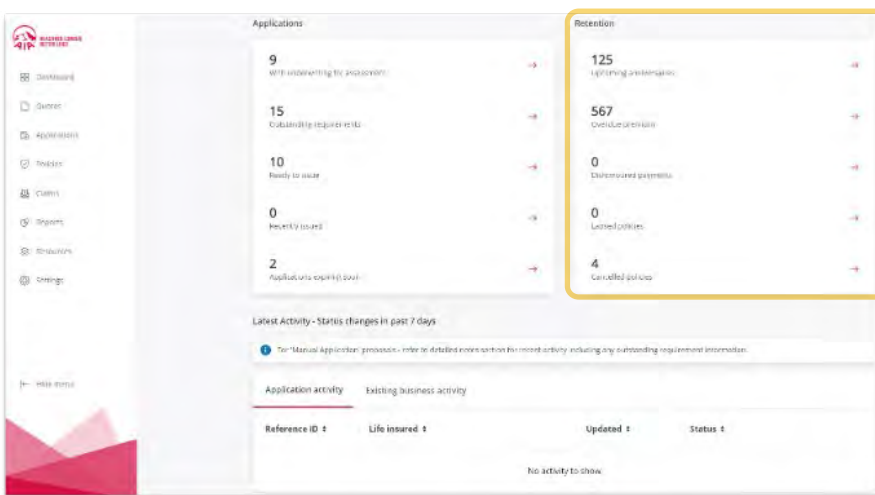
Applications expiring soon:

Applications that are expiring soon means they have been in pipeline for more than 75 days – these applications will show here until the 90th day, where it will be sent for cancellation.



Advisers should use this dashboard to follow up progress/outstanding requirements with clients, as the application will soon expire.

2.3 Retention Dashboard

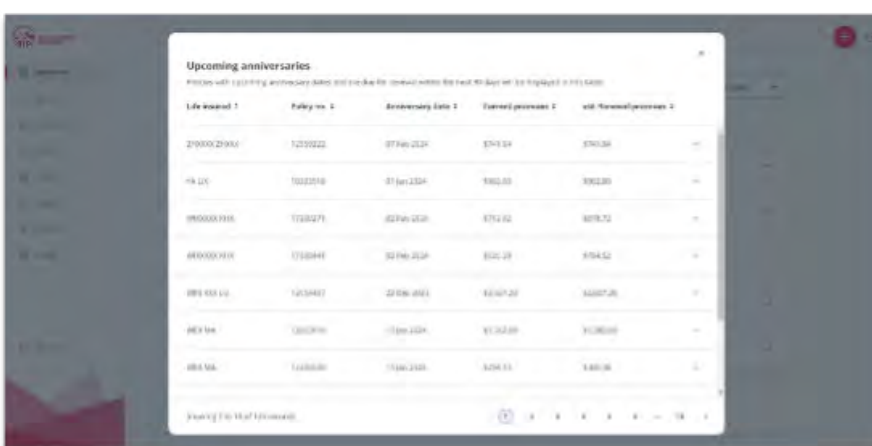


The retention dashboard has 5 tabs showing policies that meet the following criteria:

- 1 Upcoming anniversaries
- 2 Overdue premium
- 3 Dishonoured payments
- 4 Lapsed policies
- 5 Cancelled policies

You will also see existing business activity in the bottom section of the dashboard page.

2.3.1 Upcoming anniversaries



Upcoming anniversaries:

Policies with upcoming anniversaries within 90 days, will be displayed here until the policy passes anniversary. This page shows the policy number, anniversary date, current prem and est. prem on renewal.

Once the policy passes anniversary, it will be removed from this section of the dashboard and display elsewhere in the portal (ie. In-force policy menu, lapsed policies dashboard etc).

2.3.2 Overdue premium

Overdue premium
Policies with premium overdue will be displayed in this table. Policy will be displayed until payment is received or lapsed.

Life insured †	Policy no. †	Paid to date †	Overdue amount †	Lapse date †
20000000000	2014114	27 Sep 2023	\$2,846.27	30 Jan 2024
2000 9H6	12272140	13 Sep 2023	\$823.05	28 Nov 2023
219 9H9	2020883	23 Sep 2023	\$1,740.00	19 Nov 2023
219 0000	1220387	29 Aug 2023	\$9,740.00	27 Oct 2023
245 XXX 4X	2000440	24 Aug 2023	\$347.77	23 Oct 2023
6084 5d	1242085	28 Aug 2023	\$4,099.79	27 Oct 2023
013000 1A	1236333	18 Sep 2023	\$1,802.21	30 Nov 2023

Showing 1 to 10 of 147 records

Overdue premium:

Policies that are overdue for payment are displayed here.

The lapse date is also highlighted here if the policy is not renewed.

2.3.3 Dishonoured payments

Dishonoured payments
Policies with dishonoured payments will be displayed in this table. The policy will be displayed until payment is received or policy lapses.

Life insured †	Policy no. †	Dishonour date †	Next debit †	Lapse date †
BA TES/DATA	00012679	01 Sep 2023	22 Oct 2023	22 Sep 2024

Showing 1 of 1 records

Dishonoured payments:

This dashboard will show the policies that have had the premium payment dishonoured.

2.3.4 Lapsed policies

Lapsed policies
Policies with premium payment overdue by 61 days will be displayed in this table. The policy will appear for 90 days following the paid to date.

Life insured †	Policy no. †	Paid to date †	Premium frequency †	Lapsed date †
YOX XXX MA	61711540	09 Aug 2023	Annual	10 Oct 2023
ROXXX CHXX	61620952	15 Aug 2023	Annual	10 Oct 2023
ROXXX CHXX	61620676	15 Aug 2023	Annual	10 Oct 2023
NIXXXX NAXXXXXXXXXX	68507650	07 Aug 2023	Annual	09 Oct 2023
RIXXXX DAXXX	19211411	04 Aug 2023	Annual	09 Oct 2023
MAX LAX	10776129	13 Aug 2023	Annual	10 Oct 2023
RYE GAXXXXX	67803171	08 Aug 2023	Monthly	09 Oct 2023

Showing 1 to 10 of 16 records

Lapsed policies:

Policies that have lapsed within the last 90 days will be displayed here. This includes policies that have not been paid to date and have exceeded their lapse date.



Once it exceeds the 90-day mark, you will no longer be able to view the details via the portal and will need to apply for reinstatement with a DOCGH or comply with any other reinstatement rule requirements.

2.3.5 Cancelled policies

Life insured	Policy no.	Valid to date	Premium frequency	Cancellation date
0704X224000	0730006	23 Aug 2023	Monthly	07 Dec 2023
0704X224000	0001798	08 Sep 2023	Monthly	08 Dec 2023
000000000	0000000	28 Aug 2023	Monthly	01 Dec 2023
000000000	0000000	28 Aug 2023	Annual	07 Dec 2023

Cancelled policies:

Like lapsed policies, this will show policies that have been cancelled (instead of lapsed) and will continue to show for 90 days.



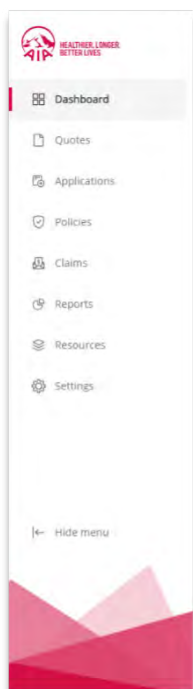
Cancellation rescindment rules will apply.

2.4 Latest Activity – Status changes in past 7 days

Reference ID	Life insured	Updated	Status
A021205	Tester ka Dula	30 Oct 2023	Under assessment

At the bottom of the dashboard page, this section displays a summary of activity from the top two dashboards (Applications and Retention) within a 7-day period. Think of it as a news feed for you to stay up to date with your portfolio for AIA and ex-Commlnsure policies.

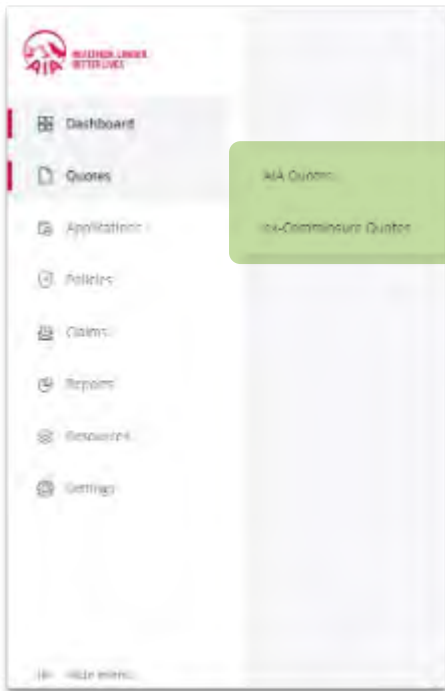
3. Side Menu



On the left-hand side of the portal, there is a side menu with the following sub-menu items:

- **Dashboard** – takes you back to the landing page (dashboard)
- **Quotes** – option to access the AIA quotes software (eApp) or the ex-Commlnsure quotes software (myQuote) via Single Sign On (SSO)
- **Applications** – Provides a summary of applications in progress as well as navigate to your draft applications (via SSO to AIA eApp software)
- **Policies** – A summary view of all your In-Force policies and Out-of-force policies (90 days). This section is also where you view policy information and access self-service to update client details
- **Claims** – Provides a summary of claims data and access to information regarding the claim
- **Reports** – A one stop shop for all your AIA and ex-Commlnsure reporting requirements as well as where you access Commission Statements
- **Resources** – Access to all the Forms and Resource Library available in the portal
- **Settings** – Update user profile, set-up/maintain delegate user access, set-up/maintain your adviser codes, Data Feed to your selected planning software (AIA policies only) and management of your email preferences for AIA subscriptions/marketing communications.

