



HEALTHIER, LONGER,
BETTER LIVES

AIA ADVISER PORTAL USER GUIDE

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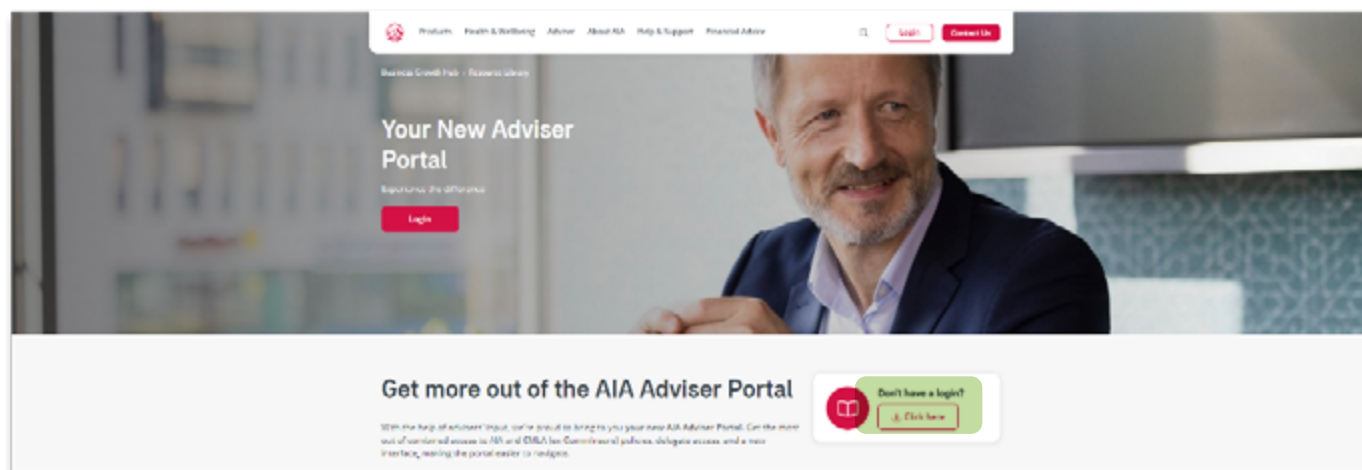
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1. Getting started

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

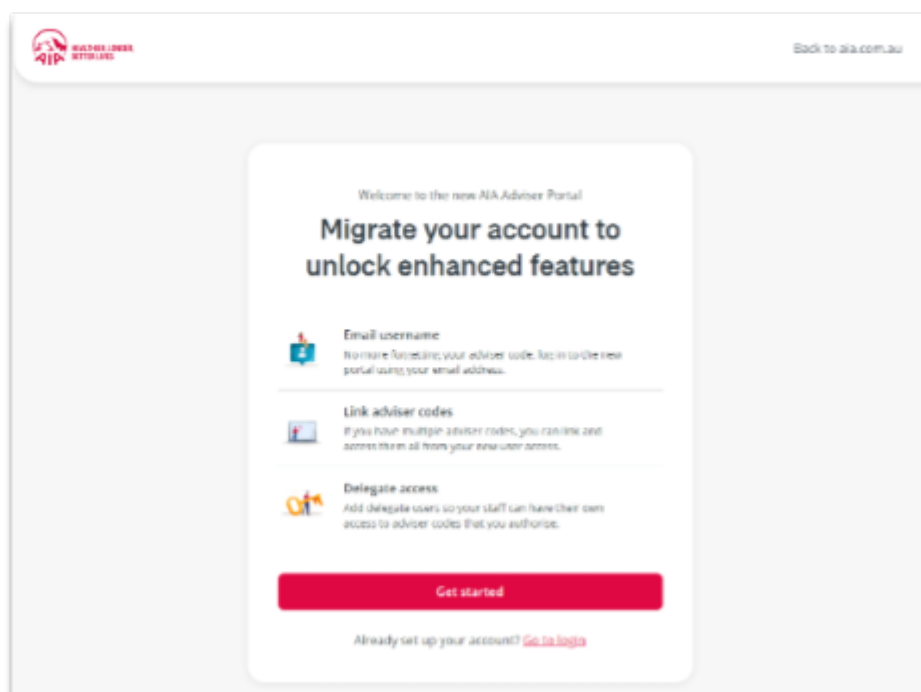
All active advisers and Licensees (via the nominated Responsible Individual user account) have access to the AIA Adviser Portal.

Using your AIA or ex-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.



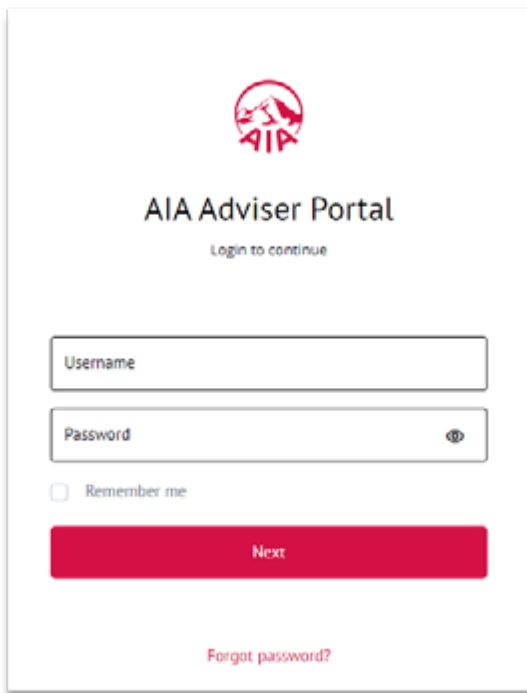
1.1 First time Logging in: Migration of existing adviser code access

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



The login form for the AIA Adviser Portal. It features the AIA Adviser Portal logo at the top, followed by the text "Login to continue". Below this are two input fields: "Username" and "Password". There is a "Remember me" checkbox and a "Next" button. At the bottom, there is a link for "Forgot password?".

