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AIA ADVISER PORTAL
USER GUIDE

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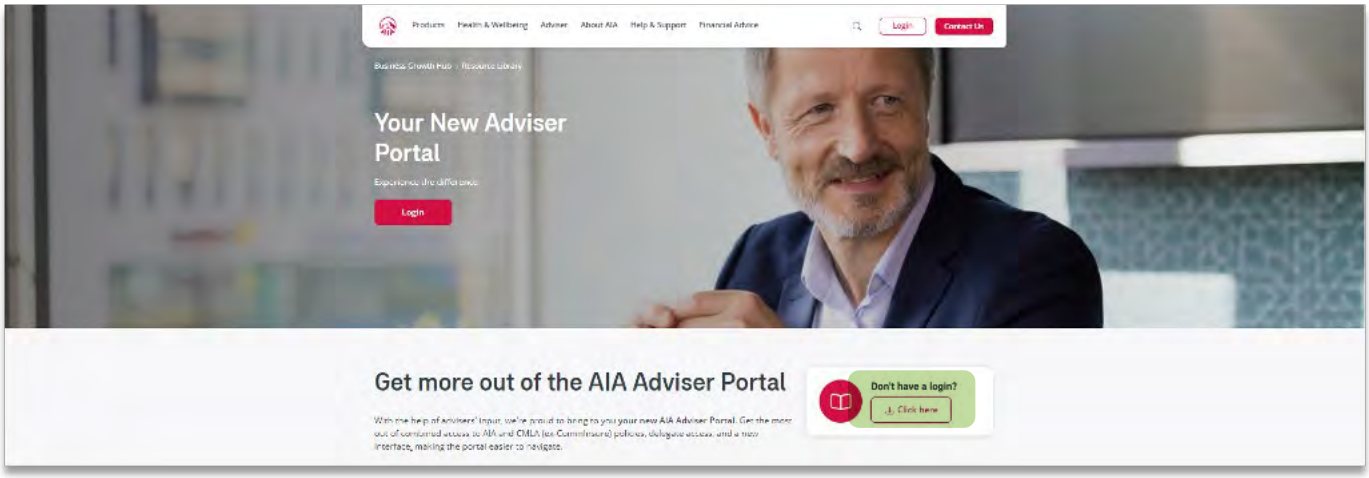
1. Getting started

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

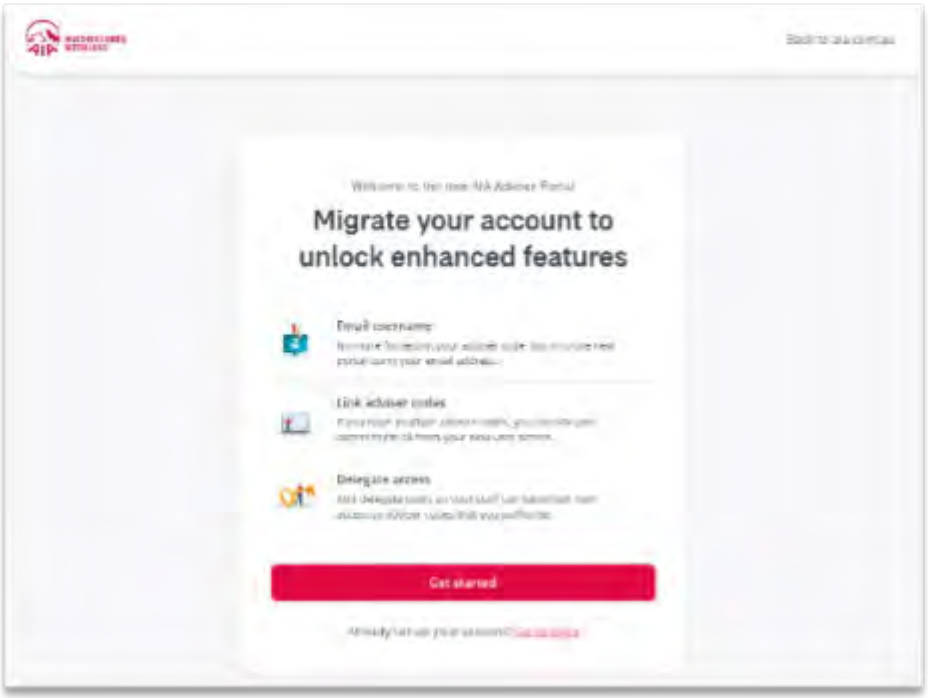
All active advisers and Licensees (via the nominated Responsible Individual user account) have access to the AIA Adviser Portal.

Using your AIA or ex-CommInsure 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.



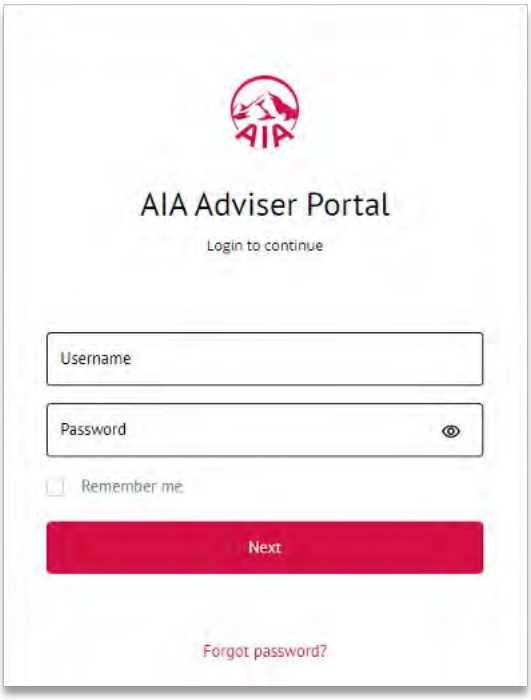
1.1 First time Logging in: Migration of existing adviser code access

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

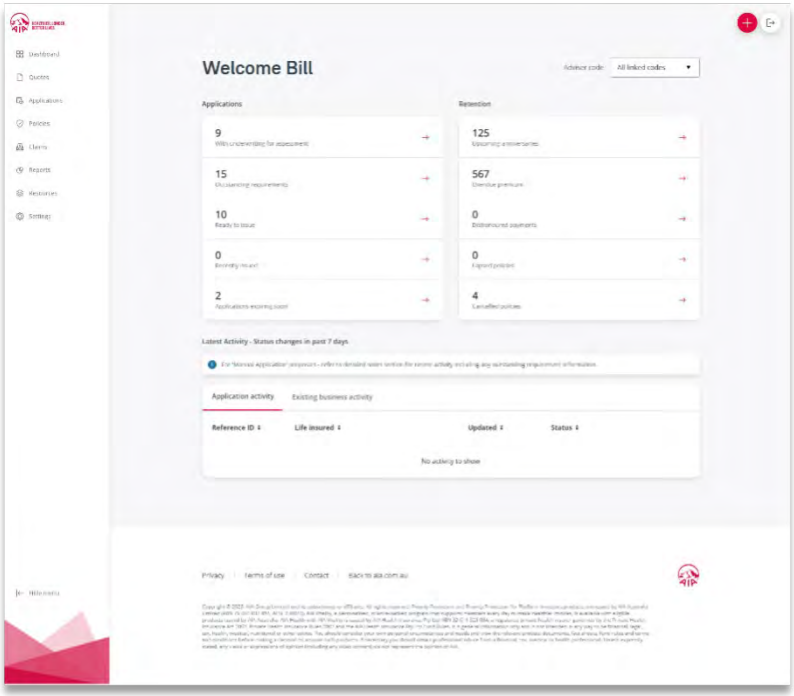


Once you have successfully migrated to the new AIA Adviser Portal, you can now log in via this link with your email address and password used to set up your access.

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.

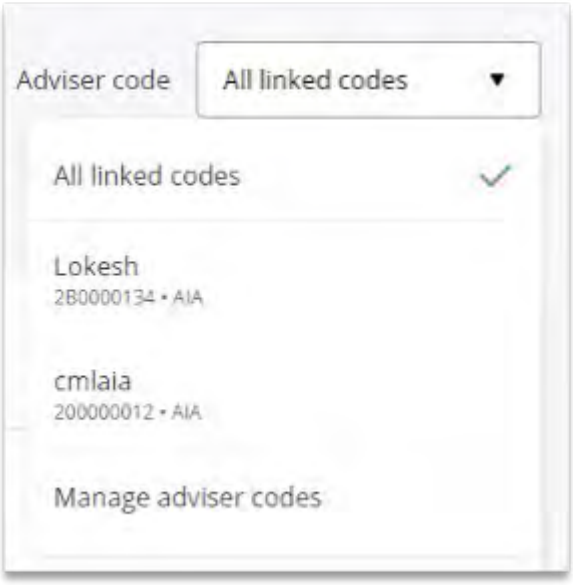
Logging into the new adviser portal is via your email address and password. You no longer need your adviser code to log in.

2. Dashboard



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

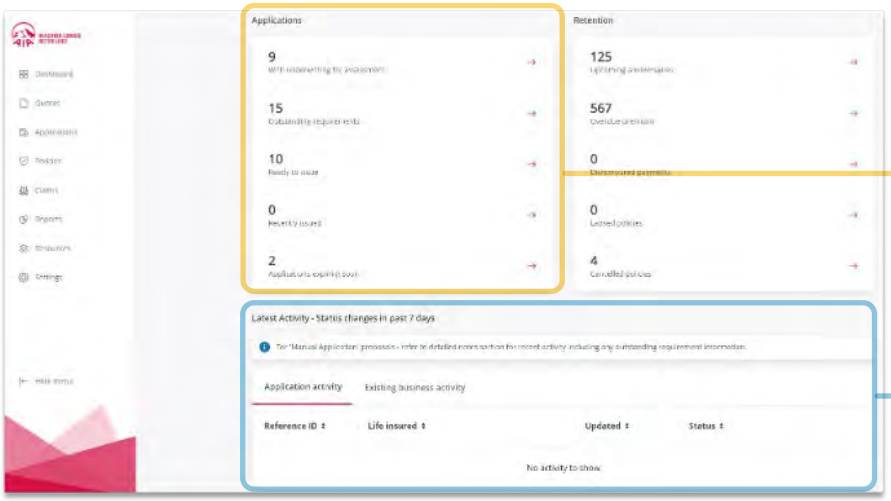


To switch to a specific adviser code, enabling the portal to display information specific to an adviser code, rather than a consolidated view, you can select the relevant adviser code via the drop-down box in the top right-hand corner of the page.

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

2.2 Applications Dashboard

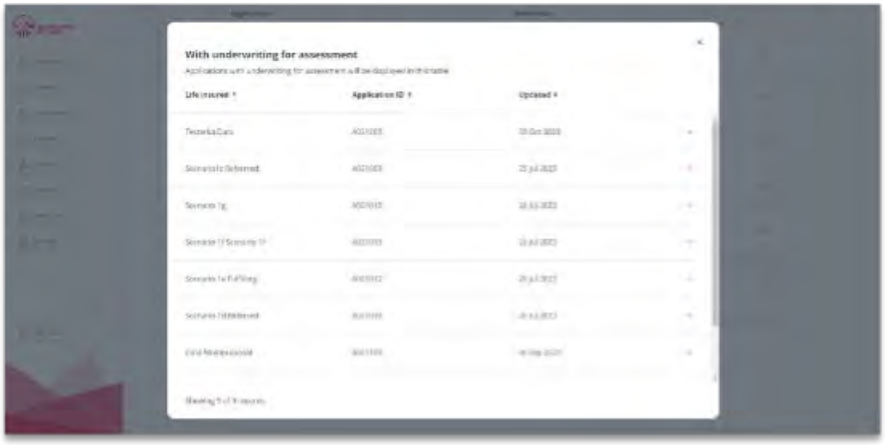
The applications dashboard has 5 tabs plus additional information displayed at the bottom of the dashboard showing applications with status changes in the last 7 days.