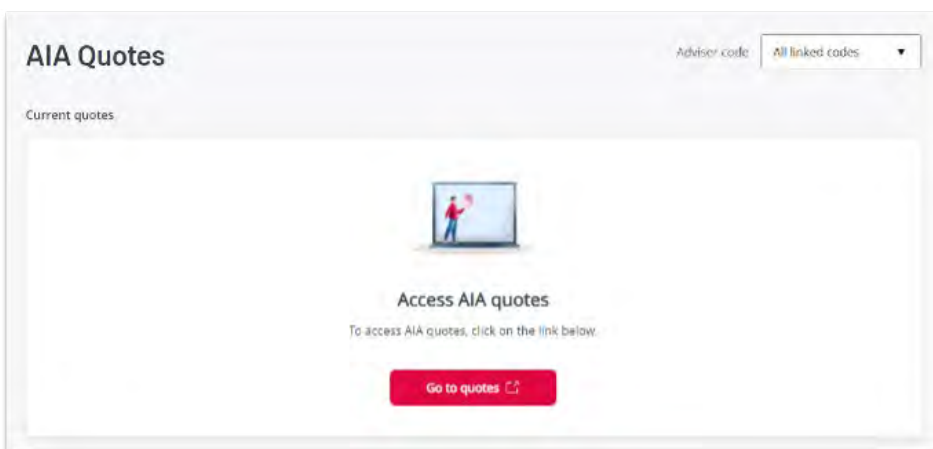
4. Quotes



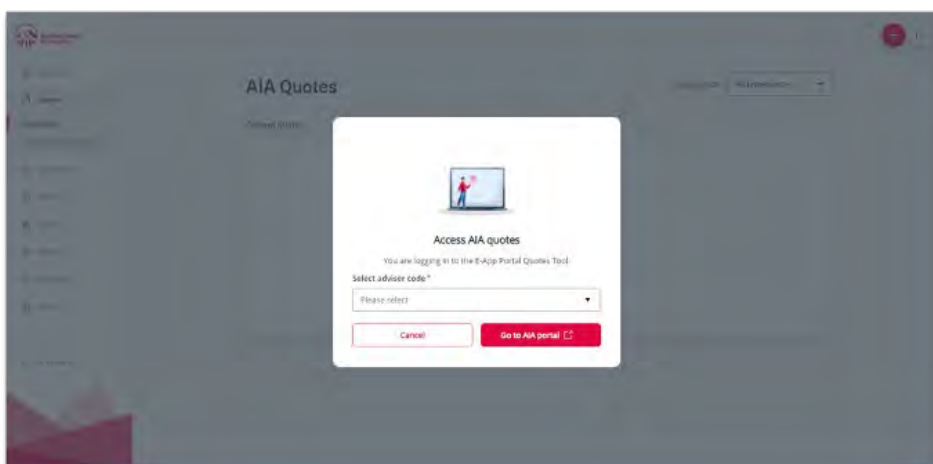
From the side menu, you can access the Quoting platforms for AIA or ex-Commisnure.

This will be available as a single sign-on (SSO) into eApp for AIA Quotes and MyQuote for ex-Commisnure Quotes – only users who have access to those systems can SSO into the QAT platforms.

4.1 AIA Quotes

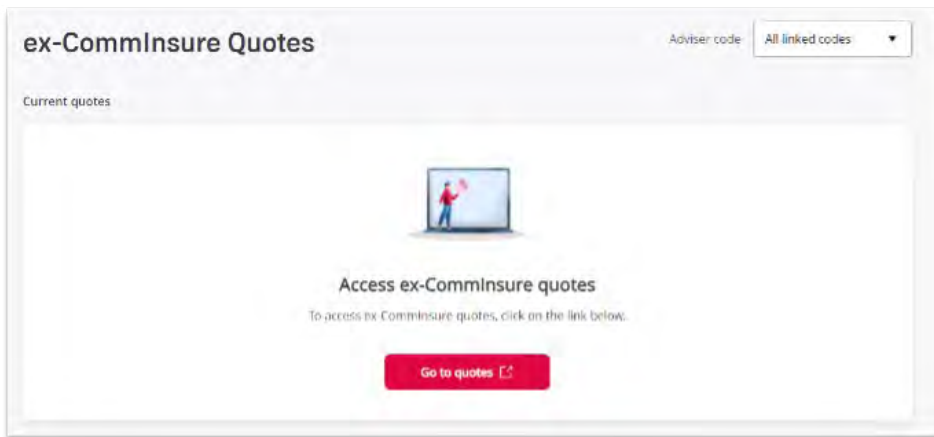


To access AIA quoting platform, select AIA Quotes. You will be required to select one of your AIA adviser codes (if you have multiple codes) to log into eApp portal via SSO as shown in the illustrations below.



Once you have logged into eApp, you will be taken to the quoting portal. You can return to the AIA Adviser Portal at any time as eAPP will be open in a new browser window.

4.2 ex-CommInsure Quotes



To access ex-CommInsure quoting platform, click on exCommInsure Quotes and then click on the **go to quotes** button. This will take you to the MyQuote portal. You can return to the AIA Adviser Portal any anytime as MyQuote will be open in a new browser window.

If you have more than one ex-CommInsure adviser code, you will need to select which code you want to access MyQuote.

5. Applications

From the side menu, you can access your Applications (AIA new business applications and draft applications only). This function is not available for ex-CommInsure applications as this book is closed to new business and MyQuote is only applicable for quoting cancel and replace quotes.

5.1 Applications in Progress

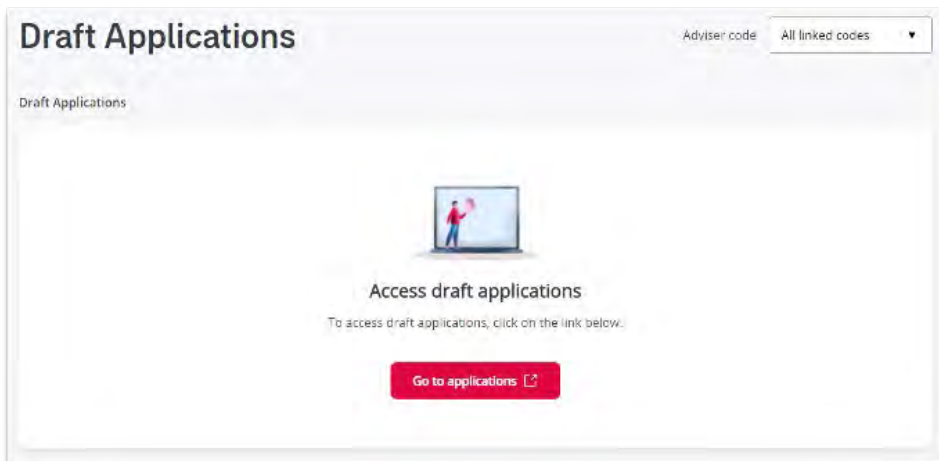
The information displayed in this section is similar to the information displayed in the Applications dashboard. This section provides a consolidated view of all applications in progress and their status.

Application ID #	Proposal ID #	Life Insured #	Updated #	Status #
A021295	00012947	Peterka Dora	04 Oct 2023	Under assessment
A021775	00012844	Fcd Tester	19 Oct 2023	Ready to issue
A021866	00012831	Tilmany Dorendora	25 Sep 2023	Ready to issue
A021112	00012899	Efele Elefele	8 Sep 2023	Ready to issue
A021199	00012797	Lizbill Test	8 Sep 2023	Ready to issue
A021190	00012794	Data Multiproposal	8 Sep 2023	Under assessment
A021099	00012752	JDNew Data	6 Sep 2023	Ready to issue
A021088	00012793	SanTWOR Data	5 Sep 2023	Cancelled or withdrawn
A021092	00012788	SanTWORdata Connected	5 Sep 2023	Declined
A021092	00012788	SanTWORdata Tester	4 Sep 2023	Under assessment

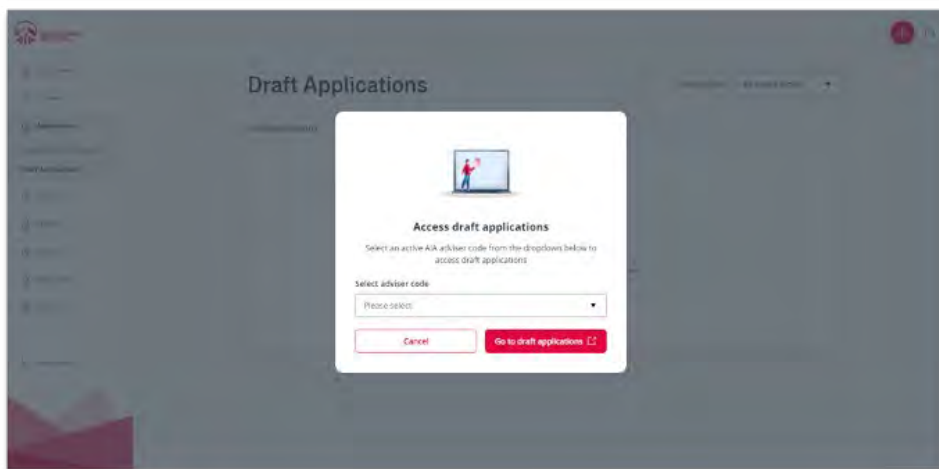


By clicking on any of the table headings, you can sort the data in “order” or “reverse order” for that heading, to aid searching for a specific case. Alternatively enter part of any data field displaying in the search box and closest matches will only appear in the list.