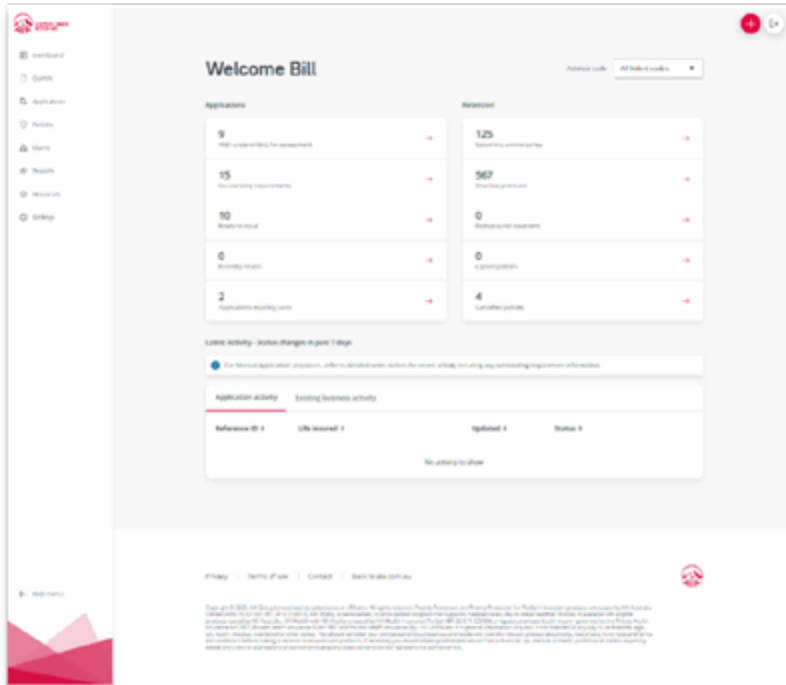
Once you have successfully migrated to the new AIA Adviser Portal, you can now log in via this [link](#) with your email address and password used to set up your access.

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.



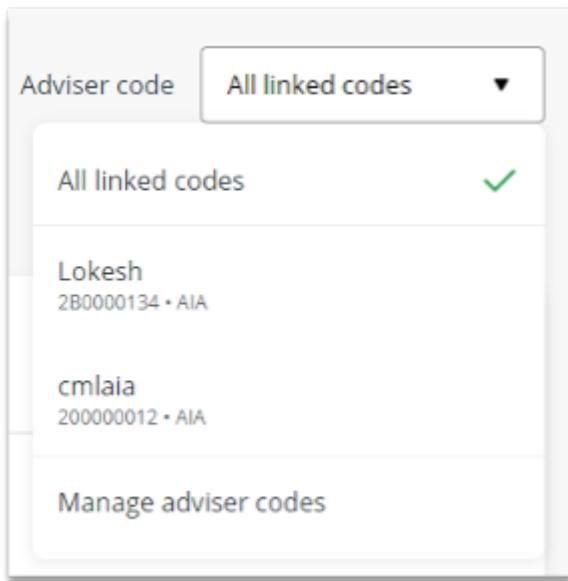
Logging into the new adviser portal is via your email address and password. You no longer need your adviser code to log in.

2. Dashboard



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.

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



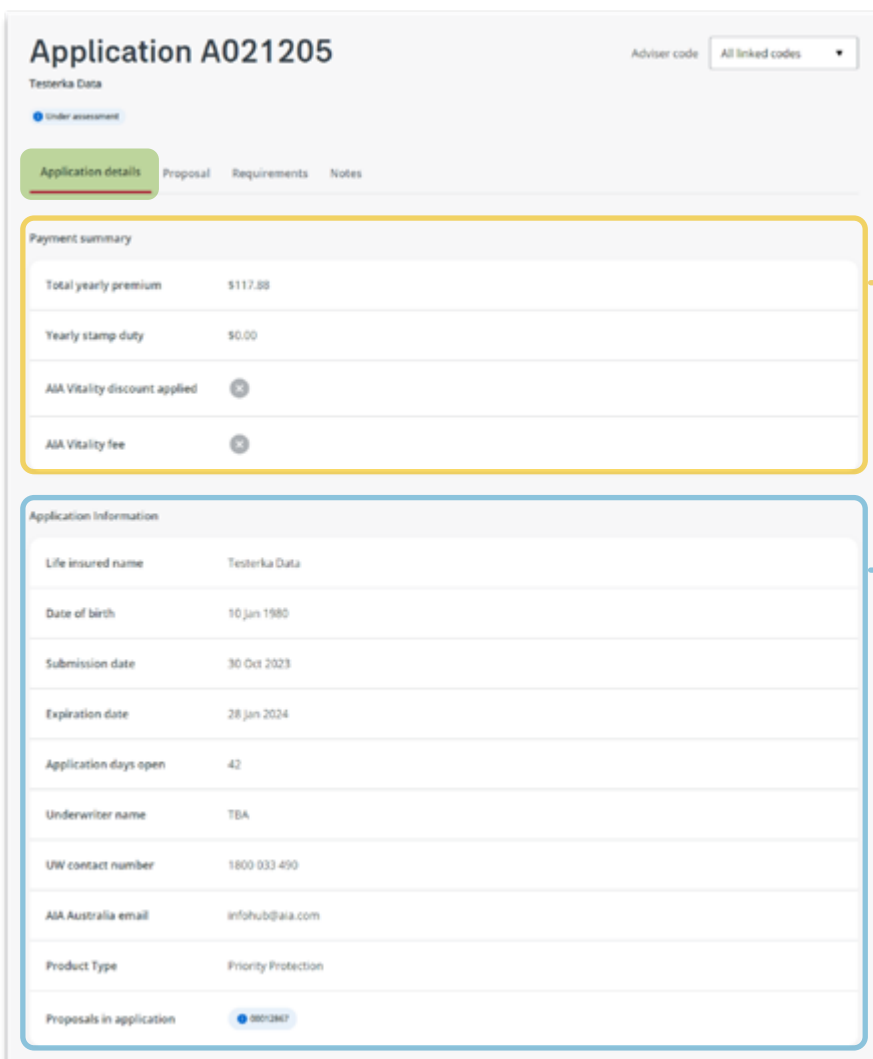
The dashboard shows a table of applications with underwriting for assessment. The table has columns for Life insured, Application ID, and Updated. The data is as follows:

Life insured	Application ID	Updated
Testerka Data	A021205	28 Oct 2023
Scenario 1a Referred	A021003	28 Jan 2023
Scenario 1g	A021005	28 Jan 2023
Scenario 1f Scenario 1f	A021002	28 Jan 2023
Scenario 1a Fulling	A021002	28 Jan 2023
Scenario 1a Referred	A021002	28 Jan 2023
Carla Mulgrew	A021002	28 Jan 2023

Showing 7 of 8 records

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 application details page for Application A021205 (Testerka Data) shows the following sections:

Application A021205

Testerka Data

Adviser code: All linked codes

Under assessment

Application details | Proposal | Requirements | Notes

Payment summary

Total yearly premium	\$117.88
Yearly stamp duty	\$0.00
AIA Vitality discount applied	0%
AIA Vitality fee	0%

Application Information

Life insured name	Testerka Data
Date of birth	10 Jun 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	9801267

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.

Application details **Proposal** Requirements Notes

Proposal 00012867

Under assessment

Owner name	Payment frequency	Coverage	Commission structure	Premium discount
Testerka Data	HALF_YEARLY	No	Upfront 2020	P100

Instalment premium payable	\$5.47
Instalment stamp duty	\$0.00
Policy fee	\$49.40
AIA Vitality fee	\$0.00
Total instalment payable	\$54.87

XDT - Life Cover, Stepped, Expiry age 100

Pending

Proposal:

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

Application A021205

Testerka Data

Under assessment

Application details Proposal **Requirements** Notes

Requirement upload

Documents uploaded will remain in "Outstanding requirement" until reviewed by underwriter.

Upload requirement View uploaded documents

Underwriting requirements

No activity to show

Admin requirements

Credit Card Authority
Required on 30/03/2023
Proposal 00012867

To finalise processing this application, we require your client to fill out a Direct Debit or Credit Card Authority. Please provide this as soon as possible.

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.

Application A021205

Testerka Data

Under assessment

Application details Proposal Requirements **Notes**

Notes to the adviser

30-Jun-2023	Please note that additional underwriting requirements may be requested following assessment by our underwriters.
30-Jun-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-Jun-2023	If we have requested information for external parties, we have used the authority form/s 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 Insured	Application ID	Upload	Pending requirements
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement
TECHNICAL	12000000	18 Aug 2023	Manual requirement

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 Insured	Application ID	Upload
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 Aug 2023
TECHNICAL	12000000	18 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



Dashboard

Quota

Applications

POLICIES

Claims

Experts

Resources

Settings

9

with underwriting for assessment

15

Outstanding requirements

10

Ready to issue

0

Recently issued

2

Applications requiring review

125

upcoming anniversaries

567

Quotation premiums

0

Recommended payments

0

Issued policies

4

Cancelled policies

Latest Activity - Status changes in past 7 days

See Notes on application proposals - refer to detailed notes section for the reason why, including any outstanding requirement information.

Application activity

Existing business activity

Reference ID

Life Insured

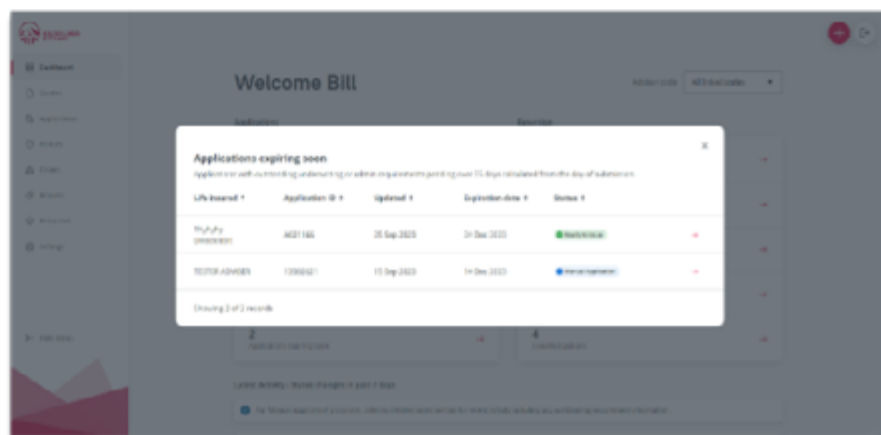
Upload

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).