1. **With underwriting for assessment**
2. **Outstanding requirements**
3. **Ready to issue**
4. **Recently issued**
5. **Applications expiring soon**

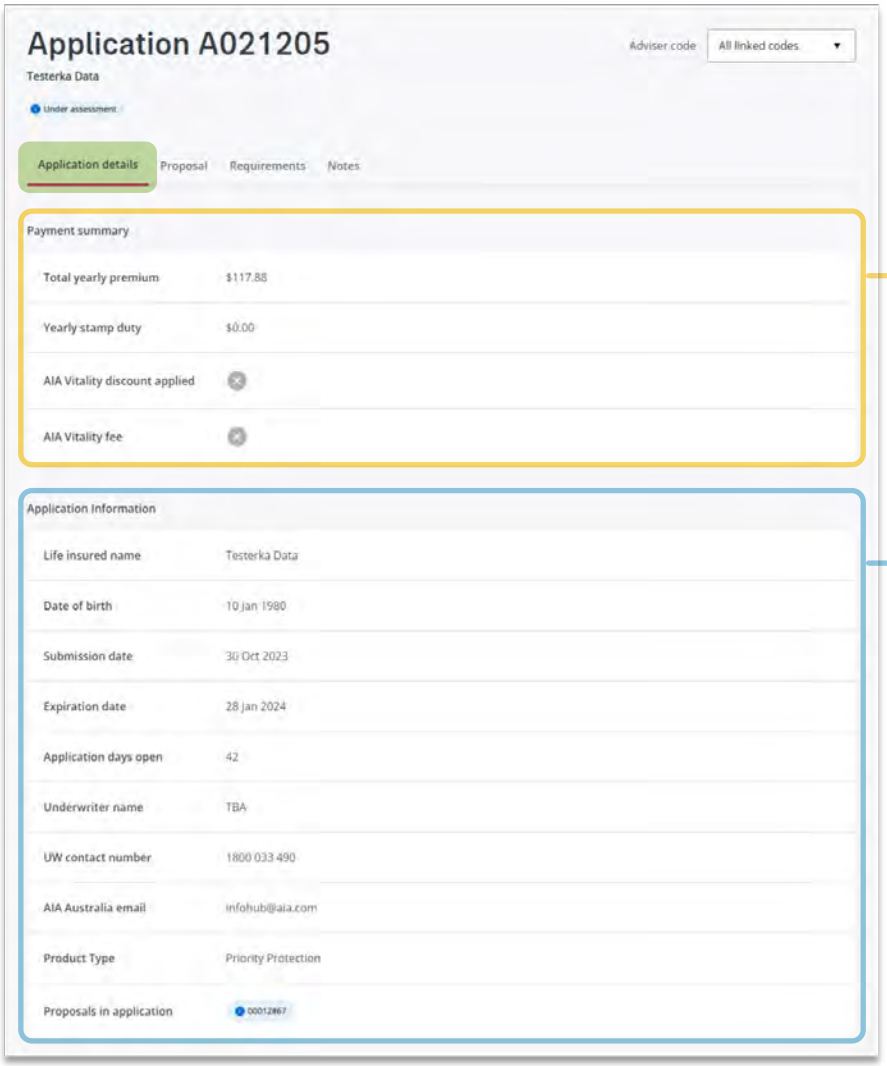
Click on the relevant tab or red arrow to show further information in each section.

2.2.1 With underwriting for assessment



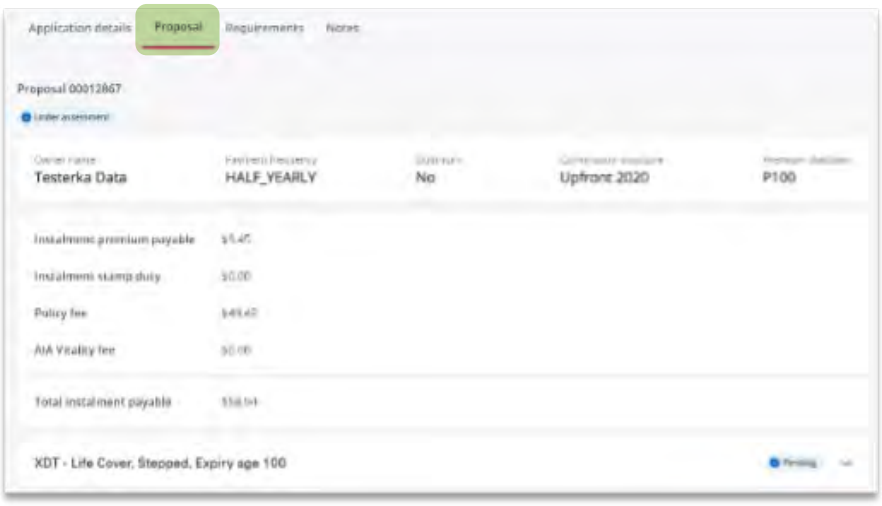
The dashboard shows the life insured name, application ID and last updated date.

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

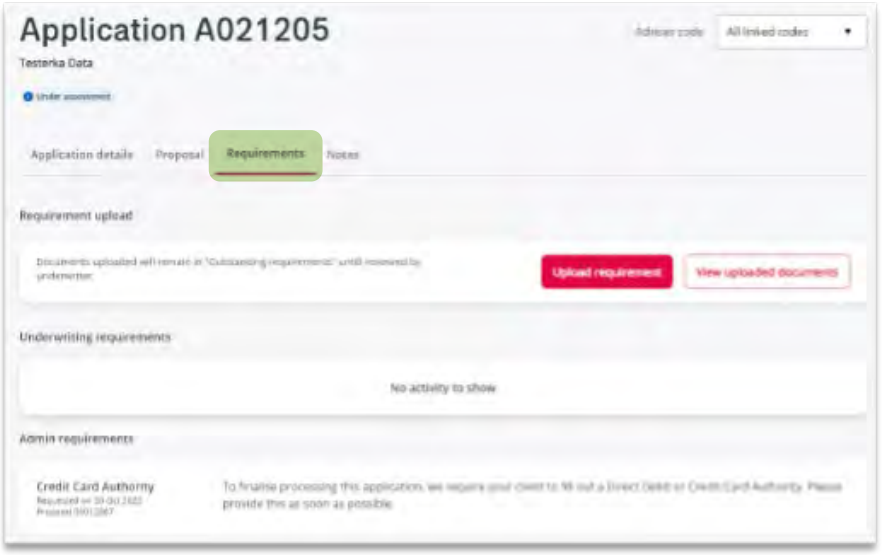


Payment Summary:
Shows premium summary, including Stamp Duty, Vitality discounts and Vitality fees if applicable.

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



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



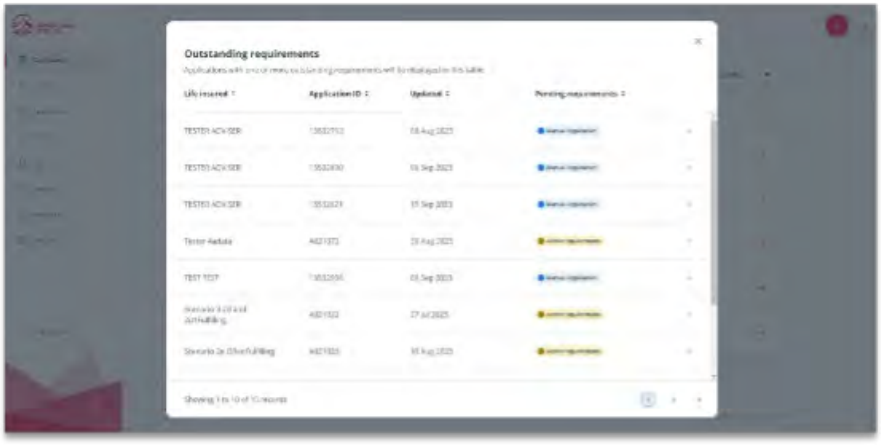
Requirements:
In here you will see any Underwriting or Admin Requirements.

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

Notes:

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

2.2.2 Outstanding requirements



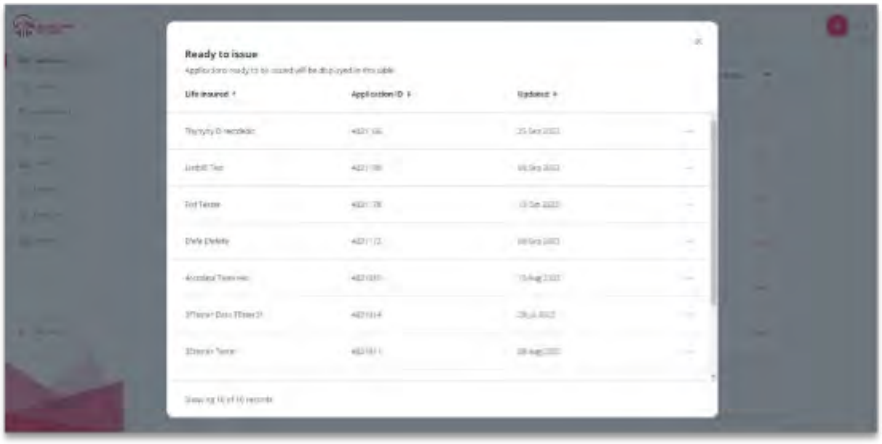
There are 3 main types of requirements:

- Admin requirements
- Underwriting requirements
- Underwriting & Admin requirements

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

- Manual Application

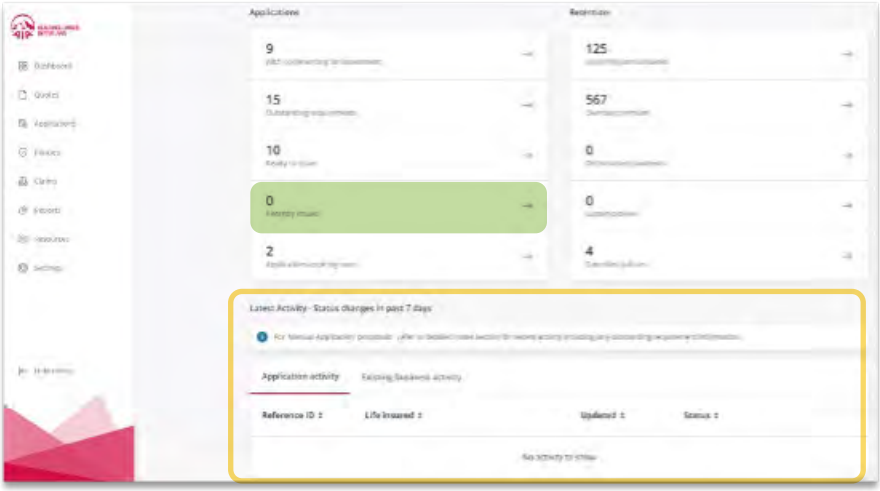
2.2.3 Ready to issue



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

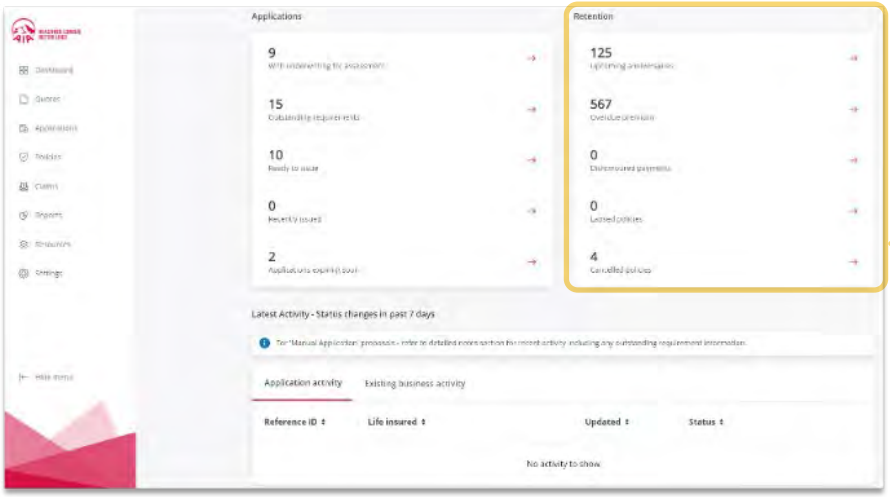


Recently issued:
Recently issued policies will sit in this dashboard for up to 7 days. It will also be displayed in the bottom section of the dashboard. After 7 days, it will be removed from the dashboard and will only be shown under the Policies menu (in-force).

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

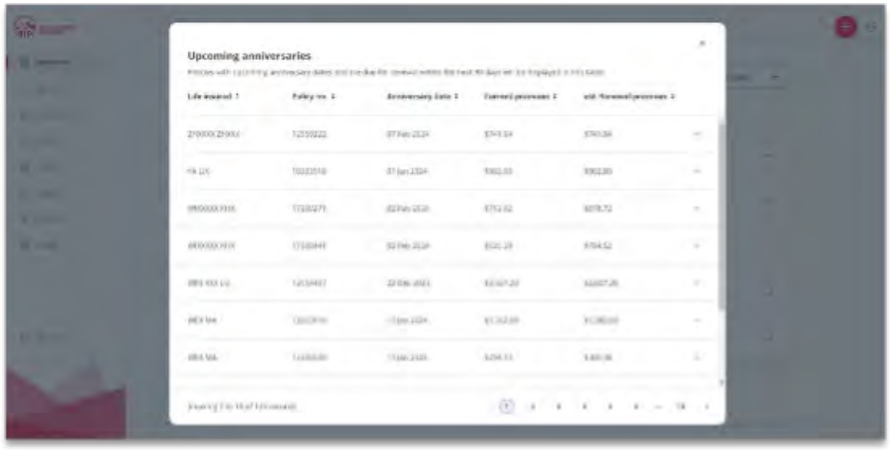


The retention dashboard has 5 tabs showing policies that meet the following criteria:

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.