5.2 Draft Applications

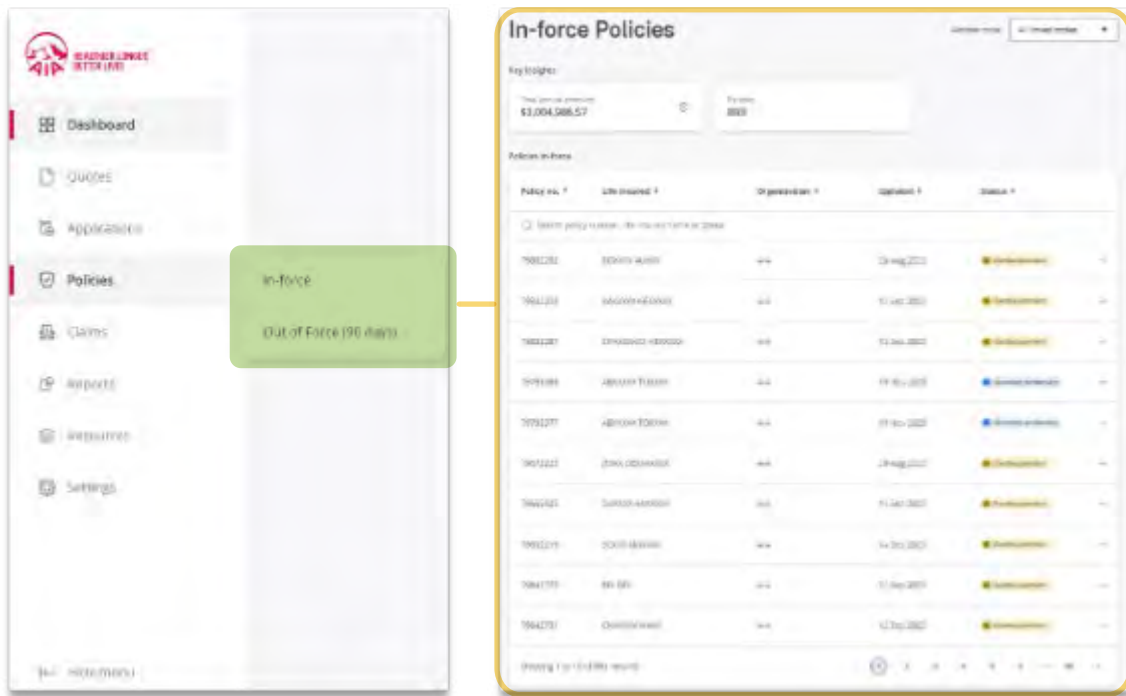


Click on the **Draft Applications** option to proceed to the AIA eApp portal via SSO. You will need to select the Adviser Code you want to access the draft applications.



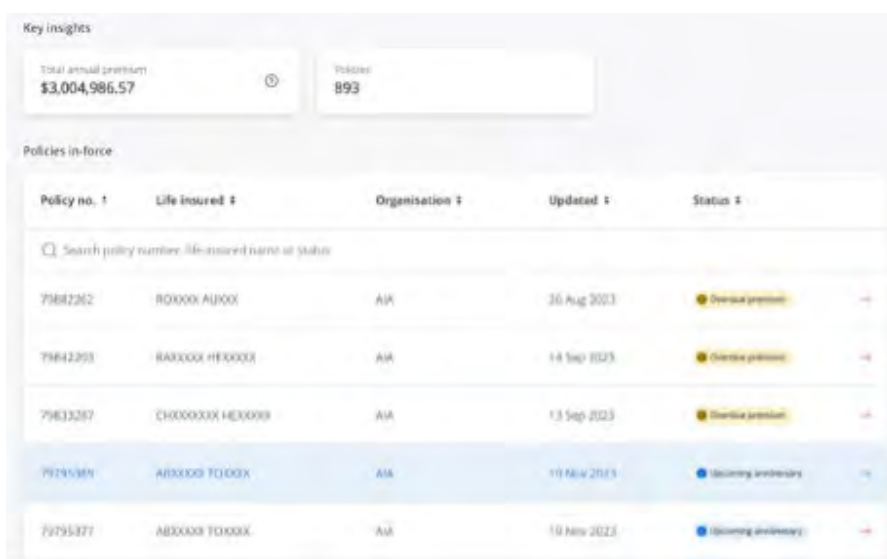
6. Policies

From the side menu, you can access the Policies database, which is split into In-force and Out of force (within 90 days). These screens function the same, so we will only highlight the information displayed in the "In-force" section.



To view the total policies and total annual premiums for a specific adviser code, select the adviser code from the top drop-down list.

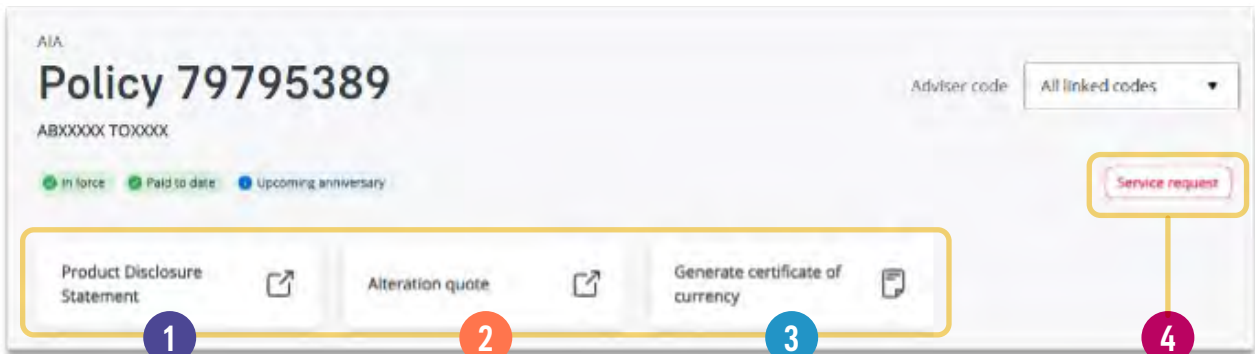
6.1 Detailed policy view



Within the In-force/Out of Force (90 days) section, you can view detailed policy information by clicking on the relevant policy as illustrated here.

6.1.1 Self-Service policy documents and update client information

When you click into a policy, the top section will display the self-service functions available for that policy. This function is only available for AIA Priority Protection Policies.



Product Disclosure Statement

This tile will redirect you to the PDS database

Alteration quote

This tile will redirect you to the Requote tool

Generate certificate of currency

This tile will enable you to generate a COC for policies that are in-force (including policies where the premium is overdue).

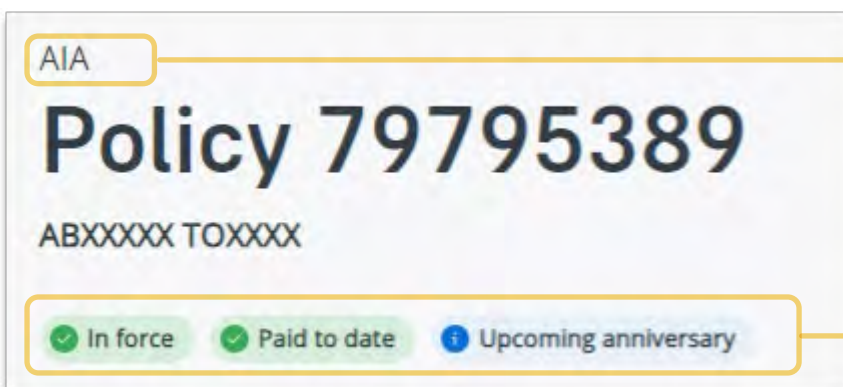
Service request

This button will take you to the Self-Service portal (Evolve), allowing you to make changes to some client information. This function is only available for AIA Priority Protection Policies.



The Service request function is only available where a Financial Adviser Authority has been provided by the client. If no authority has been submitted, an error message will be displayed in Evolve.