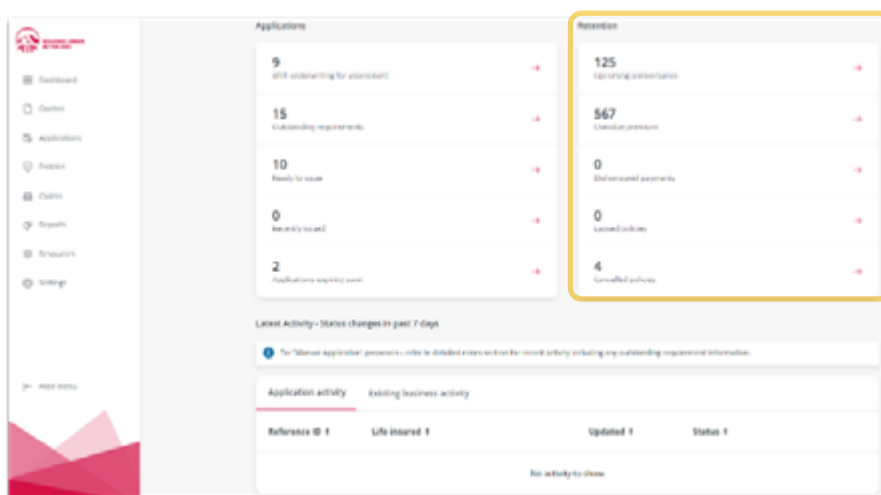
Applications expiring soon:

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

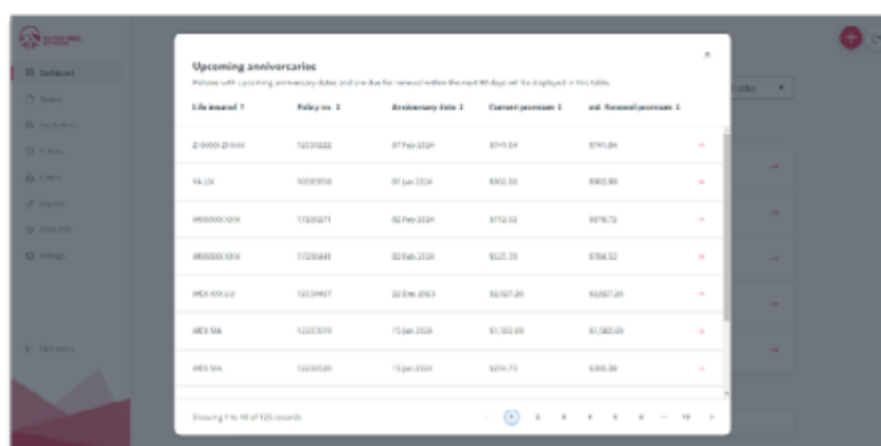


The retention dashboard has 5 tabs showing policies that meet the following criteria:

- 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

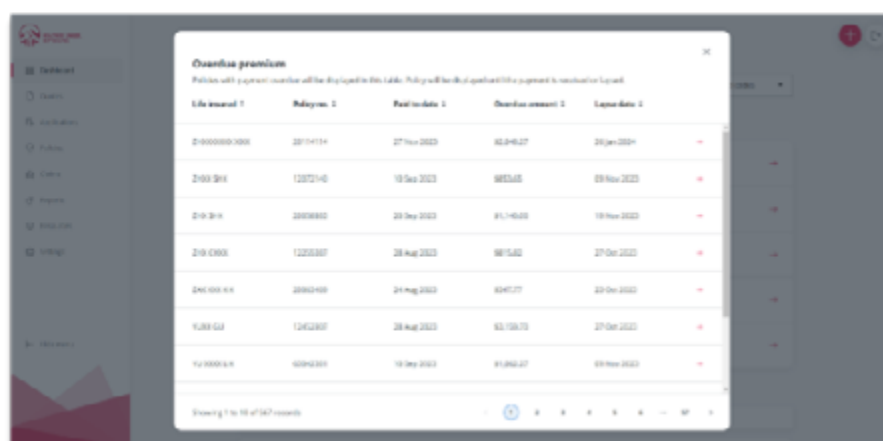


Upcoming anniversaries:

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 payment overdue will be displayed in this table. Policy will be displayed until payment is received or policy lapses.

Life insured #	Policy no. #	Paid to date #	Overdue amount #	Lapse date #
2-000000-0000	20174134	27 Nov 2023	\$2,246.27	26 Jan 2024
2-000 304	12072140	10 Dec 2023	\$855.05	09 Nov 2023
2-10 304	20008802	20 Sep 2023	\$1,140.00	19 Nov 2023
2-10 0000	12003307	28 Aug 2023	\$815.82	27 Oct 2023
2-00 000 000	20002400	24 Aug 2023	\$247.77	23 Dec 2023
1-000 000	12402007	28 Aug 2023	\$3,158.70	27 Oct 2023
1-0000 000	00002000	10 Sep 2023	\$1,068.27	09 Nov 2023

Showing 1 to 10 of 167 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.