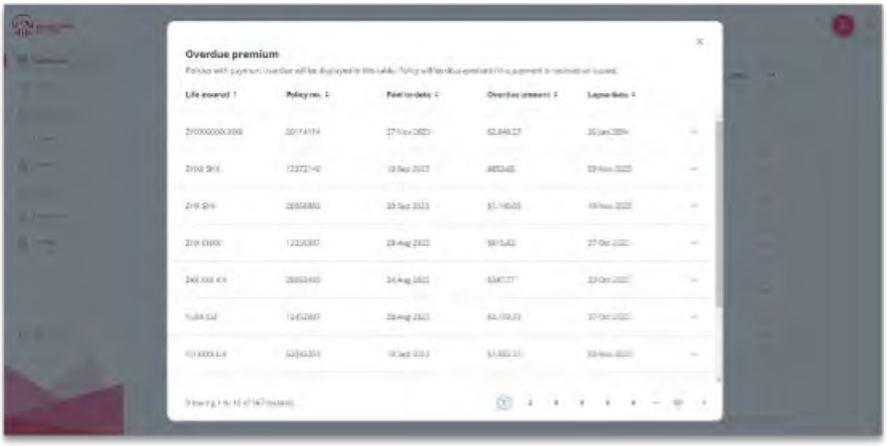
2.3.1 Upcoming anniversaries



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

2.3.4 Lapsed policies

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.

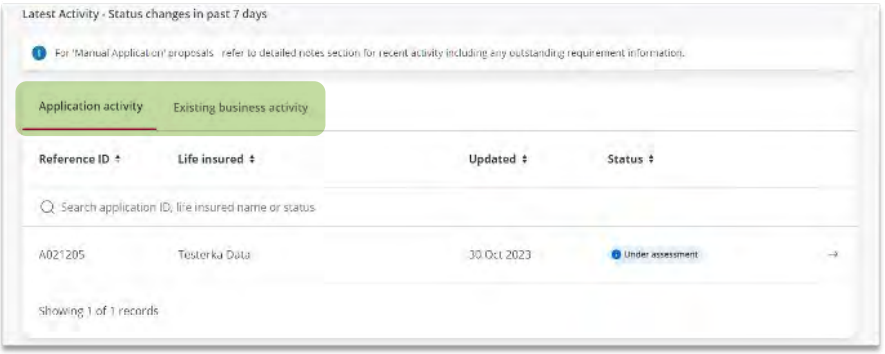
Once it exceeds the 90-day mark, you will no longer be able to view the details via the portal and will need to apply for reinstatement with a DOCGH or comply with any other reinstatement rule requirements.

2.3.5 Cancelled policies

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

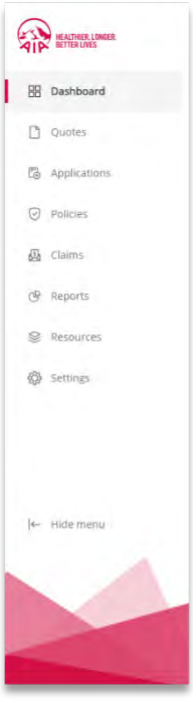
Cancellation rescindment rules will apply.

2.4 Latest Activity – Status changes in past 7 days



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-CommInsure policies.

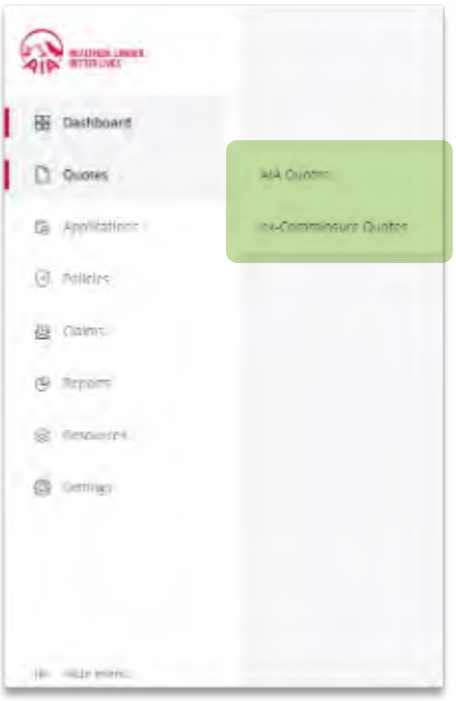
3. Side Menu



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-CommInsure 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-CommInsure 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.

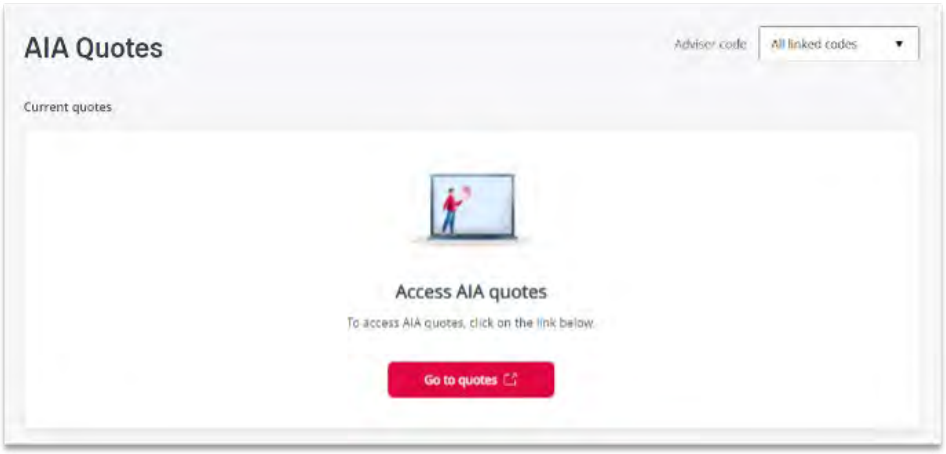
4. Quotes



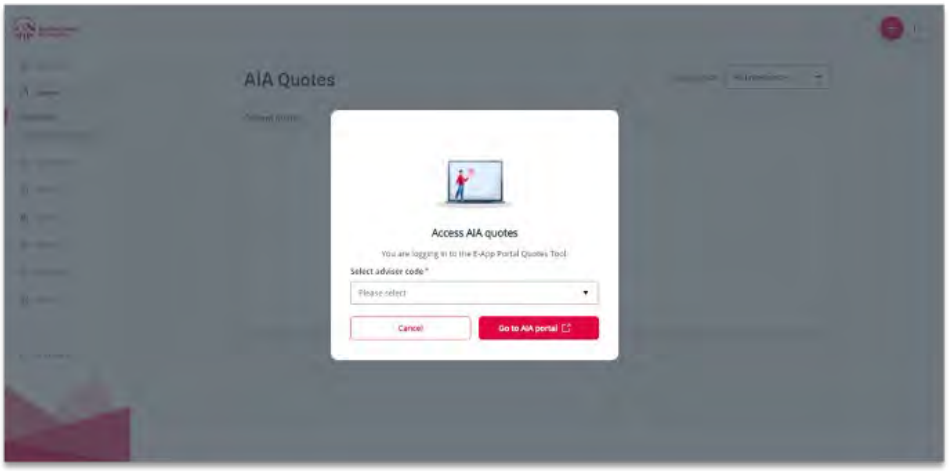
From the side menu, you can access the Quoting platforms for AIA or ex-Comminsure.

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

4.1 AIA Quotes

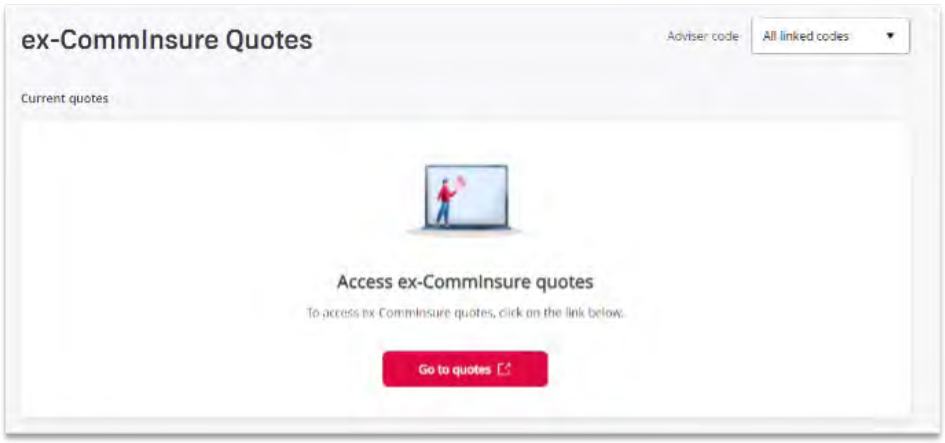


To access AIA quoting platform, select AIA Quotes. You will be required to select one of your AIA adviser codes (if you have multiple codes) to log into eApp portal via SSO as shown in the illustrations below.



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.

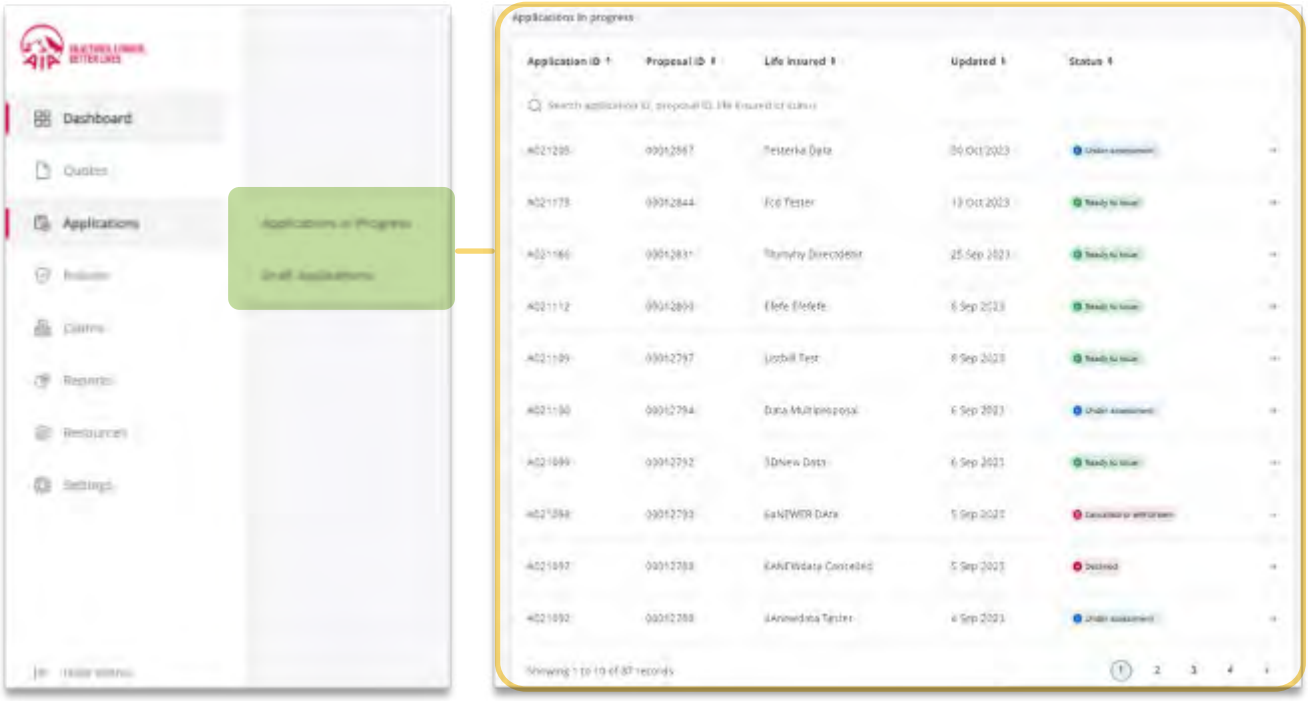
If you have more than one ex-CommInsure adviser code, you will need to select which code you want to access MyQuote.

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.