6.1.2 Policy details



The policy details screen will display information such as:

- 1 AIA or ex-CommInsure policy
- 2 Policy Statuses

Policy 79795389
 ABXXXX TOXXXX
 Admin code: All linked codes

Product Disclosure Statement | Alteration quote | Generate certificate of currency

Policy details | Life insureds | Cover | Correspondence | Beneficiaries

1 Indicative anniversary premium (90 to 30 days prior to anniversary)

Including indexation	\$2,018.35
Excluding indexation	\$1,207.30
Anniversary date	10 Jan 2024

2 Policy details

Product name	Priority Protection (2013)
Commencement date	10 Jan 2014
Linked policies	79795377
Policy owner	ABXXXX TOXXXX
Address	73 XXXXXXXXXX, Billy 2075 NSW
Email address	11115552519@aiaportal.com
Phone number	4444444444

3 Premium details

Indicative anniversary premium	\$1,821.09	Payment frequency	Annual	Next due date	10 Jan 2024
Payment method	Direct Debit				
BSB number	062001				
Account number	1234567				
Premium structure	Step-up				
AIA Vitality discount (Life 20)	N/A				
AIA Vitality discount (Future Statement)	N/A				
AIA Vitality fee	N/A				
AIA Health discount	N/A				

4 Commission details

Commission structure	CCM
Initial percentage	21%
Renewal percentage	18%

Within the Policy details tab, there are 4 sections as illustrated in the following image:

- 1 Indicative anniversary premium (90 to 30 days prior to anniversary) or Anniversary Premium as per anniversary letter or Overdue details** – For policies that have a status of Upcoming anniversary or Overdue Premium.
- 2 Policy details**
 The policy details tab will display relevant information such as:
 - Renewal premium/Indicative premium
 - Policy Anniversary date
 - Product name
 - Commencement date
 - Linked policies
 - Owner and contact information
 - Current premium details
 - Payment details
 - Discounts applicable
 - Commission details
 and more....
- 3 Premium details**
- 4 Commission details**

AIA
Policy 79795389
 ABXXXX TXXXXX

Advisor code: All linked codes

[Inforce](#)
[Policy in force](#)
[Upcoming anniversary](#)
[Service request](#)

[Product Disclosure Statement](#)
[Alteration quote](#)
[Generate certificate of currency](#)

[Policy details](#)
[Life insured](#)
[Cover](#)
[Correspondence](#)
[Beneficiaries](#)

Details

Life insured	ABXXXX TXXXXX
Gender	Female
Date of birth	25 Feb 1971
Age next birthday	53
Smoker status	Non-Smoker
Occupation	
Occupation category	AA
AIA Vitality	
AIA Health insurance	

Contact details [Full](#)

Phone number	0000000000
Email address	9990837519@aiaassist.com
Address	23 XXXXXXX XXXXX, Rilly 2075 NSW

The **Life insured** tab will display relevant information such as:

- DOB
- Smoker status
- Occupation and category
- Vitality and/or Health links
- Contact details

[Policy details](#)
[Life insured](#)
[Cover](#)
[Correspondence](#)
[Beneficiaries](#)

ABXXXX TXXXXX

Crisis Recovery, Comprehensive, Stepped, Crisis Expiry age 70, LOI Expiry age 100 [Inforce](#)

Sum Insured	618,178.30
Instalment premium	\$1,507.81
Commencement date	15 Jun 2014
Premium structure	Stepped
TPD Definition	LOI
Special terms	

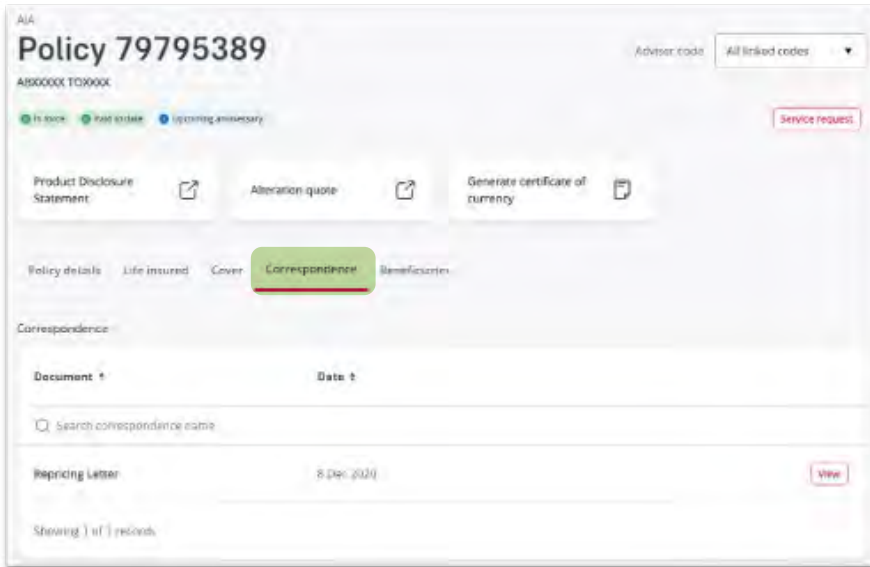
Crisis Recovery Buy Back, Stepped, Expiry age 65 [Inforce](#)

Crisis Reinstatement, Stepped, Expiry age 65 [Inforce](#)

The **Cover** tab will display relevant information such as:

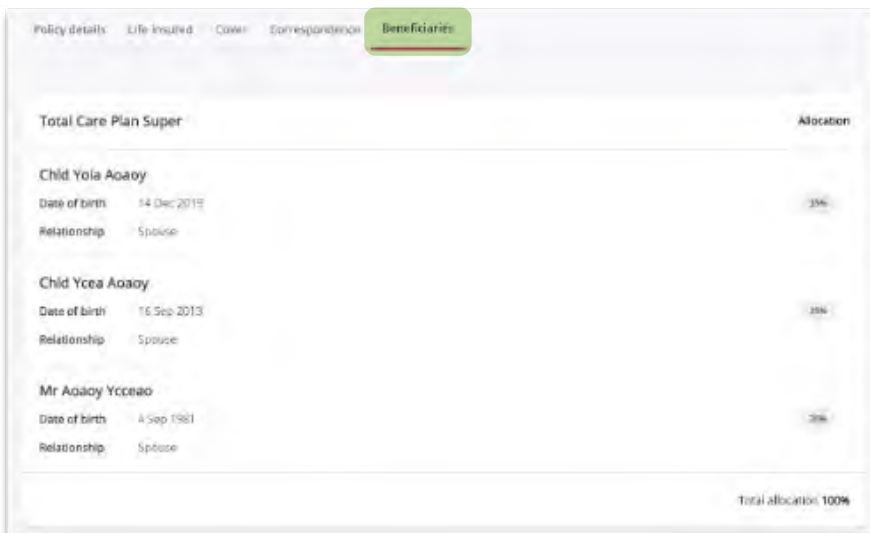
- Policy benefits
- Sum Insured
- Commencement date
- Premium structure
- Special terms (if relevant)

You can view each benefit type by clicking on the ^/v within the benefit tiles.



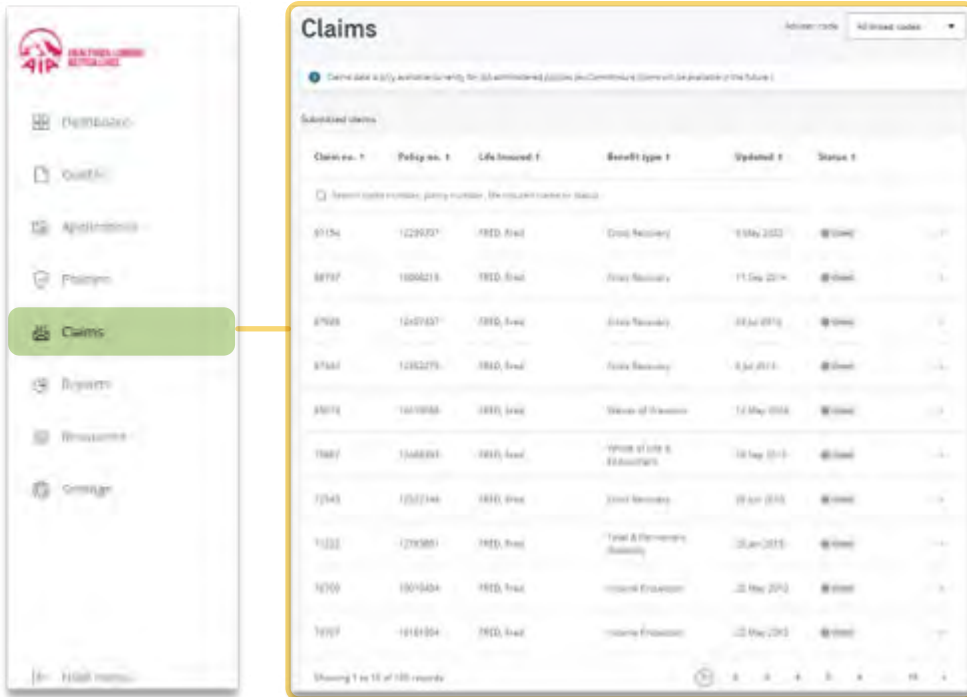
The **Correspondence** tab will display a list of historical correspondences. This includes correspondences such as anniversary letters, cover letters and policy schedules, re-rate/ rate rise letters etc.