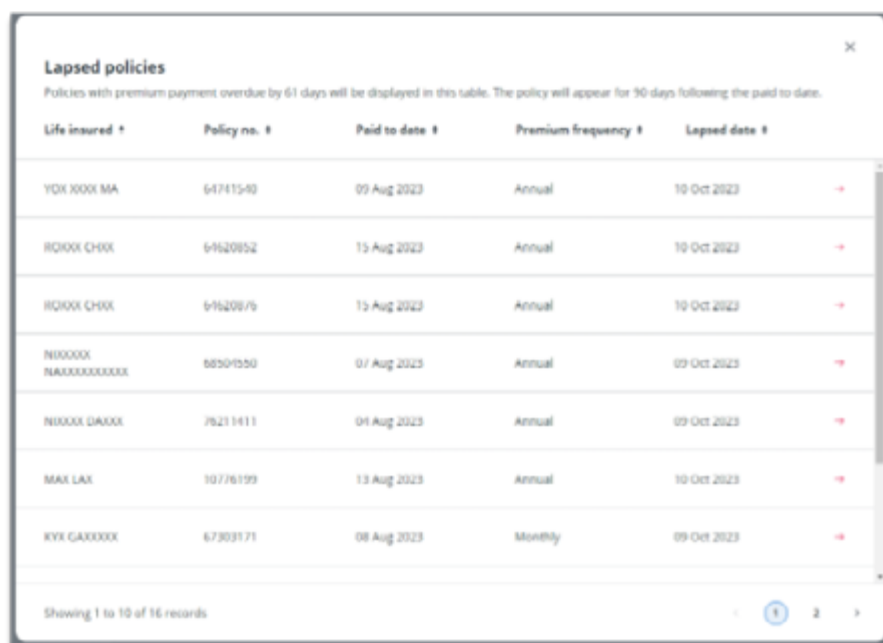
Life insured #	Policy no. #	Dishonour date #	Next debit #	Lapse date #
3A TESTDATA	00012634	01 Sep 2023	22 Oct 2023	22 Sep 2024

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 #
YDX XXXX MA	64741540	09 Aug 2023	Annual	10 Oct 2023
RQXXX CHXX	64620852	15 Aug 2023	Annual	10 Oct 2023
RQXXX CHXX	64620876	15 Aug 2023	Annual	10 Oct 2023
NXXXXX NXXXXXXXXXXXX	68501050	07 Aug 2023	Annual	09 Oct 2023
NXXXXX DAXXX	76211411	04 Aug 2023	Annual	09 Oct 2023
MAX LAX	10776199	13 Aug 2023	Annual	10 Oct 2023
KYX GAXXXXX	67303171	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 DOUGH or comply with any other reinstatement rule requirements.

2.3.5 Cancelled policies

Policy ID #	Policy No.	Date to Date	Premium Frequency	Cancellation Date
010001200001	07000100	25 Aug 2023	Monthly	21 Sep 2023
010001200002	08001200	18 Sep 2023	Monthly	20 Oct 2023
010001200003	09000100	25 Aug 2023	Monthly	27 Sep 2023
010001200004	10000100	18 Aug 2023	Annual	20 Sep 2023

Showing 4 of 4 records

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.

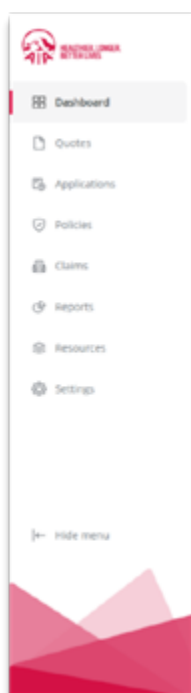
2.4 Latest Activity – Status changes in past 7 days

Reference ID #	Life insured #	Updated #	Status #
A021205	Testorika Dula	30 Oct 2023	Under assessment

Showing 1 of 1 records

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.

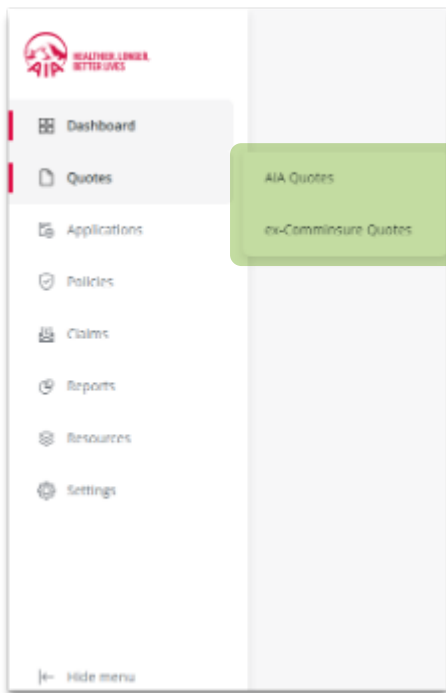
3. Side Menu



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.