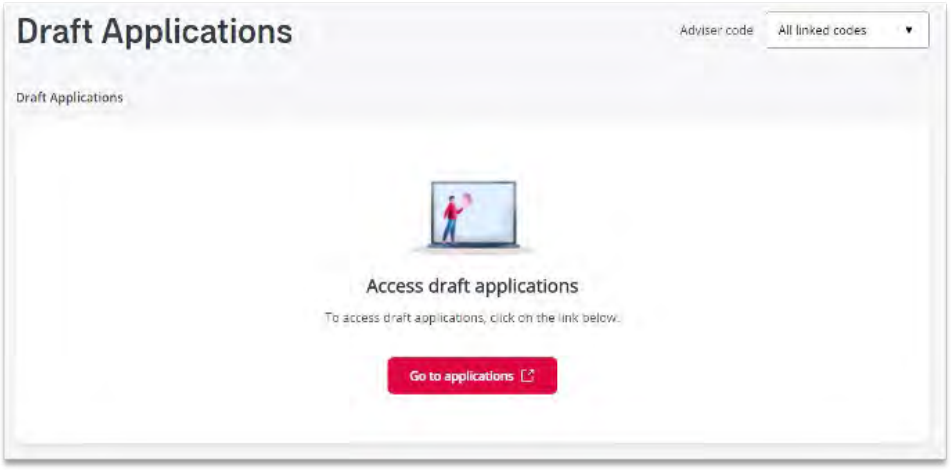
5.1 Applications in Progress

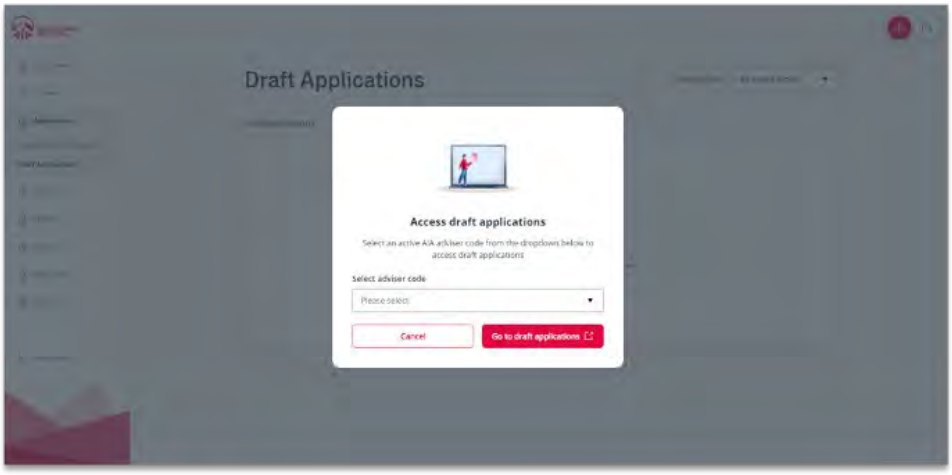
The information displayed in this section is similar to the information displayed in the Applications dashboard. This section provides a consolidated view of all applications in progress and their status.



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

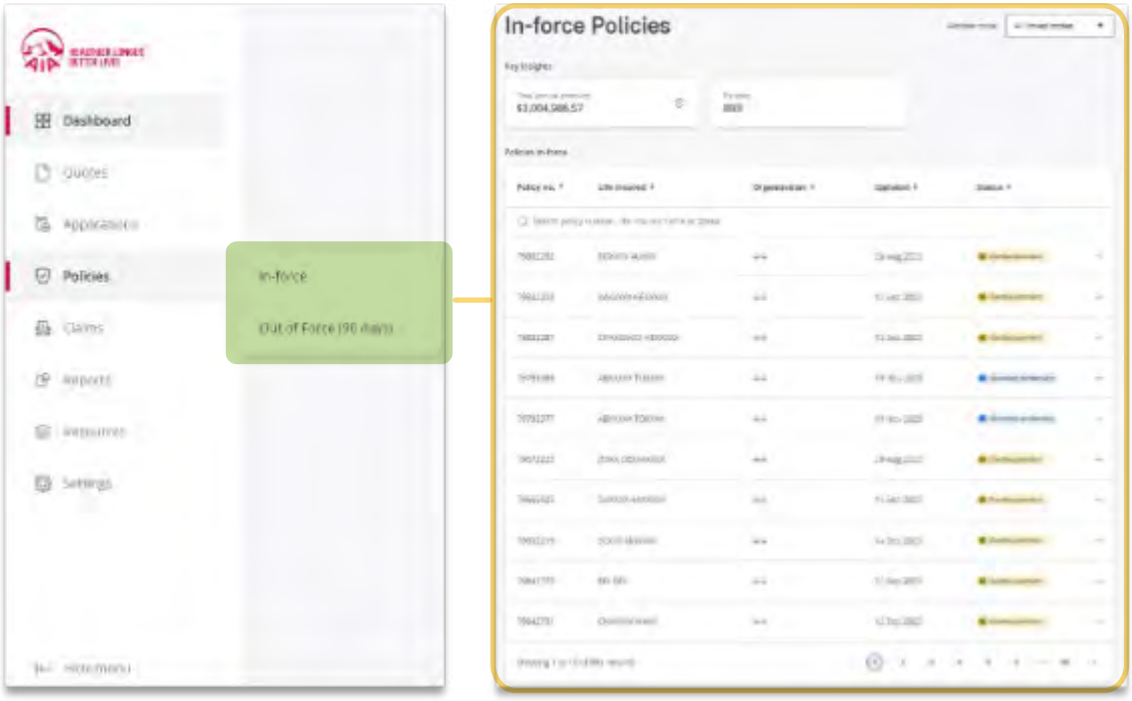




Click on the **Draft Applications** option to proceed to the AIA eApp portal via SSO. You will need to select the Adviser Code you want to access the draft applications.

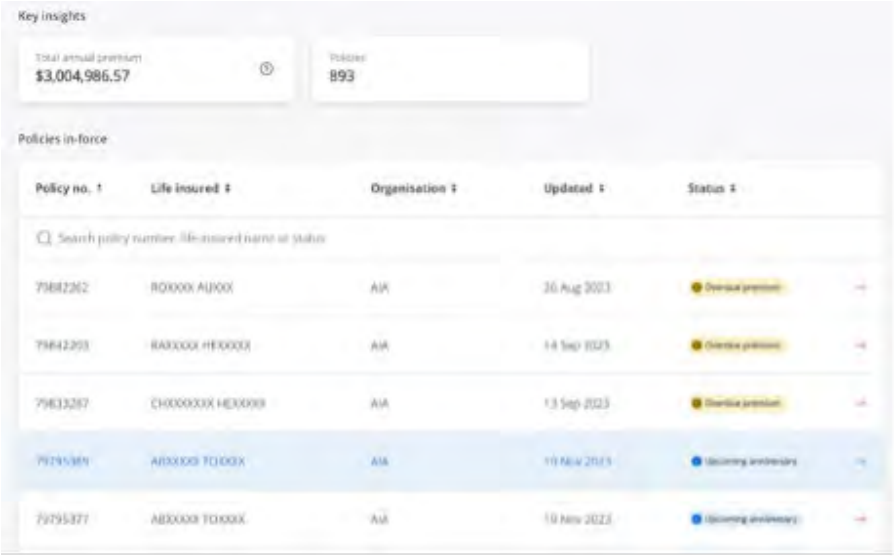
6. Policies

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.

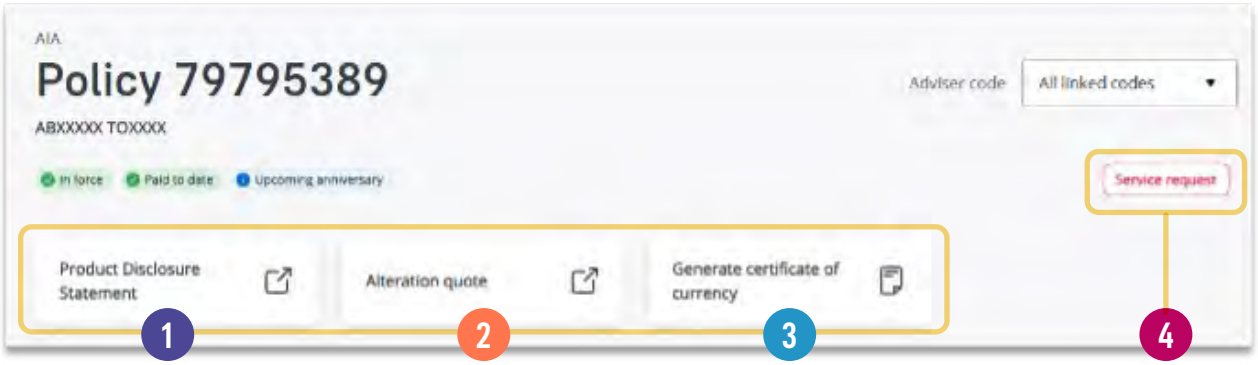
6.1 Detailed policy view



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

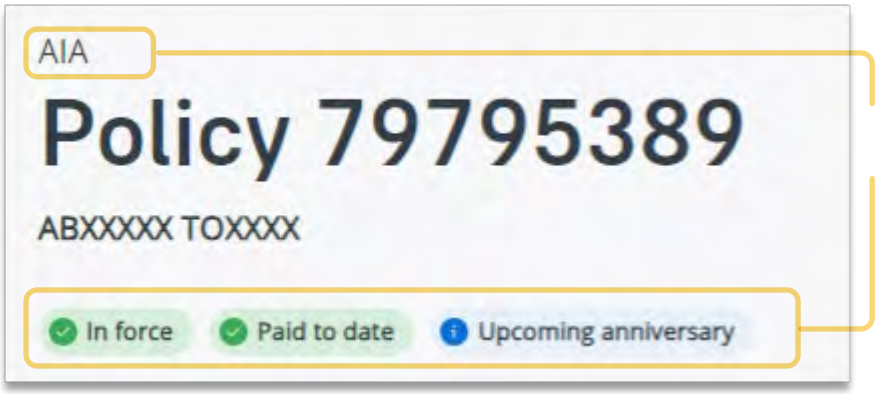
This tile will enable you to generate a COC for policies that are in-force (including policies where the premium is overdue).

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.

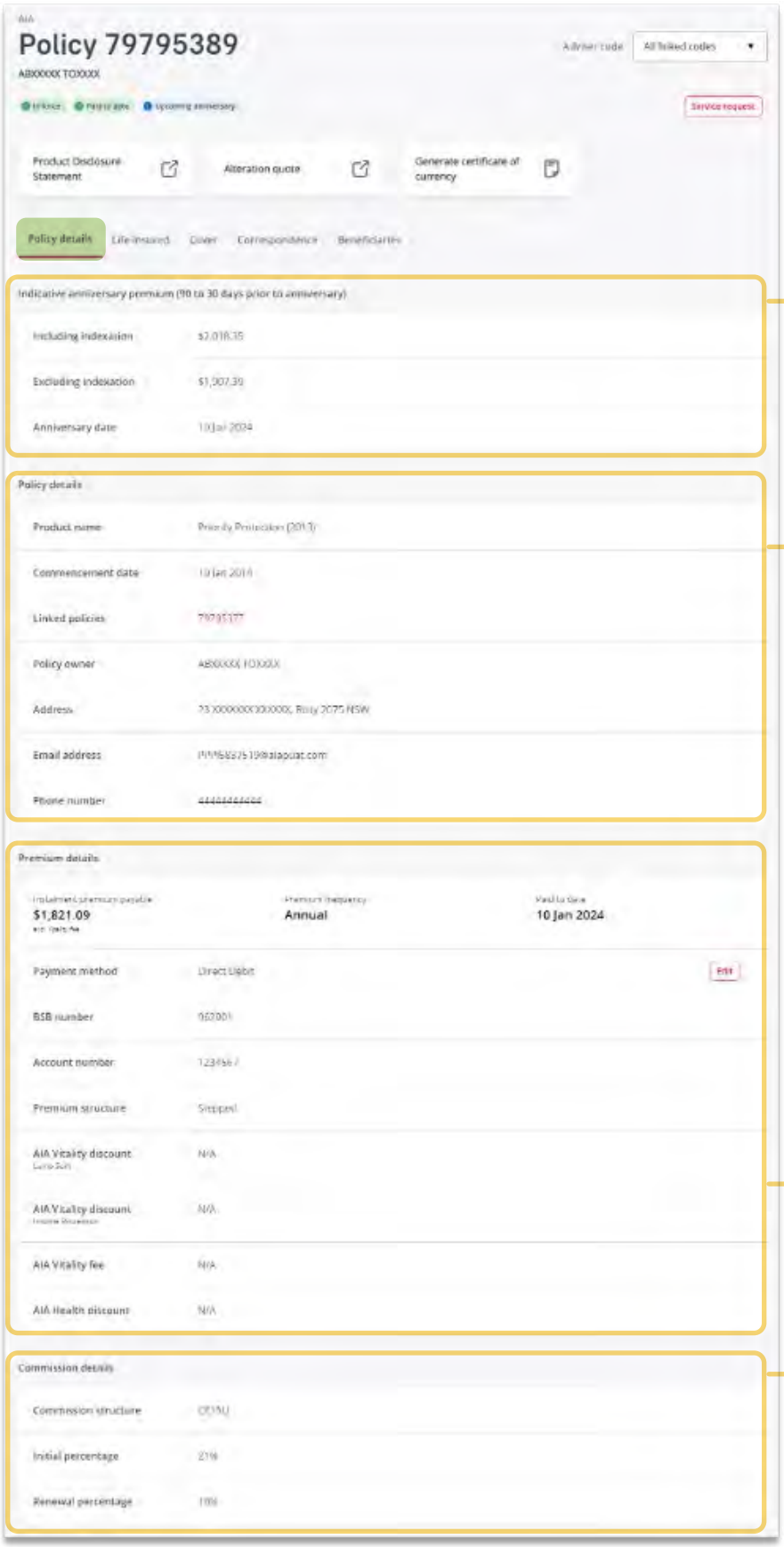
The Service request function is only available where a Financial Adviser Authority has been provided by the client. If no authority has been submitted, an error message will be displayed in Evolve.