Some correspondences such as renewal letters will only be available for a period of time.



The **Beneficiaries** tab will show the benefactors and the % allocation for each, as well as the details of the benefactors as per nomination of beneficiary.

7. Claims



From the side menu, you can view Claims information for AIA policies only. Ex-CommInsure claims will be available in the future.

Claims:

The claims dashboard will display the following information:

- Claim no.
- Policy no.
- Life Insured
- Benefit type
- Updated
- Status based on the following options:

- ✔ Accepted
- ⓧ Closed
- i Under Assessment

Select the claim to view further information.

7.1 Claims detail

Once a claim is selected, you will be able to view the following information, as illustrated below:

Claim 97154

FRED, Fred

Closed

Claim Requirements Payments

Claim Detail:

Life Insured name: FRED, Fred

Policy number: 1229907

Date of birth: Jun 1968

Gender: FEMALE

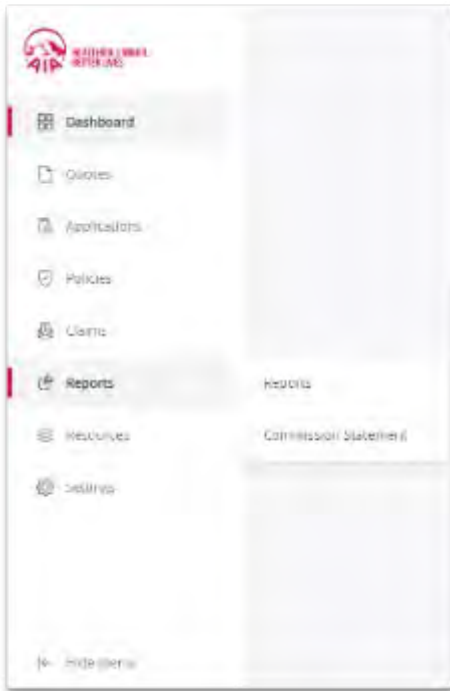
1 Claim status

2 Claim details

3 Requirements

4 Payments

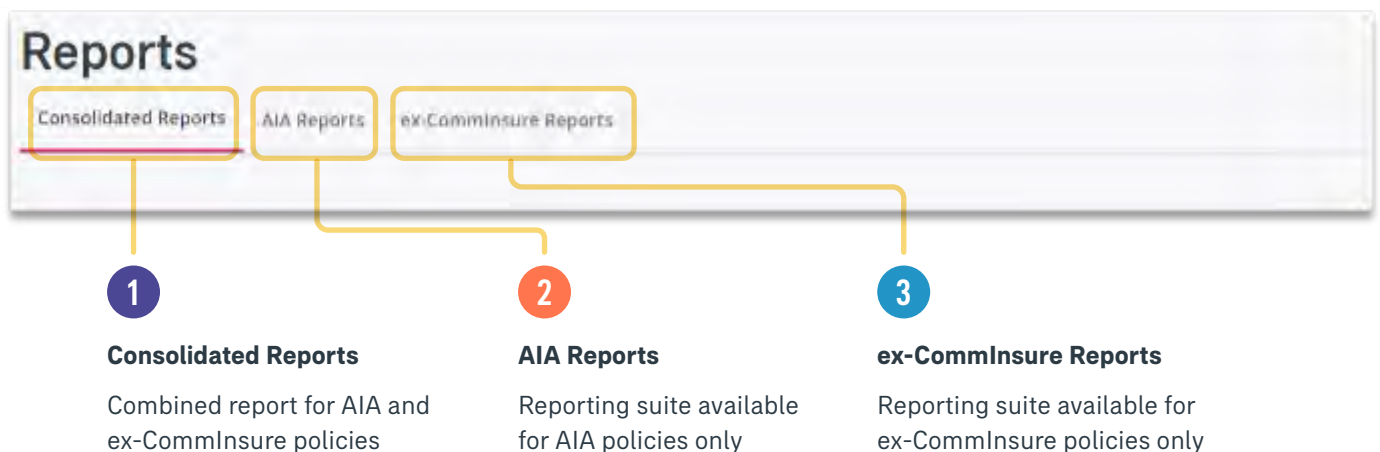
8. Reports



From the side menu, you can access your Reports and Commission Statement.

8.1 Reports: Consolidated Reports, AIA Reports, ex-CommInsure Reports

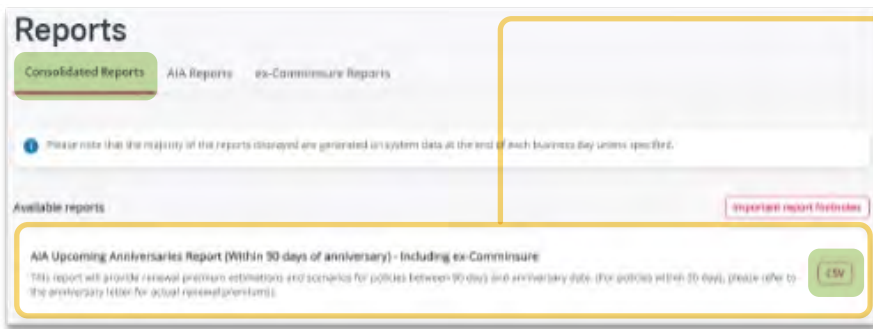
The reports page is split into 3 reporting categories as illustrated below:



WATCH THIS SPACE: AIA reports and ex-CommInsure reports will soon be available as a combined report under Consolidated Reports.

8.1.1 Consolidated Reports

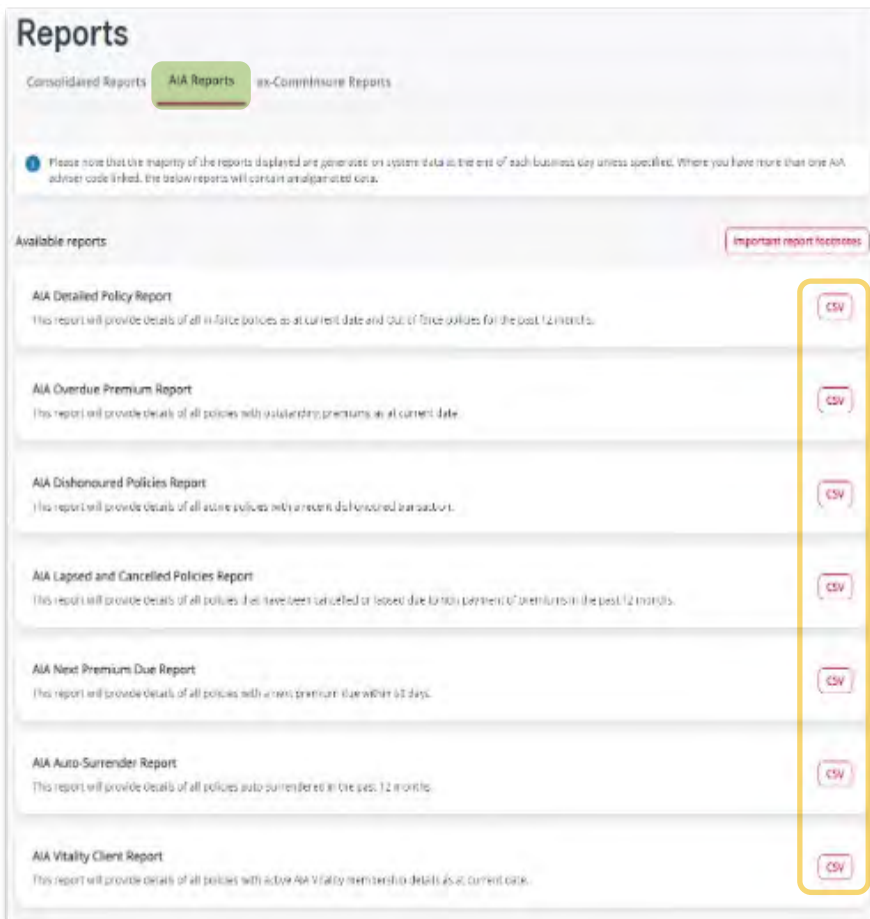
In the Consolidated Reports tab, there is currently one report that is available:



- 1 **AIA Upcoming Anniversaries Report (Within 90 days of anniversary) – including ex-Commlnsure**

To view/download a report, click on the CSV button. The file will download and be available in your Download folder on your device.