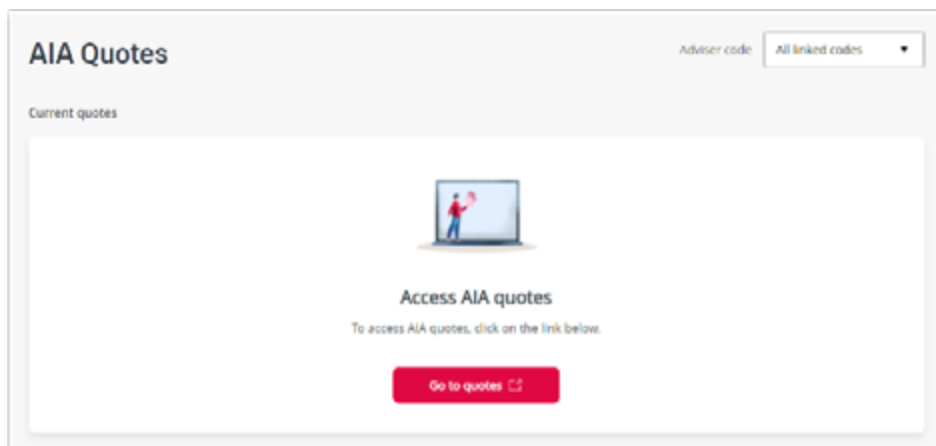
4. Quotes



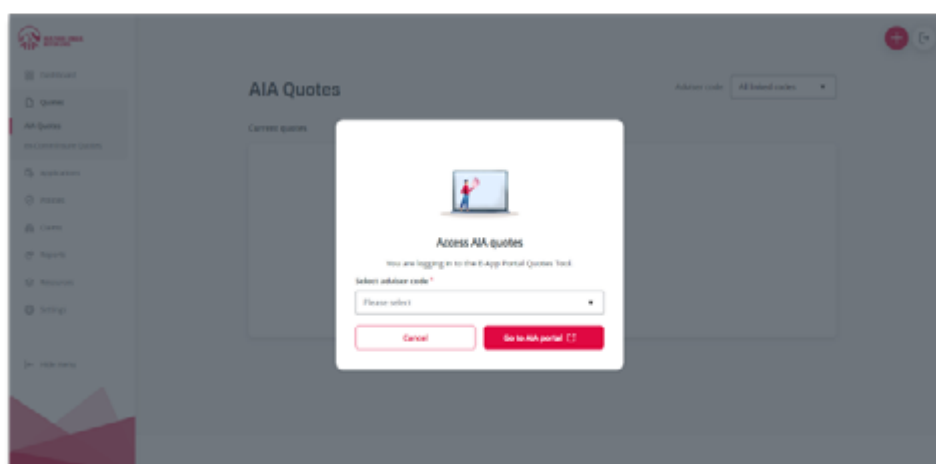
From the side menu, you can access the Quoting platforms for AIA or ex-CommInsure.

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

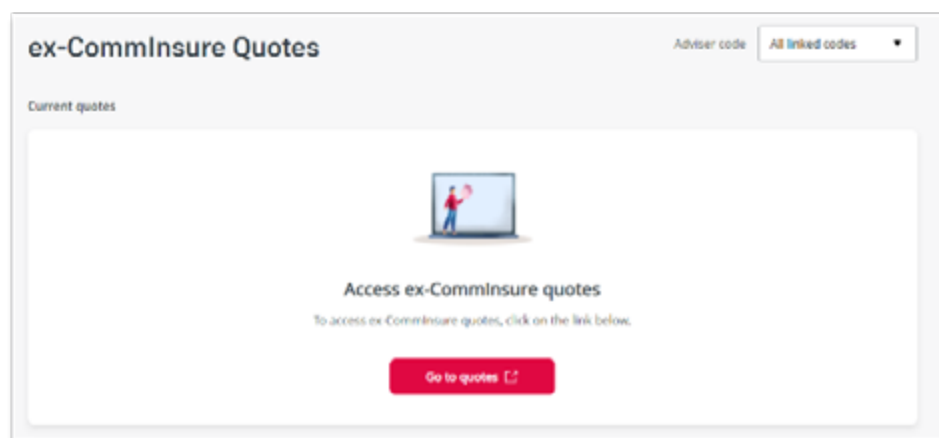


To access AIA quoting platform, select AIA Quotes. You will be required to select one of your AIA adviser codes (if you have multiple codes) to log into eApp portal via SSO as shown in the illustrations below.



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

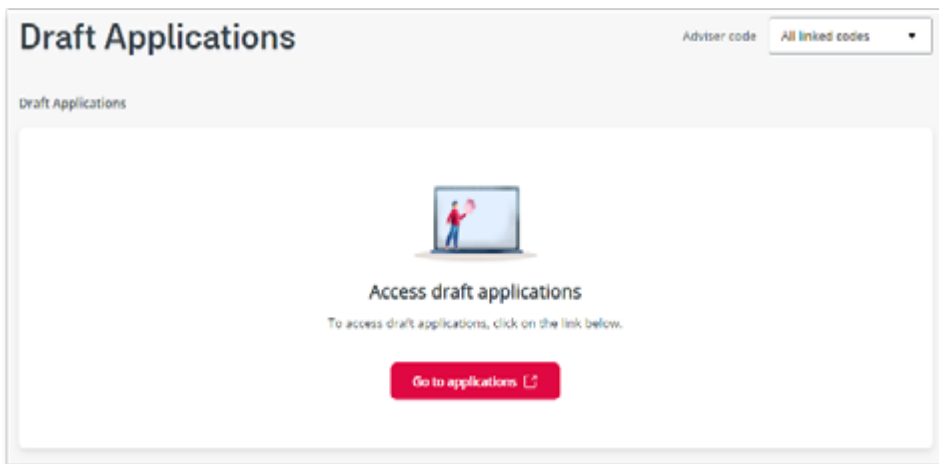
The information displayed in this section is similar to the information displayed in the Applications dashboard. This section provides a consolidated view of all applications in progress and their status.

Application ID	Proposal ID	Life Insured	Updated	Status
A021295	00012867	Testeska Data	30 Oct 2023	Under assessment
A021178	00012844	Fcd Tester	13 Oct 2023	Ready to issue
A021166	00012831	Thylyhy Directdebit	25 Sep 2023	Ready to issue
A021152	00012809	Efele Efelefe	8 Sep 2023	Ready to issue
A021199	00012797	Uicbill Test	8 Sep 2023	Ready to issue
A021190	00012794	Data Multiproposal	6 Sep 2023	Under assessment
A021099	00012792	3DNew Data	6 Sep 2023	Ready to issue
A021098	00012790	6aNEWER Data	5 Sep 2023	Cancelled or withdrawn
A021097	00012788	6ANEWdata Cancelled	5 Sep 2023	Declined
A021092	00012780	4Anewdata Tester	4 Sep 2023	Under assessment