6.1.2 Policy details



The policy details screen will display information such as:

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



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**

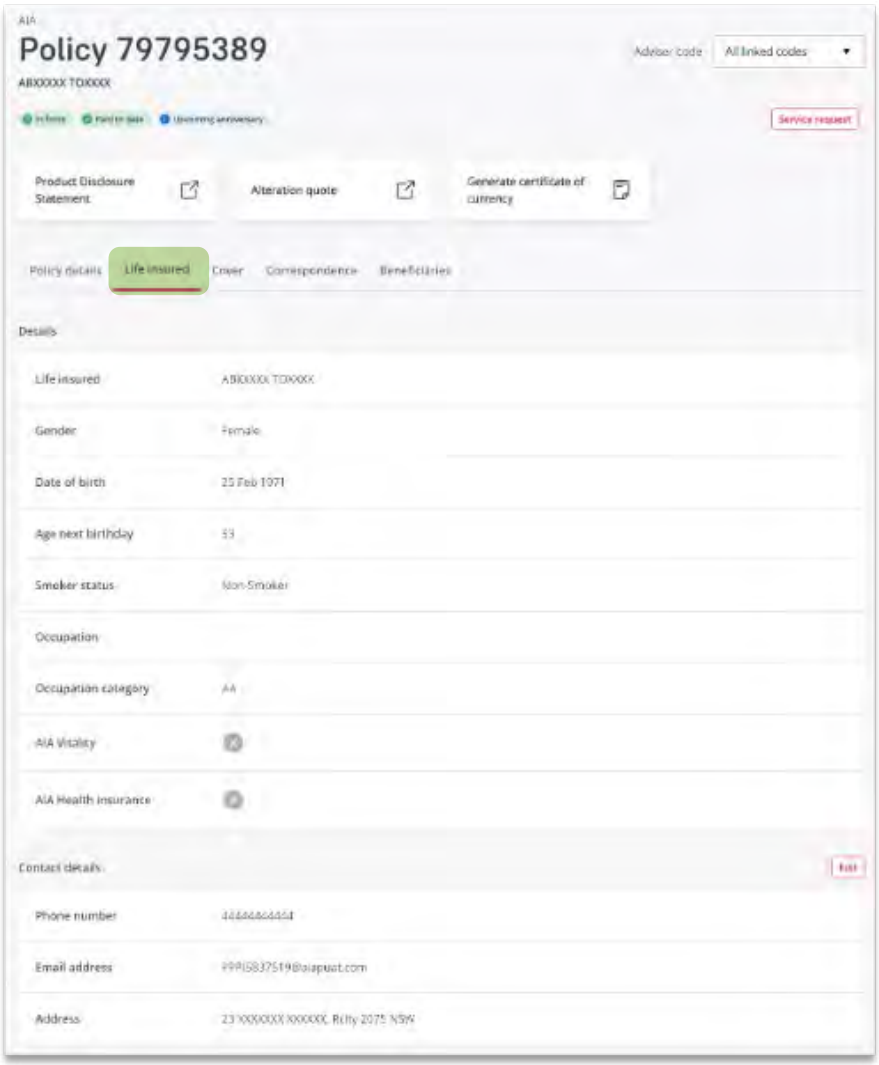
The policy details tab will display relevant information such as:

- 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....

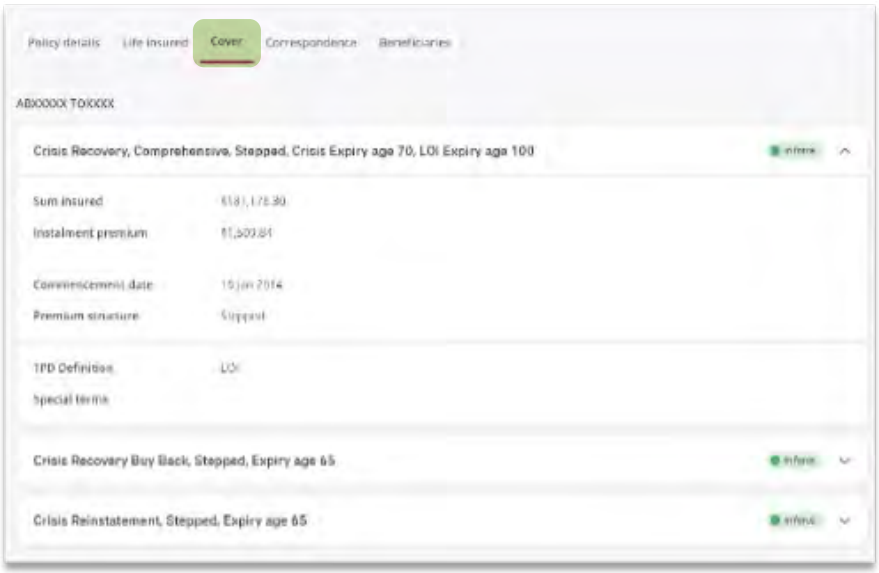
3 **Premium details**

4 **Commission details**



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

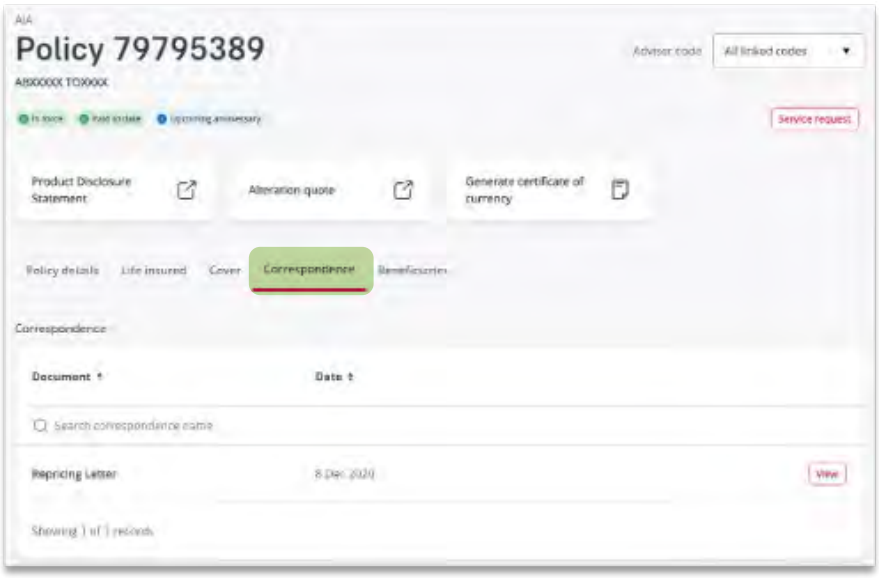
- DOB
- Smoker status
- Occupation and category
- Vitality and/or Health links
- Contact details



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

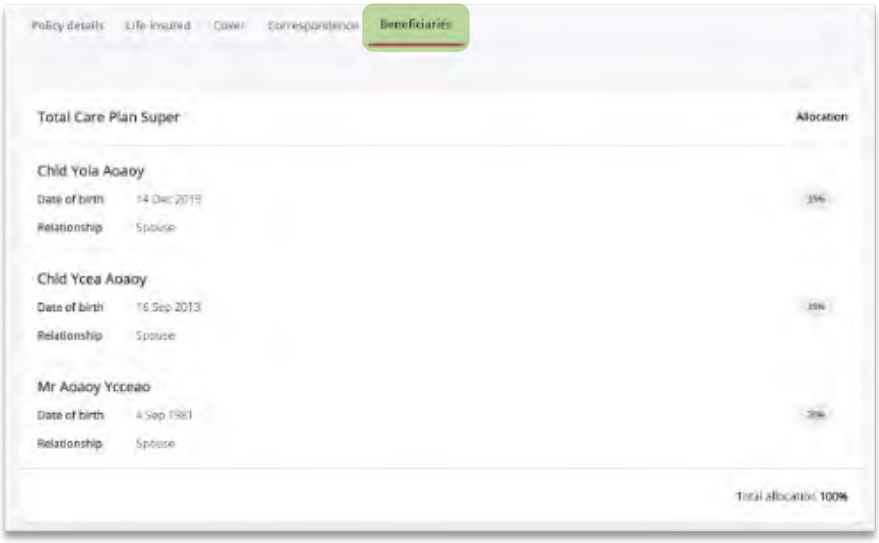
- Policy benefits
- Sum Insured
- Commencement date
- Premium structure
- Special terms (if relevant)

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



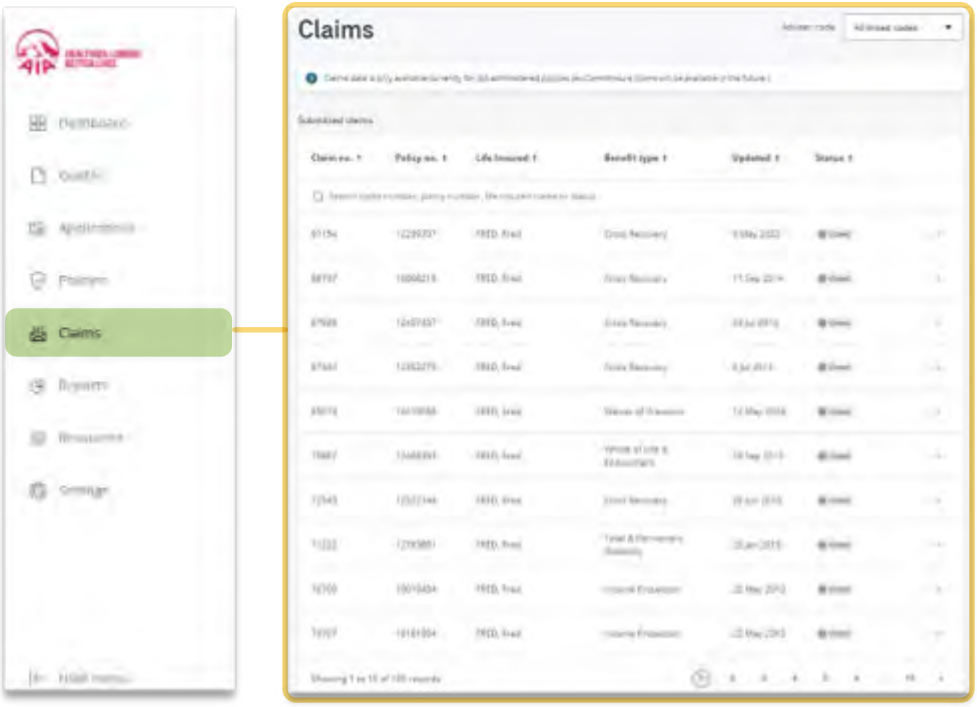
The **Correspondence** tab will display a list of historical correspondences. This includes correspondences such as anniversary letters, cover letters and policy schedules, re-rate/ rate rise letters etc.

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

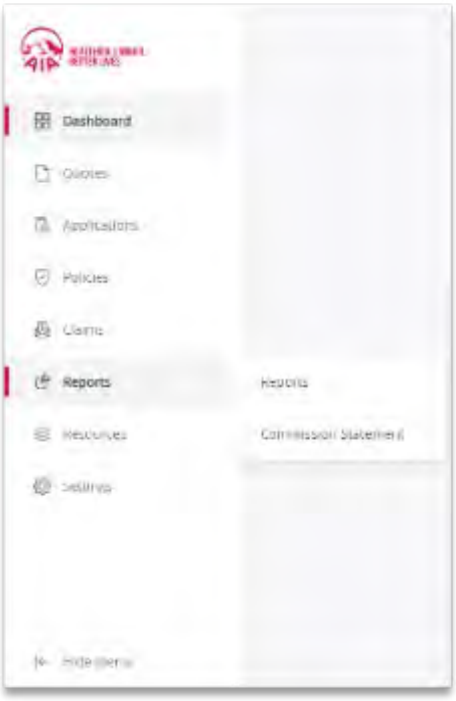
Under Assessment

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:

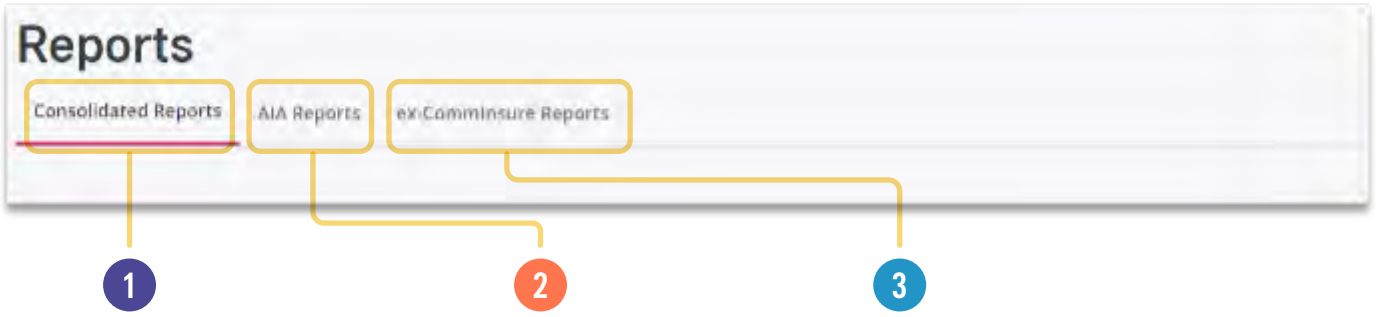
8. Reports



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:



Consolidated Reports

Combined report for AIA and ex-CommInsure policies

AIA Reports

Reporting suite available for AIA policies only

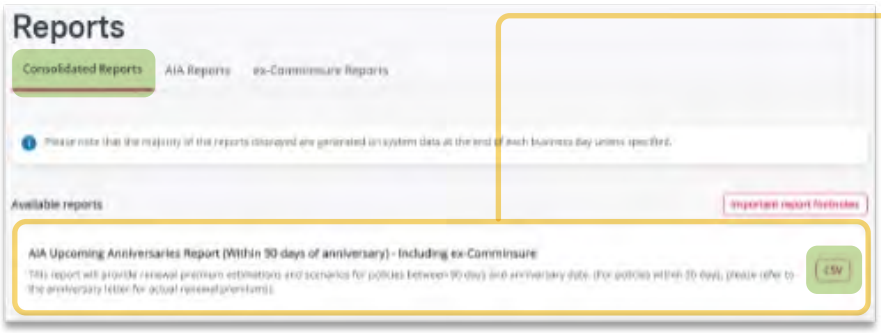
ex-CommInsure Reports

Reporting suite available for ex-CommInsure policies only

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

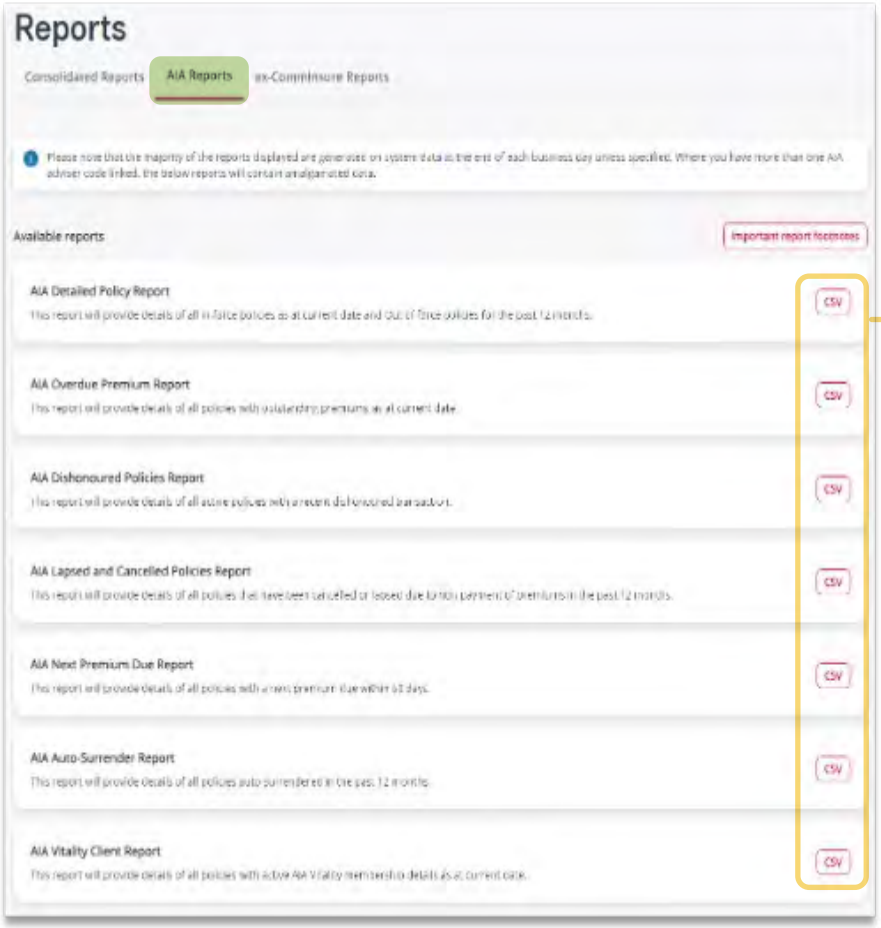
In the Consolidated Reports tab, there is currently one report that is available:



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

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-CommInsure Reports

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

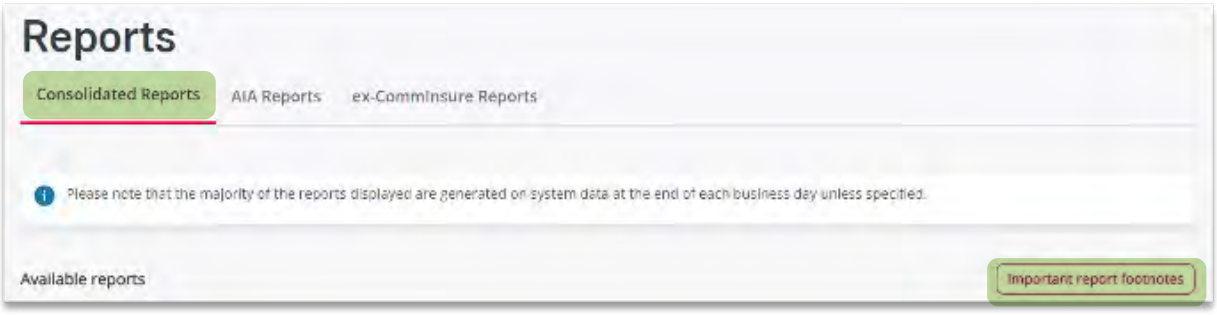
1. **ex-CommInsure policies with non-payment**
2. **ex-CommInsure In-Force Portfolio**

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

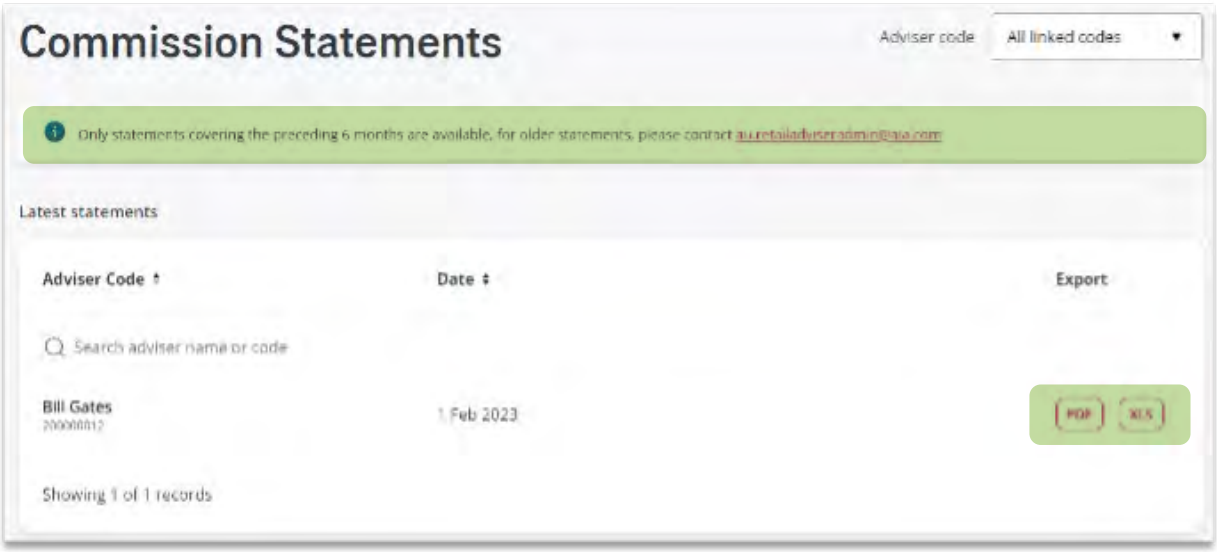
At the top of each reporting section, there is a button to view important report footnotes. This section provides an overview of the reports available, how some fields are calculated, the time/duration of the report criteria and other important information.



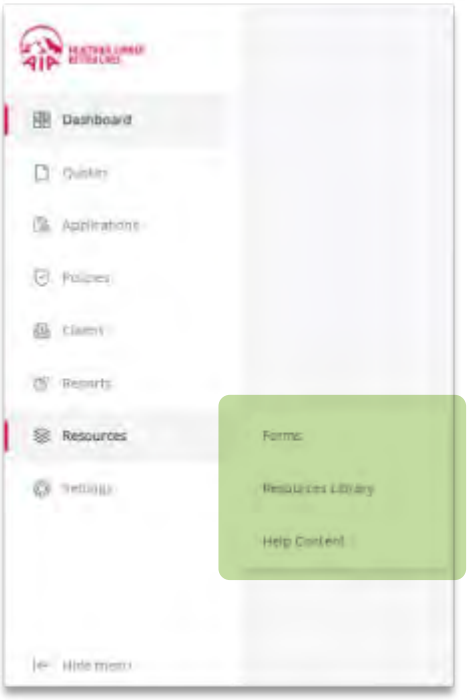
8.1.5 Commission Statements

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.

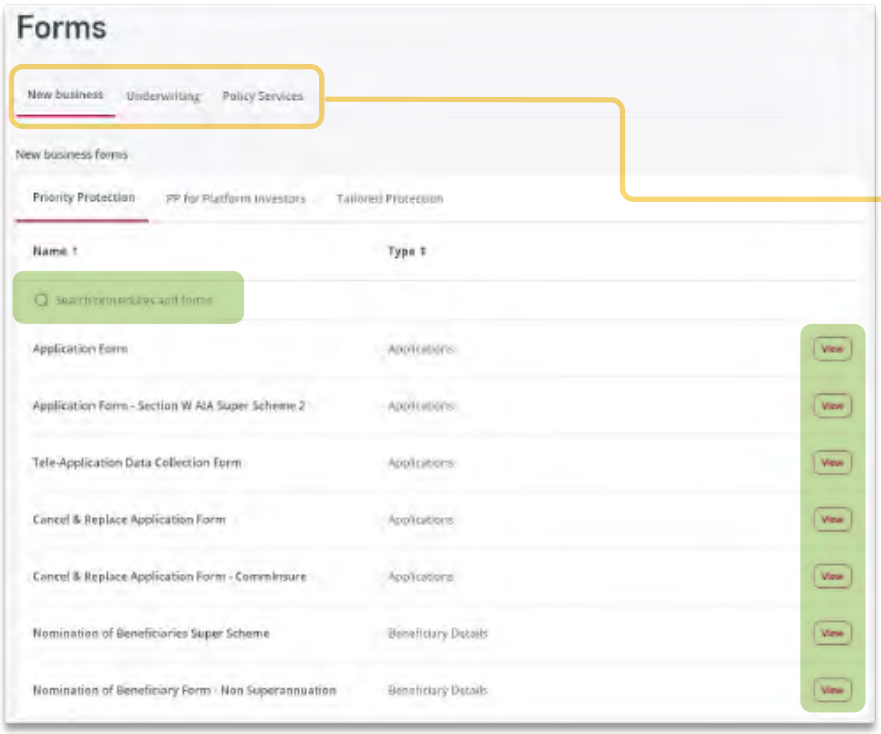


9. Resources



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:

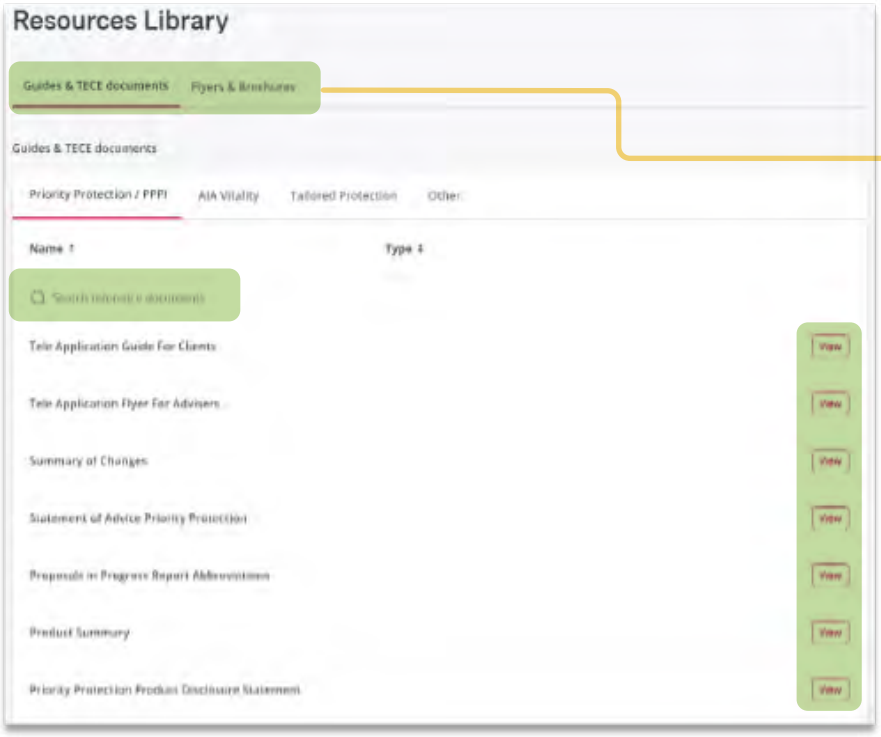
1. **New Business**
2. **Underwriting**
3. **Policy Services**