8.1.2 AIA Reports



In the AIA Reports tab, the following reports are available:

- 1 **AIA Detailed Policy Report**
- 2 **AIA Overdue Premium Report**
- 3 **AIA Dishonoured Policies Report**
- 4 **AIA Lapsed and Cancelled Policies Report**
- 5 **AIA Next Premium Due Report**
- 6 **AIA Auto Surrender Report**
- 7 **AIA Vitality Client Report**

8.1.3 ex-Commlnsure Reports



In the ex-Commlnsure Reports tab, the following reports are available:

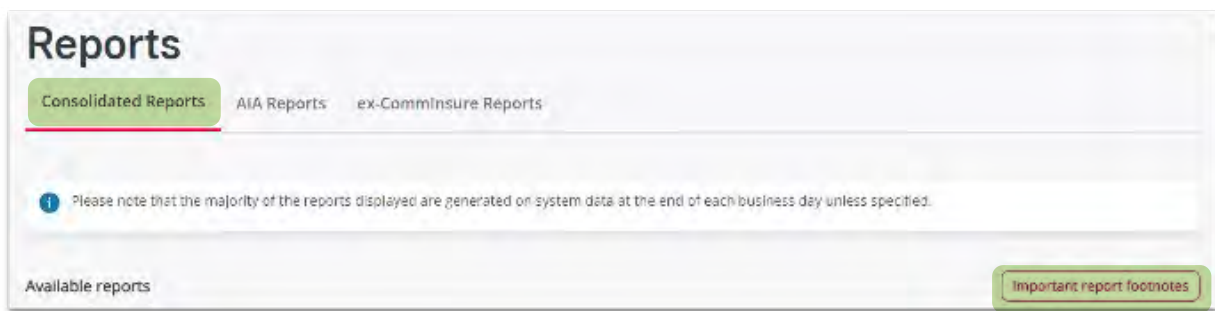
- 1 **ex-Commlnsure policies with non-payment**
- 2 **ex-Commlnsure In-Force Portfolio**

To view/download a report, click on the CSV button. The file will download and be available in your Download folder on your device.

You can download multiple reports at the same time.

8.1.4 Important report footnotes

At the top of each reporting section, there is a button to view important report footnotes. This section provides an overview of the reports available, how some fields are calculated, the time/duration of the report criteria and other important information.



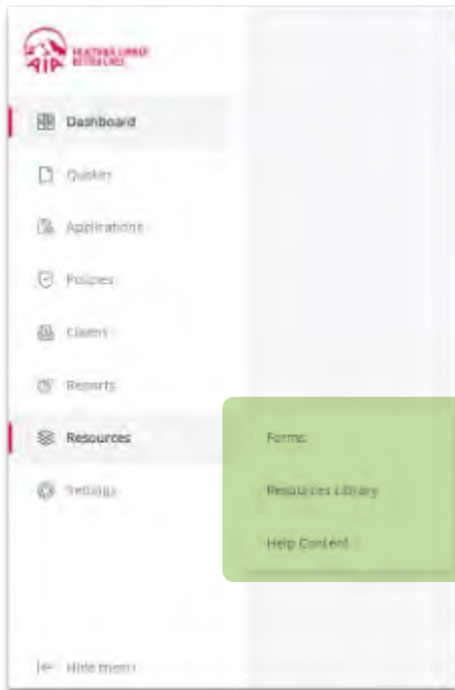
8.1.5 Commission Statements

Commission statements are downloadable based on an individual adviser code only. To select the adviser code to generate the commission statement, select the relevant code from the top right-hand corner of the screen. Commission statements will only be stored on the adviser portal for 6 months, anything older than 6 months will require the Adviser Remuneration Team to manually process and send to the requester, see message banner below.

The Commission Statement/s available for download will be displayed in the list below, these are available to download as a ODF or XLS file.

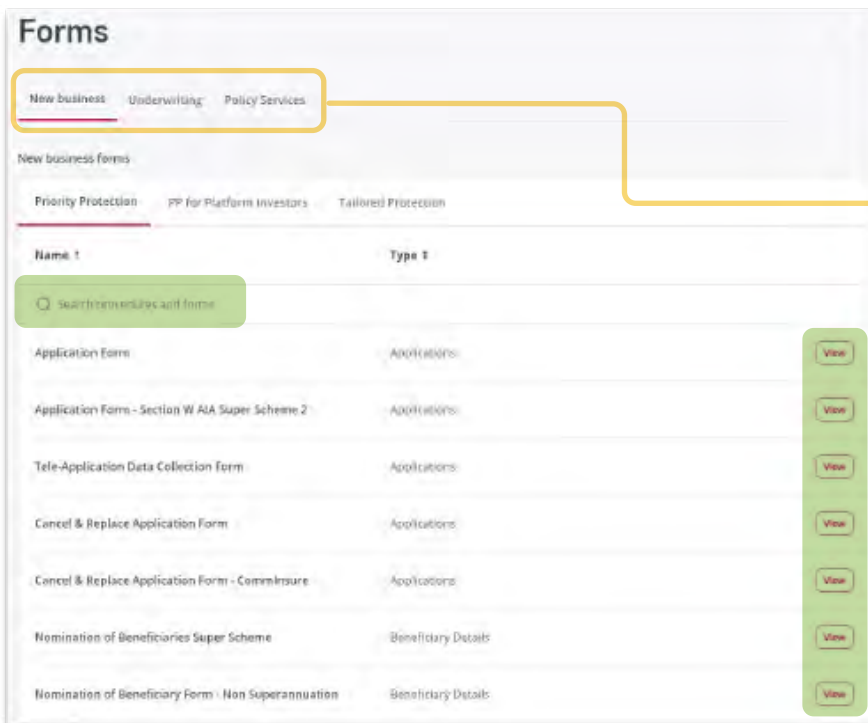


9. Resources



From the side menu, you can access various resources such as forms, resource library and help content.

9.1 Forms



All forms available will be listed here and separated into the following sections:

- 1 **New Business**
- 2 **Underwriting**
- 3 **Policy Services**

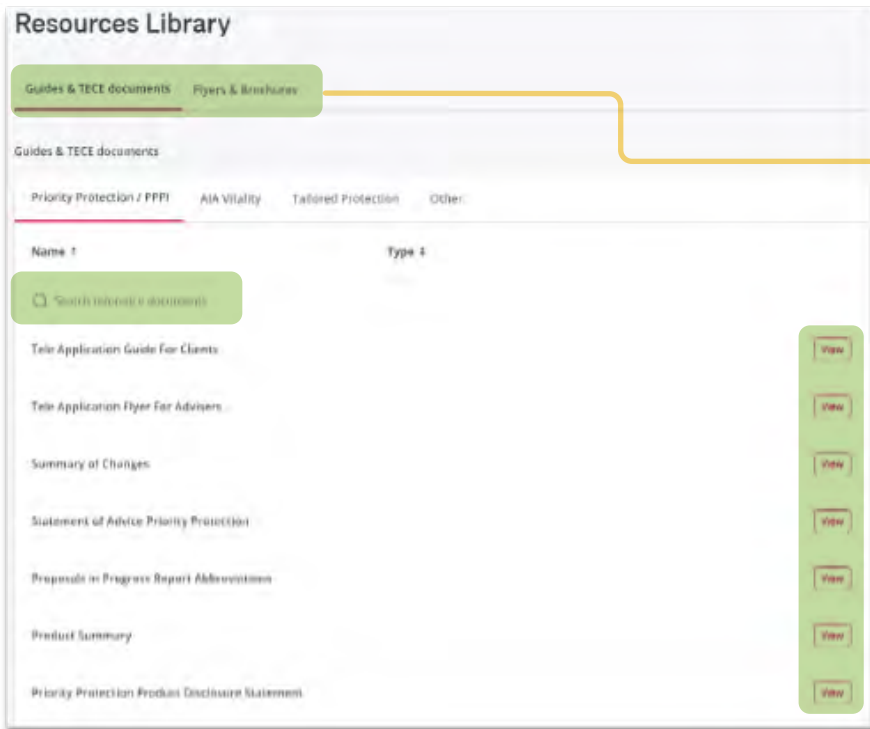
Within each section, you can view the forms available for Priority Protection (AIA), PP for Platform Investors and Tailored Protection (ex-CommInsure).

To view the form, click on the view button.



You can also search for a form by entering the name of the form in the search field.

9.2 Resources Library



The resources library is separated into 2 sections:

- 1 **Guides & TECE documents**
- 2 **Flyers & Brochures**

Within each section, you can view the resources available for Priority Protection/ PPI (AIA), AIA Vitality, Tailored Protection (ex-CommInsure) or Other.

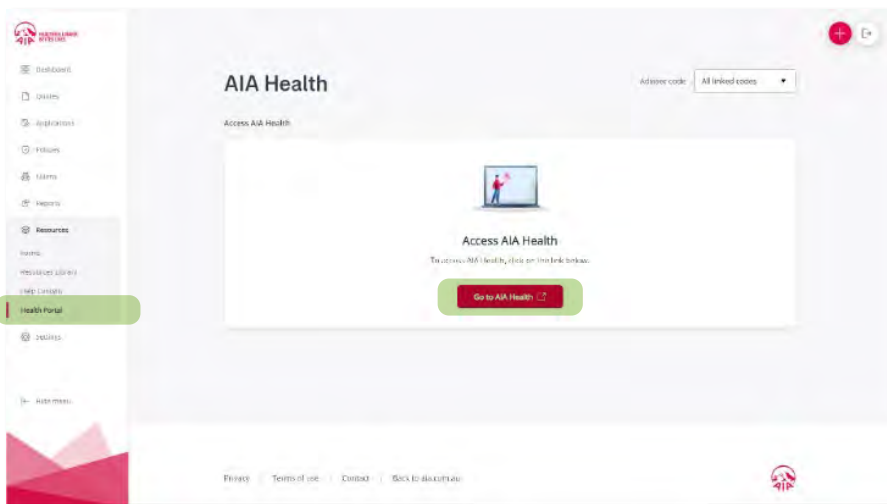
To view the form, click on the view button.