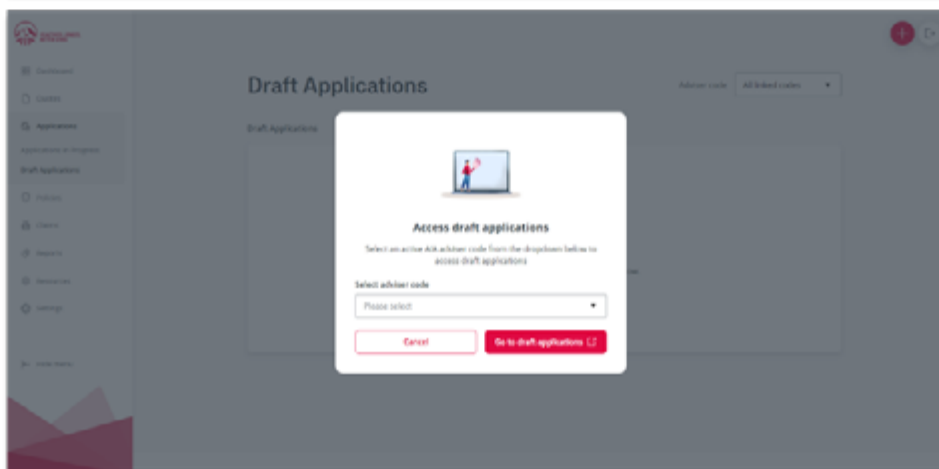


By clicking on any of the table headings, you can sort the data in “order” or “reverse order” for that heading, to aid searching for a specific case. Alternatively enter part of any data field displaying in the search box and closest matches will only appear in the list.

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.

The screenshot shows the AIA Adviser Portal interface. On the left, a sidebar menu lists various functions: Dashboard, Quotes, Applications, Policies (highlighted), Claims, Reports, Resources, and Settings. A green callout box highlights the 'In-force' and 'Out of Force (90 days)' options under the Policies section. The main content area displays the 'In-force Policies' screen. At the top, there are 'Key insights' showing 'Total annual premium \$3,004,086.57' and 'Policies 893'. Below this is a table titled 'Policies in-force' with columns: Policy no., Life insured, Organisation, Updated, and Status. The table lists several policies with their respective details and status indicators (e.g., 'Overdue premium', 'Upcoming anniversary').



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

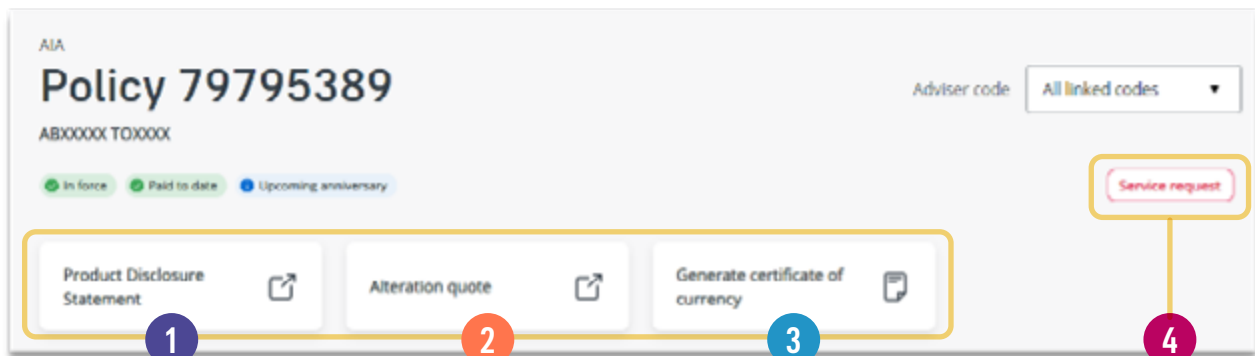
This screenshot shows a detailed view of a policy within the 'Policies in-force' section. It includes the same 'Key insights' at the top. The table below shows a list of policies, with one policy (79795389) highlighted in blue, indicating it is the selected policy for detailed viewing. The table columns are: Policy no., Life insured, Organisation, Updated, and Status.

Policy no.	Life insured	Organisation	Updated	Status
79882262	ROXXXX AUXXX	AIA	26 Aug 2023	Overdue premium
79842208	RAXXXX HEXXXX	AIA	14 Sep 2023	Overdue premium
79833287	CHXXXX HEXXXX	AIA	13 Sep 2023	Overdue premium
79795389	ADXXXX TOXXXX	AIA	10 Nov 2023	Upcoming anniversary
79795377	ADXXXX TOXXXX	AIA	10 Nov 2023	Upcoming anniversary

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.



1 Product Disclosure Statement

This tile will redirect you to the PDS database

2 Alteration quote

This tile will redirect you to the Requote tool

3 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).

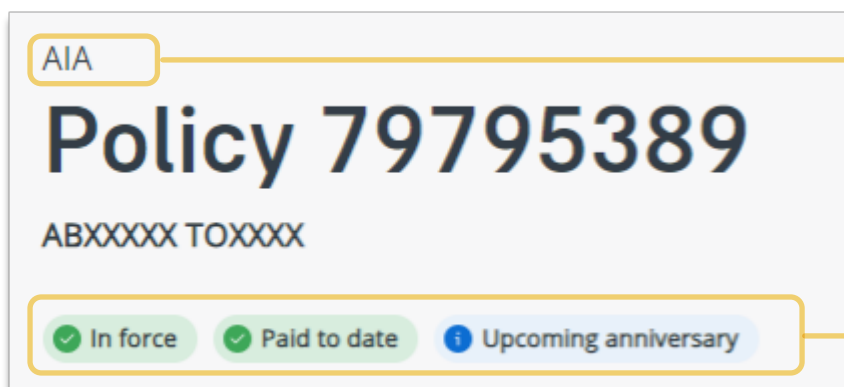
4 Service request

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

AIA

Policy 79795389

ABXXXX TOXXXX

Adviser code: All linked codes

Is first • Paid to date • Upcoming anniversary

Service request

Product Disclosure Statement | Alteration quote | Generate certificate of currency