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**

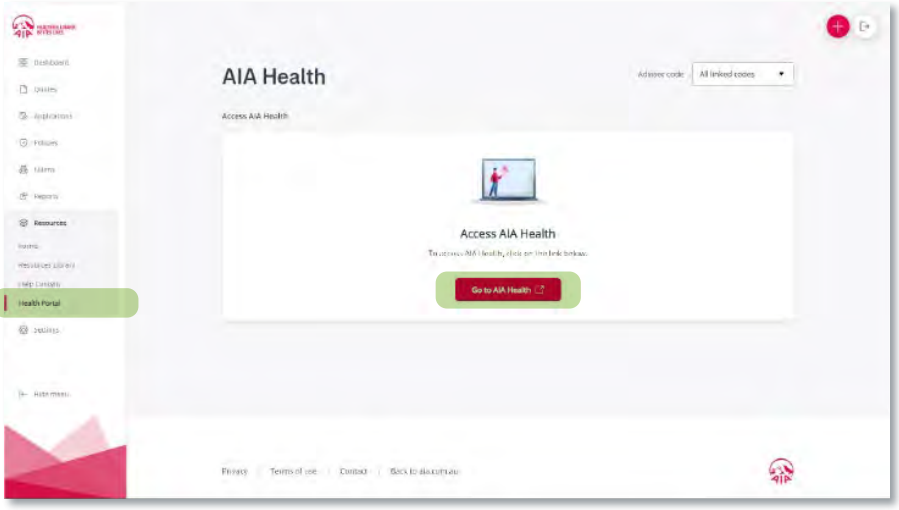
Within each section, you can view the resources available for Priority Protection/ PPI (AIA), AIA Vitality, Tailored Protection (ex-CommInsure) or Other.

To view the form, click on the view button.

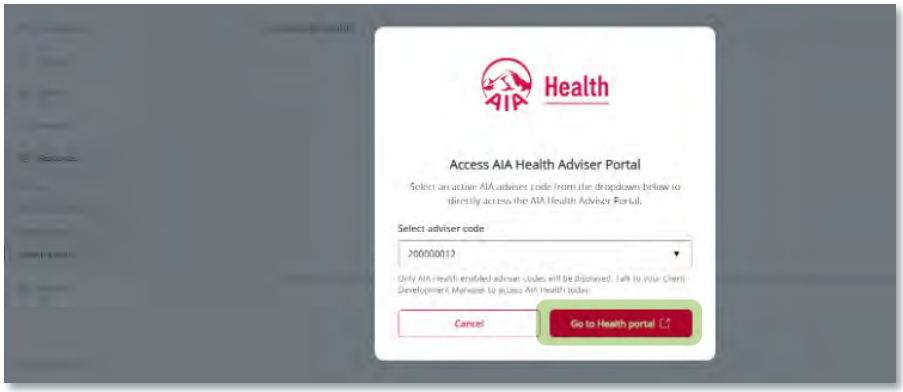
You can also search for a form by entering the name of the form in the search field.

9.3 Adviser Health Portal

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

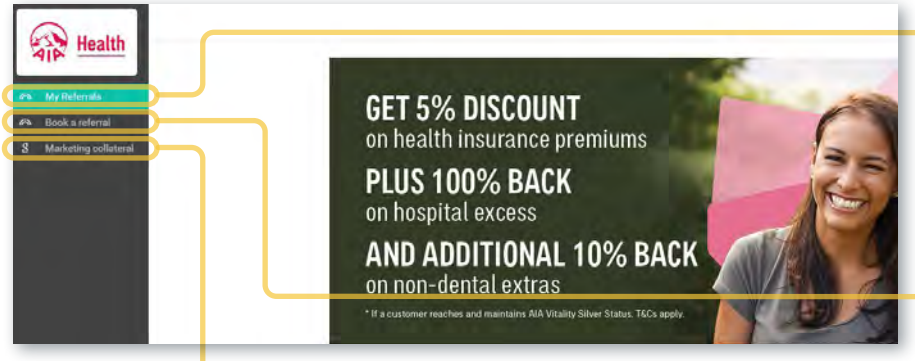


Select your adviser code and click the 'Go to Health Portal' button.



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:

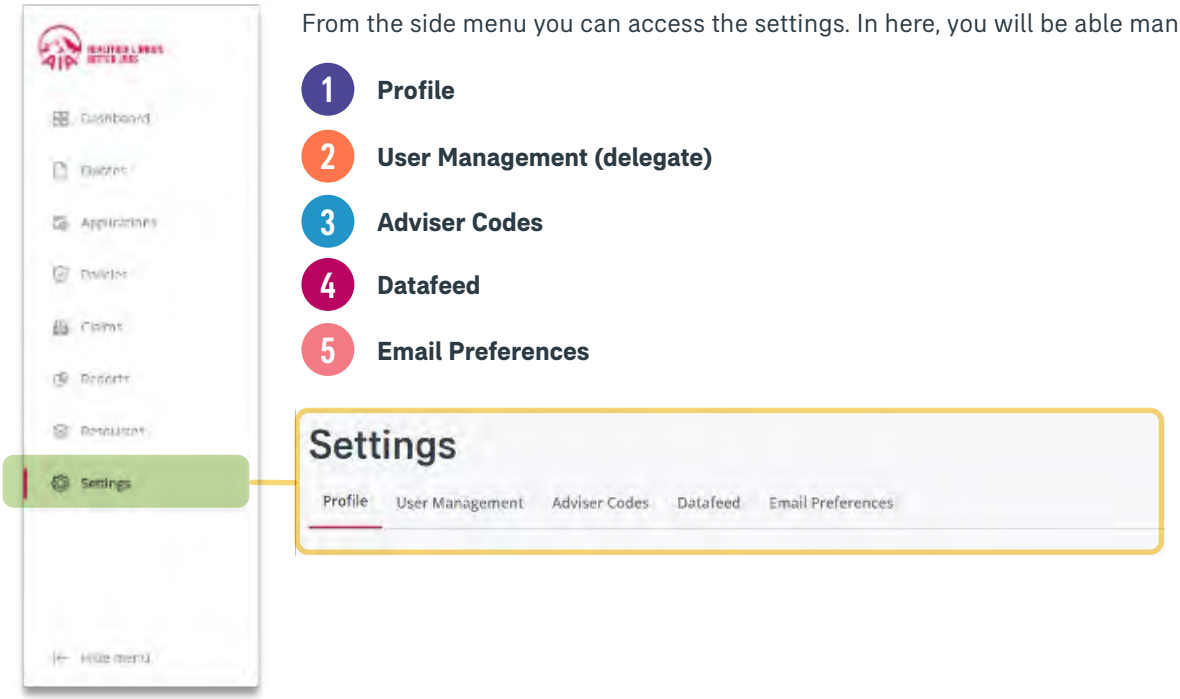


1 **My Referrals**
Find and download your client's details, see the progress of their referral, and the estimated referral fee. It can take up to 15 minutes to refresh, so please allow time after submitting a referral.

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



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

1 **Profile**

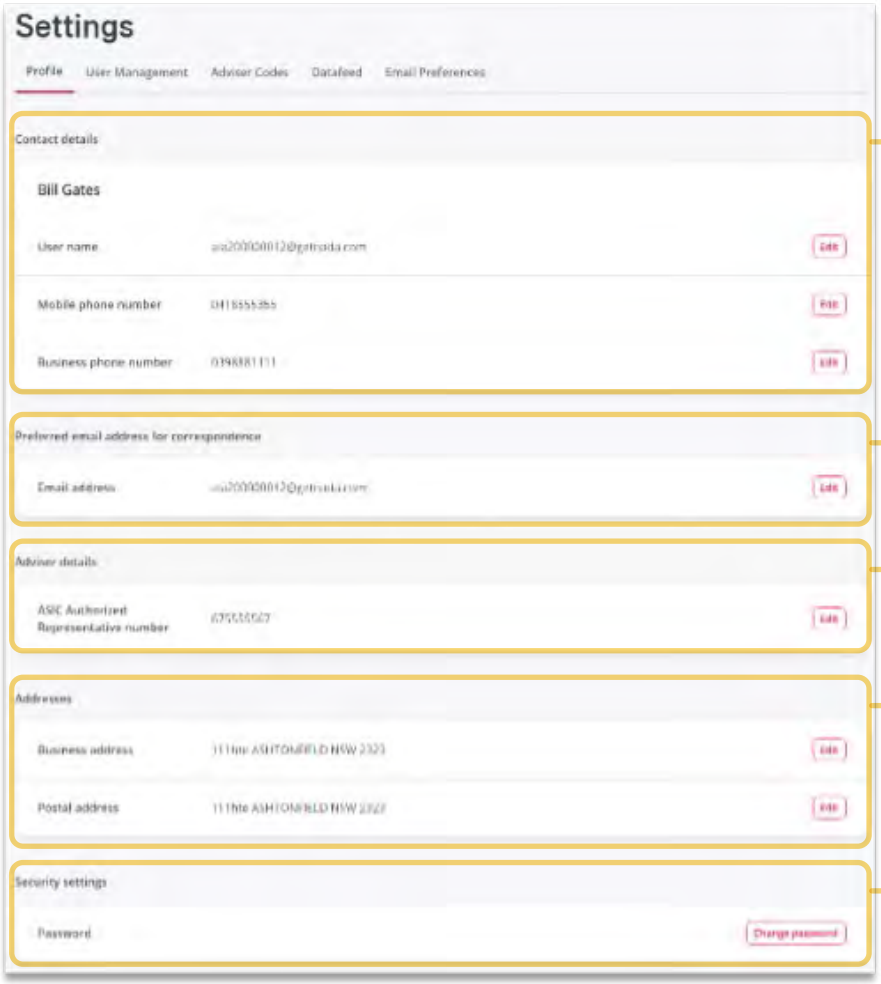
2 **User Management (delegate)**

3 **Adviser Codes**

4 **Datafeed**

5 **Email Preferences**

10.1 Profile



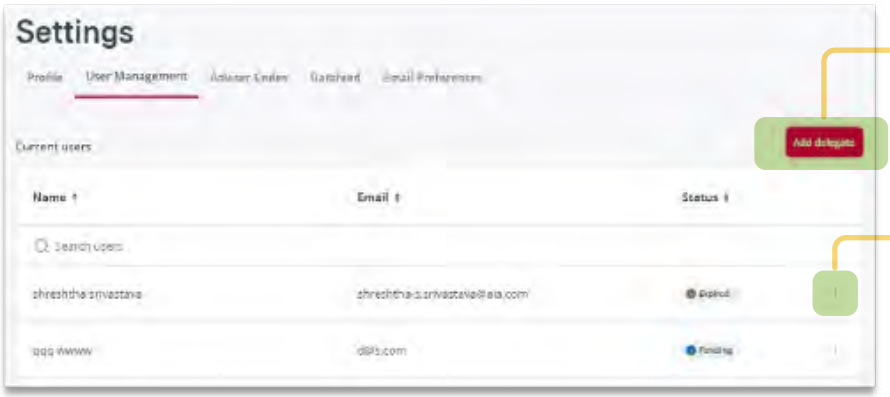
In the profile settings, you will be able to edit the following information:

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.

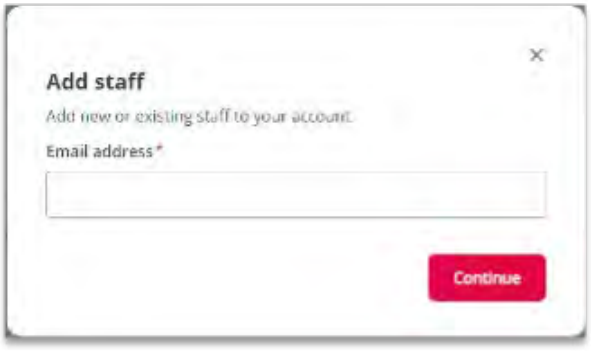


To add a delegate user, click on the **Add delegate** button.

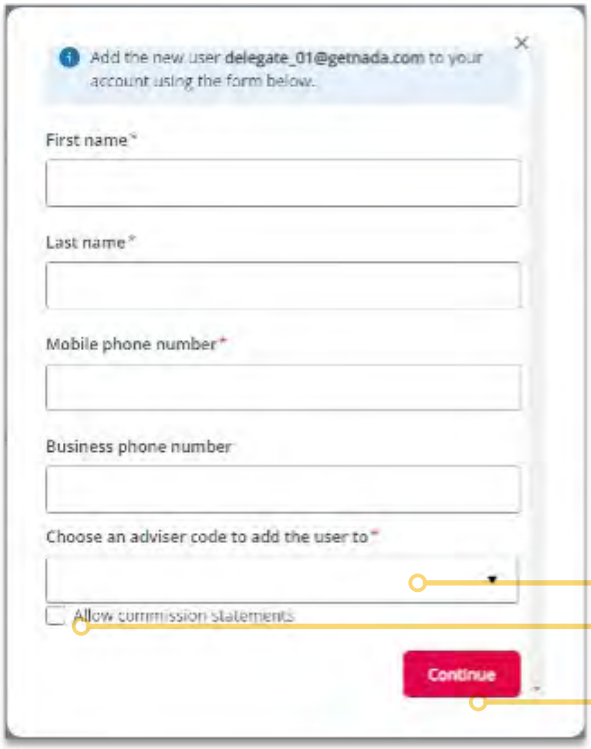
To view the delegate user profile or unlink their access, click on the button on the right-hand side for that profile.