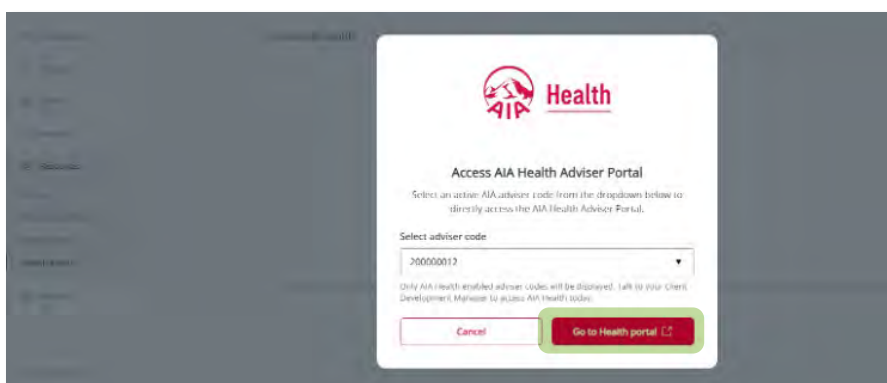
You can also search for a form by entering the name of the form in the search field.

9.3 Adviser Health Portal

You can access the link to the Adviser Health Portal from the resources section.

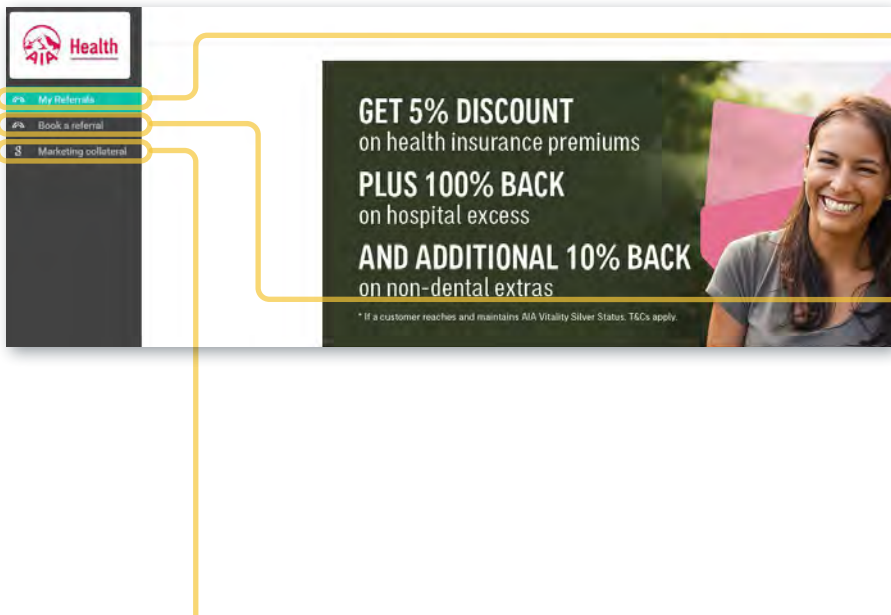


Select your adviser code and click the 'Go to Health Portal' button.



You will be taken to the Home page of the Adviser Health Portal.

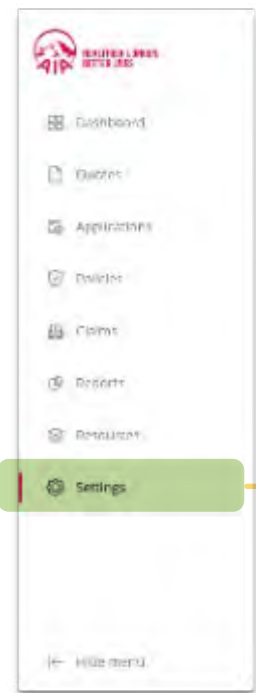
The Adviser Health Portal provides you with a seamless referral process, with greater transparency on customer outcomes. It's designed to help you actively manage your referrals and easily access information without entering your credentials each time, through the below sections of the site:



The screenshot shows the home page of the Adviser Health Portal. On the left is a dark sidebar with a white 'Health' logo at the top. Below the logo are three menu items: '1 My Referrals', '2 Book a referral', and '3 Marketing collateral'. The main content area features a large promotional banner with a smiling woman's face on the right. The banner text reads: 'GET 5% DISCOUNT on health insurance premiums', 'PLUS 100% BACK on hospital excess', and 'AND ADDITIONAL 10% BACK on non-dental extras'. Below the banner is a small asterisked note: '* If a customer reaches and maintains AIA Vitality Silver Status. T&Cs apply.' Three yellow callout lines originate from the sidebar and point to the corresponding numbered sections on the right.

- 1 My Referrals**
Find and download your client's details, see the progress of their referral, and the estimated referral fee. It can take up to 15 minutes to refresh, so please allow time after submitting a referral.
- 2 Book a Referral**
Book your clients a Private Health Review by selecting their time zone, preferred date and time, entering their details and following the prompts. Confirmation of booking and reference number will be provided. You can also reschedule or cancel existing appointments.
- 3 Marketing Collateral**
Marketing Collateral - Find up-to-date promotional material and campaign information.

10. Settings



The screenshot shows the 'Settings' page in the Adviser Health Portal. On the left is a white sidebar with a red 'AIA' logo at the top. Below the logo are several menu items: 'Dashboard', 'Dates', 'Applications', 'Divides', 'Claims', 'Reports', 'Resources', and 'Settings'. The 'Settings' item is highlighted with a green background. A yellow callout line connects the 'Settings' item to the main content area on the right.

From the side menu you can access the settings. In here, you will be able manage:

- 1 Profile**
- 2 User Management (delegate)**
- 3 Adviser Codes**
- 4 Datafeed**
- 5 Email Preferences**

The main content area shows the 'Settings' page with a white background and a yellow border. At the top is the word 'Settings' in a large, bold font. Below it are five tabs: 'Profile', 'User Management', 'Adviser Codes', 'Datafeed', and 'Email Preferences'. The 'Profile' tab is currently selected and highlighted with a red underline.

10.1 Profile

Settings

Profile | User Management | Adviser Codes | Datafeed | Email Preferences

Contact details

Bill Gates

User name: aia20000012@getria.com [edit]

Mobile phone number: 011555285 [edit]

Business phone number: 019881111 [edit]

Preferred email address for correspondence

Email address: aia20000012@getria.com [edit]

Adviser details

ASIC Authorized Representative number: 679355627 [edit]

Addresses

Business address: 11111e ASHTONBLD NSW 2323 [edit]

Postal address: 11111e ASHTONBLD NSW 2323 [edit]

Security settings

Password [Change password]

In the profile settings, you will be able to edit the following information:

1 Contact details: Username, Mobile phone number Business phone number

2 Preferred email address for correspondence

3 Adviser details: ASIC Authorised Representative Number

4 Addresses: Business address, Postal address

5 Security settings: Password

10.2 User Management

In the user management setting, you will be able to add, view or remove a delegate user to your account.

Delegate users can view any or all policies under any or all of your adviser codes. You also have the option to provide access to Commission statements to the delegate user.

Settings

Profile | **User Management** | Adviser Codes | Datafeed | Email Preferences

Current users

Add delegate

Name ↑	Email ↑	Status ↓
Search users		
shreshtha srivastava	shreshtha.srivastava@aia.com	Expired
iqq4www	iqq4.com	Expired

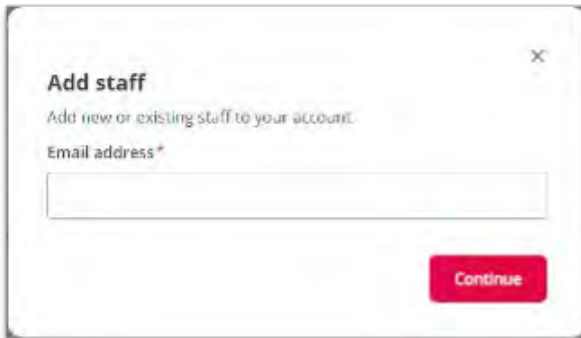
To add a delegate user, click on the **Add delegate** button.

To view the delegate user profile or unlink their access, click on the button on the right-hand side for that profile.

10.2.1 Add delegate

To add a new delegate to your account, click on the add delegate button.