10.2.1 Add delegate

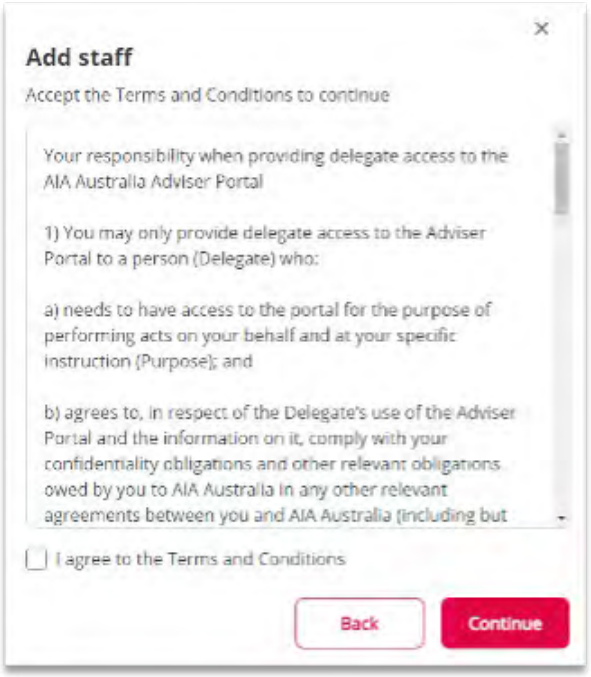
To add a new delegate to your account, click on the add delegate button.



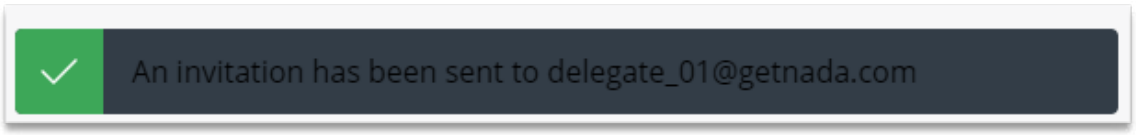
1. Fill in the information as illustrated



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

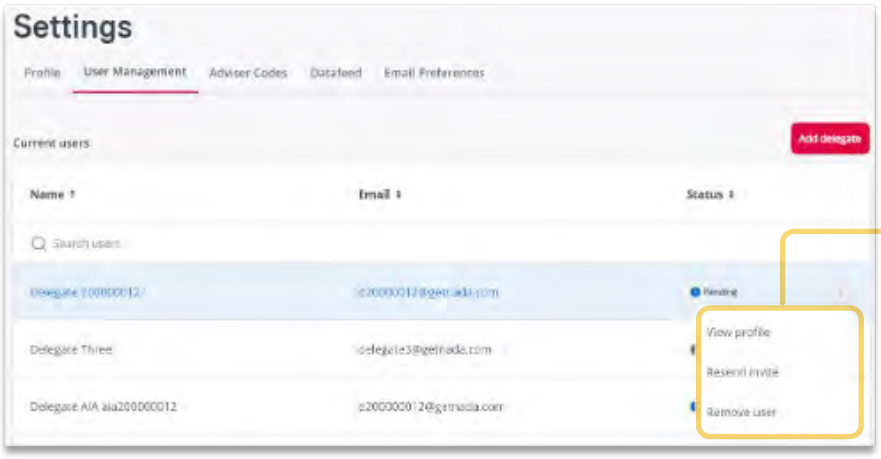


You will then see the notification stating an invitation has been sent to the delegate:



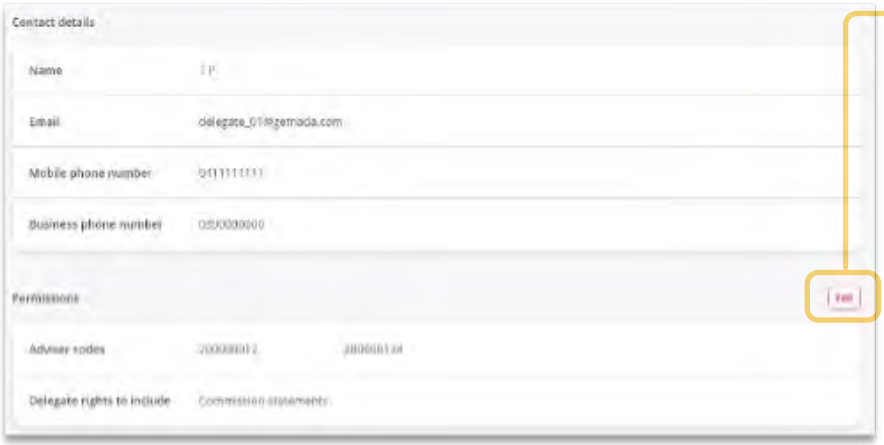
Delegate users will need to activate their account via the email link sent.

10.2.2 View delegate user profile



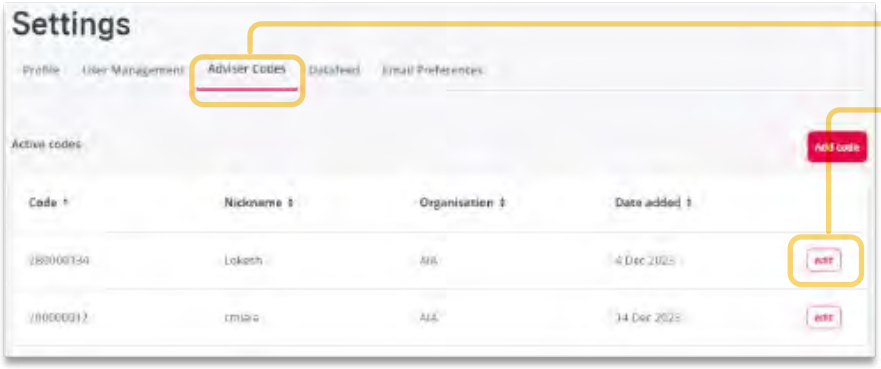
To view the delegate user profile, click on the button on the right-hand side. You will be able to:

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.

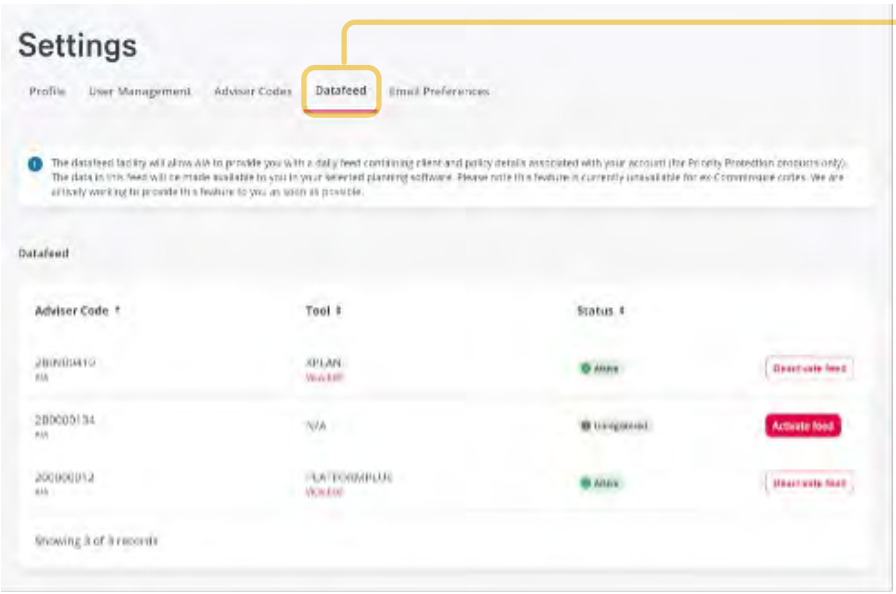
Edit adviser code:
You will only be able to edit the "nickname" assigned to the adviser code via the **edit** button. No other information can be amended.

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** btton.

10.4 Datafeed

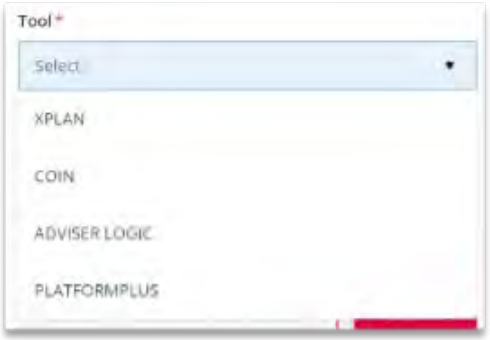
10.4.1 Activate datafeed

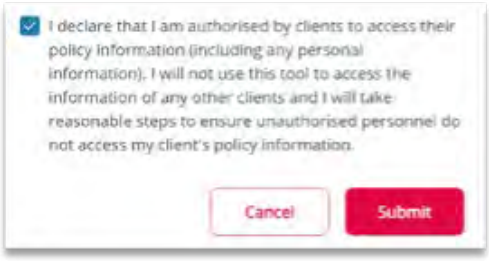


To activate the datafeed for any of the adviser codes, click on the **Datafeed** tab and select the adviser code that you want to activate.

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

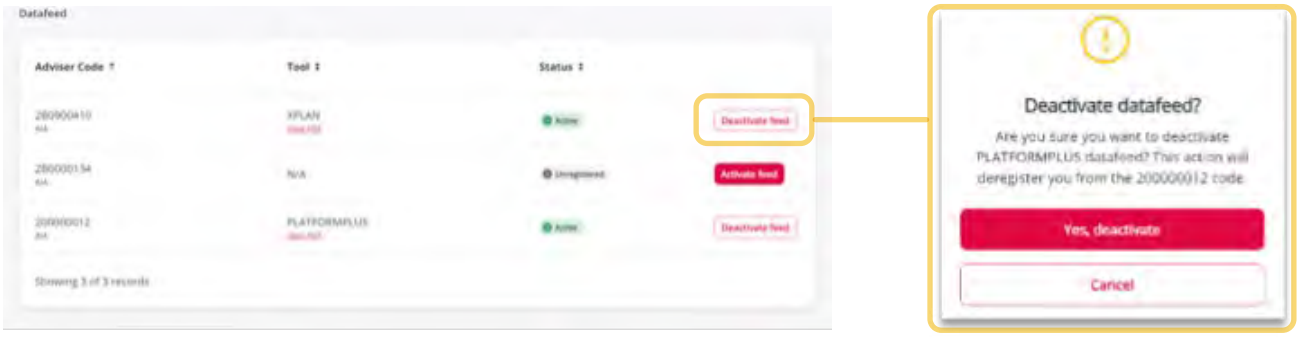
Select from the list of tools available, click on the declaration box and click submit to activate the datafeed.



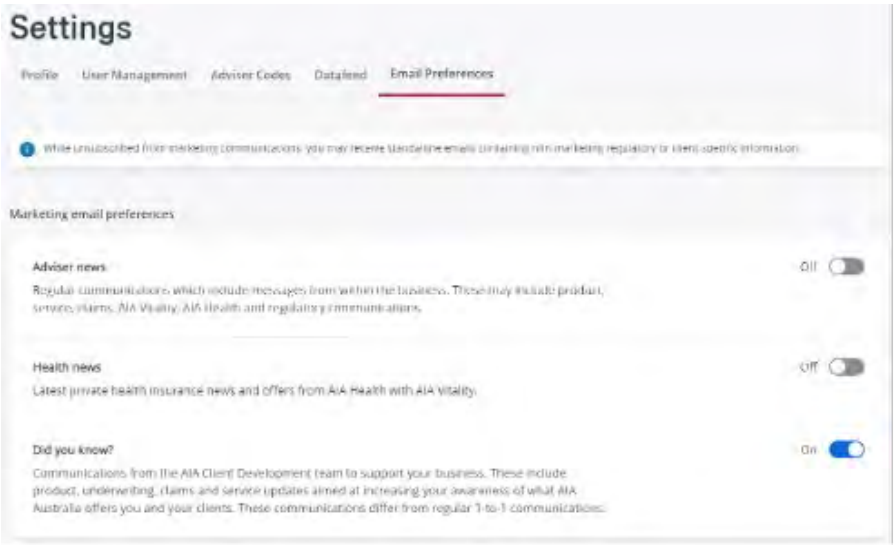


10.4.2 Deactivate datafeed

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



10.5 Email preferences



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

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04/24 – IAS7971