1. Fill in the information as illustrated

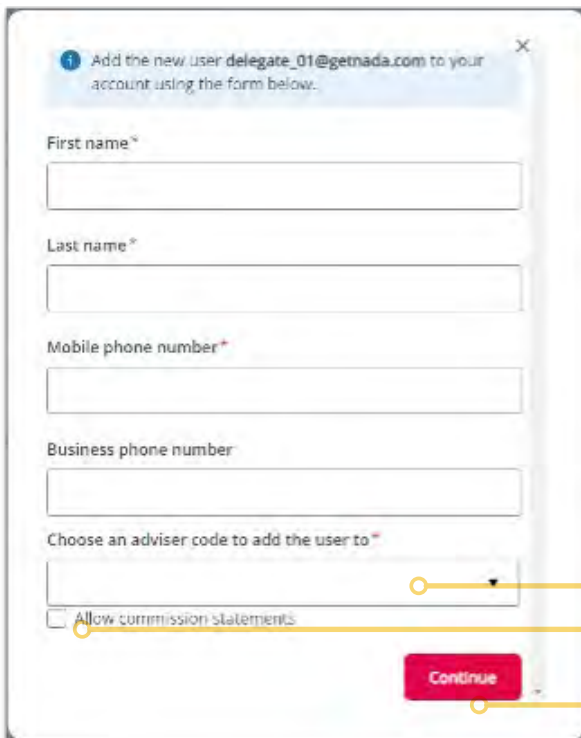


Add staff ✕

Add new or existing staff to your account.

Email address*

Continue



Add staff ✕

i Add the new user `delegate_01@getnada.com` to your account using the form below.

First name*

Last name*

Mobile phone number*

Business phone number

Choose an adviser code to add the user to*

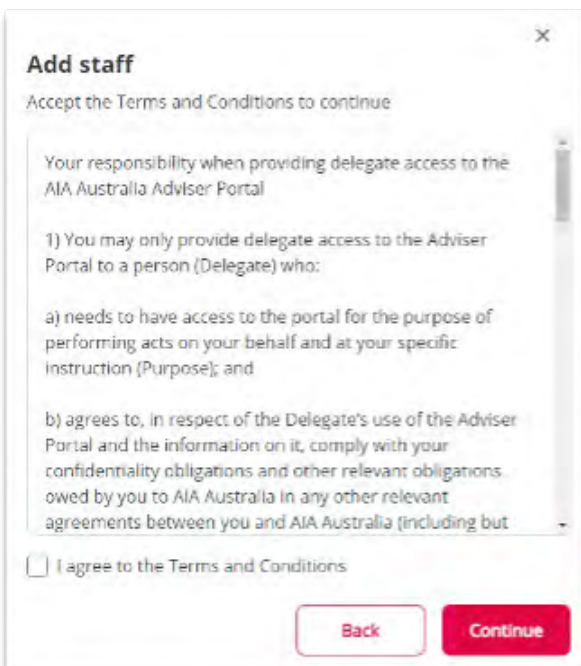
Allow commission statements

Continue

2. Select the **adviser code** from the drop-down menu

3. Click on the **Allow commission statements** checkbox if you want the delegate user to have access to this.

4. Once you have filled in the form, click continue



Add staff ✕

Accept the Terms and Conditions to continue

Your responsibility when providing delegate access to the AIA Australia Adviser Portal

1) You may only provide delegate access to the Adviser Portal to a person (Delegate) who:

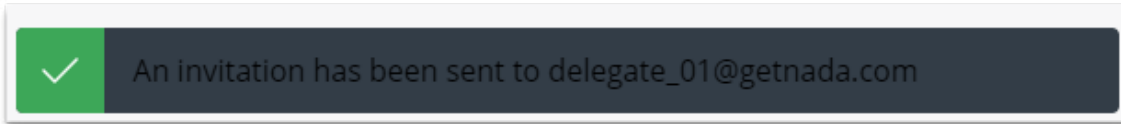
a) needs to have access to the portal for the purpose of performing acts on your behalf and at your specific instruction (Purpose); and

b) agrees to, in respect of the Delegate's use of the Adviser Portal and the information on it, comply with your confidentiality obligations and other relevant obligations owed by you to AIA Australia in any other relevant agreements between you and AIA Australia (including but

I agree to the Terms and Conditions

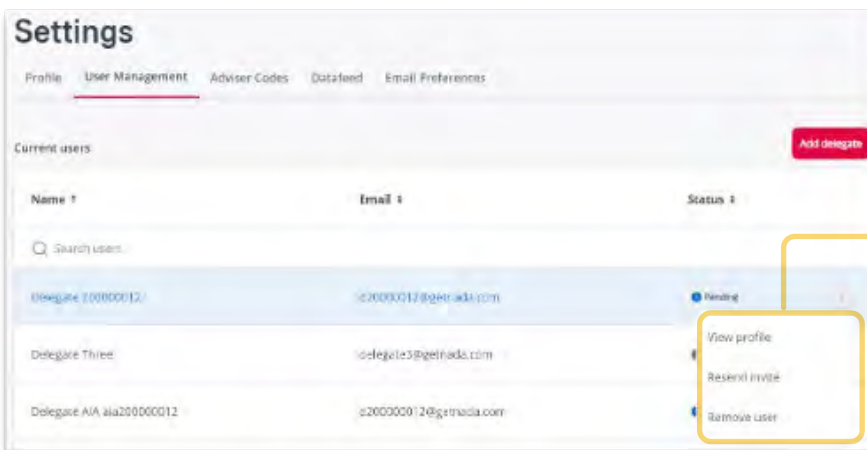
Back **Continue**

You will then see the notification stating an invitation has been sent to the delegate:



Delegate users will need to activate their account via the email link sent.

10.2.2 View delegate user profile



To view the delegate user profile, click on the button on the right-hand side. You will be able to:

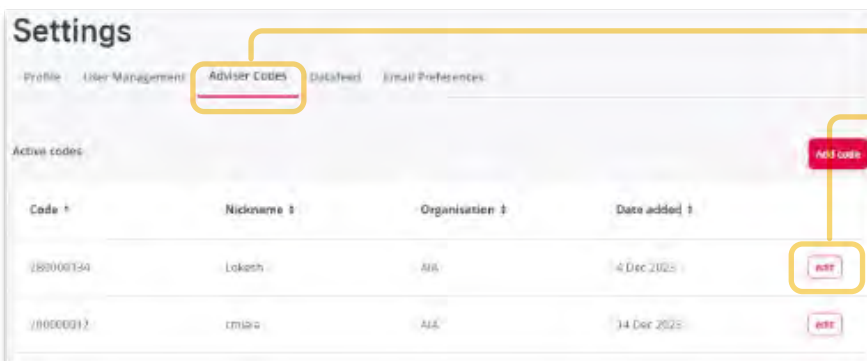
- 1 **View profile**
- 2 **Resend invite** (for newly added delegate users that have not activated their account)
- 3 **Remove user**



View delegate profile:

You can review/edit the permissions for the delegate user by viewing the profile and clicking on the **edit user** button.

10.3 Adviser codes



To view, edit or add adviser codes to your profile, click on the **Adviser Codes** tab.

Edit adviser code:

You will only be able to edit the “nickname” assigned to the adviser code via the **edit** button. No other information can be amended.

10.3.1 Add adviser code

To add an existing adviser code to your account, you will need the adviser code number and password used to sign into that account. Once you've entered the details, click on the **link code** button.

10.4 Datafeed

10.4.1 Activate datafeed

To activate the datafeed for any of the adviser codes, click on the **Datafeed** tab and select the adviser code that you want to activate.

Datafeed is ONLY available for AIA policies currently. Although ex-Commlnsure codes will display, these will only be available to register in future releases.

Select from the list of tools available, click on the declaration box and click submit to activate the datafeed.

10.4.2 Deactivate datafeed

To deactivate a datafeed for an adviser code, select the code and confirm deactivation.

The screenshot shows a table of datafeeds with columns for Adviser Code, Tool, and Status. A yellow box highlights the 'Deactivate feed' button for the first row. To the right, a confirmation dialog box is shown with the title 'Deactivate datafeed?' and the text: 'Are you sure you want to deactivate PLATFORMPLUS datafeed? This action will deregister you from the 200000012 code.' The dialog has two buttons: 'Yes, deactivate' and 'Cancel'.

Adviser Code	Tool	Status	Action
200000410 AA	XPLAN [REDACTED]	Active	Deactivate feed
200000134 AA	N/A	Unregistered	Activate feed
200000012 AA	PLATFORMPLUS [REDACTED]	Active	Deactivate feed

10.5 Email preferences

The screenshot shows the 'Settings' page with the 'Email Preferences' tab selected. A note states: 'While unsubscribed from marketing communications, you may receive standard emails containing information relating to regulatory or user-specific information.' Under 'Marketing email preferences', there are three sections:

- Adviser news:** Regular communications which exclude messages from within the business. These may include product, service, claims, AIA Vitality, AIA Health and regulatory communications. Status: Off.
- Health news:** Latest private health insurance news and offers from AIA Health with AIA Vitality. Status: Off.
- Did you know?:** Communications from the AIA Client Development team to support your business. These include product, underwriting, claims and service updates aimed at increasing your awareness of what AIA Australia offers you and your clients. These communications differ from regular 1-to-1 communications. Status: On.

To manage your email preferences for communications with AIA, click on the type of communication you want to receive. You can change these settings any time.

11. Further Support

For further information or technical support relating to the AIA Adviser Portal, please contact the following:

Email: adviserportalsupport@aia.com

Phone: 1800 271 031

Website: <https://www.aia.com.au/en/adviser/business-growth-hub/resource-library/your-new-adviser-site>

AIA Australia

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