Policy details | Life insured | Cover | Correspondence | Beneficiaries

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

Including indexation	\$2,018.35
Excluding indexation	\$1,907.39
Anniversary date	10 Jan 2024

Policy details

Product name	Priority Protection (2013)
Commencement date	10 Jan 2018
Linked policies	79795377
Policy owner	ABXXXX TOXXXX
Address	23 XXXXXXXX XXXXXX, Rilly 2075 NSW
Email address	XXXXXX@XXXXXX.com
Phone number	XXXXXX XXXXXX

Premium details

Instalment premium payable with 10% fee	Premium frequency Annual	Paid to date 10 Jan 2024
\$1,821.09		
Payment method	Direct Debit	Edit
BIB number	003001	
Account number	1234567	
Premium structure	Stepped	
AIA Vitality discount Lifestyle	N/A	
AIA Vitality discount Corporate Protection	N/A	
AIA Vitality fee	N/A	
AIA Health discount	N/A	

Commission details

Commission structure	CET5U
Initial percentage	21%
Renewal percentage	10%

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

ABXXXXX TOXXXX

Advertiser code: All linked codes

In force Paid to date Upcoming anniversary Service request

Product Disclosure Statement | Alteration quote | Generate certificate of currency

Policy details | **Life insured** | Cover | Correspondence | Beneficiaries

Details

Life insured	ABXXXXX TOXXXX
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

Edit

Phone number	000000000000
Email address	PPPI5637519@aiaport.com
Address	23 XXXXXXXX XXXXXX, 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

ABXXXXX TOXXXX

Crisis Recovery, Comprehensive, Stepped, Crisis Expiry age 70, LOI Expiry age 100 In force

Sum insured	614,178.80
Instalment premium	61,503.84
Commencement date	10 Jan 2014
Premium structure	Steppled
TFD Definition	LOI
Special terms	

Crisis Recovery Buy Back, Stepped, Expiry age 65 In force

Crisis Reinstatement, Stepped, Expiry age 65 In force

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.

AIA
Policy 79795389
ADXXXXX TCXXXXX

Adviser code: All linked codes ▼

In force
Paid to date
Upcoming anniversary
Service request

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

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

Correspondence

Document #	Date #	
<input type="text" value="Search correspondence name"/>		
Repricing Letter	6 Dec 2020	View

Showing 1 of 1 records

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.

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

Total Care Plan Super		Allocation
Child Yola Aoaoy		
Date of birth	14 Dec 2019	35%
Relationship	Spouse	
Child Ycea Aoaoy		
Date of birth	16 Sep 2013	35%
Relationship	Spouse	
Mr Aoaoy Yceao		
Date of birth	4 Sep 1981	30%
Relationship	Spouse	
		Total allocation 100%

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

Claims

Claims data is only available currently for AIA administered policies (ex-CommInsure claims will be available in the future.)

Submitted claims

Claim no. 1	Policy no. 1	Life Insured 1	Benefit type 1	Updated 1	Status 1
97154	12239707	FRED, Fred	Gross Recovery	9 May 2022	Closed
88737	1080218	FRED, Fred	Gross Recovery	11 Sep 2014	Closed
87026	12457437	FRED, Fred	Gross Recovery	24 Jul 2014	Closed
87344	12352375	FRED, Fred	Gross Recovery	8 Jul 2014	Closed
85013	10419056	FRED, Fred	Waiver of Premium	12 May 2013	Closed
75867	12485593	FRED, Fred	Whole of Life & Endowment	28 Sep 2013	Closed
72543	1252144	FRED, Fred	Gross Recovery	28 Jun 2013	Closed
71222	12783851	FRED, Fred	Total & Permanent Disability	20 Jan 2015	Closed
70709	10016454	FRED, Fred	Income Protection	22 May 2013	Closed
70707	10181254	FRED, Fred	Income Protection	22 May 2013	Closed

Showing 1 to 10 of 100 records

Legend:

- Accepted
- Closed
- Under Assessment

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:

Claim 97154

FRED, Fred

Advisor code: All linked codes

1 Claim status

2 Claim details

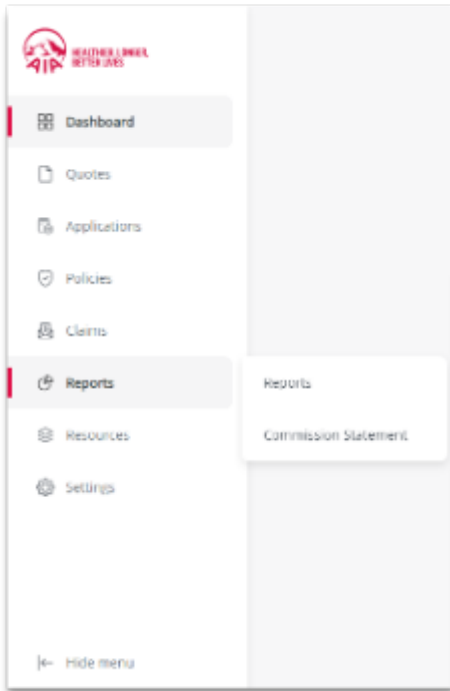
3 Requirements

4 Payments

Claim Detail

Life insured name	FRED, Fred
Policy number	12239707
Date of birth	1 Jun 1959
Gender	FEMALE

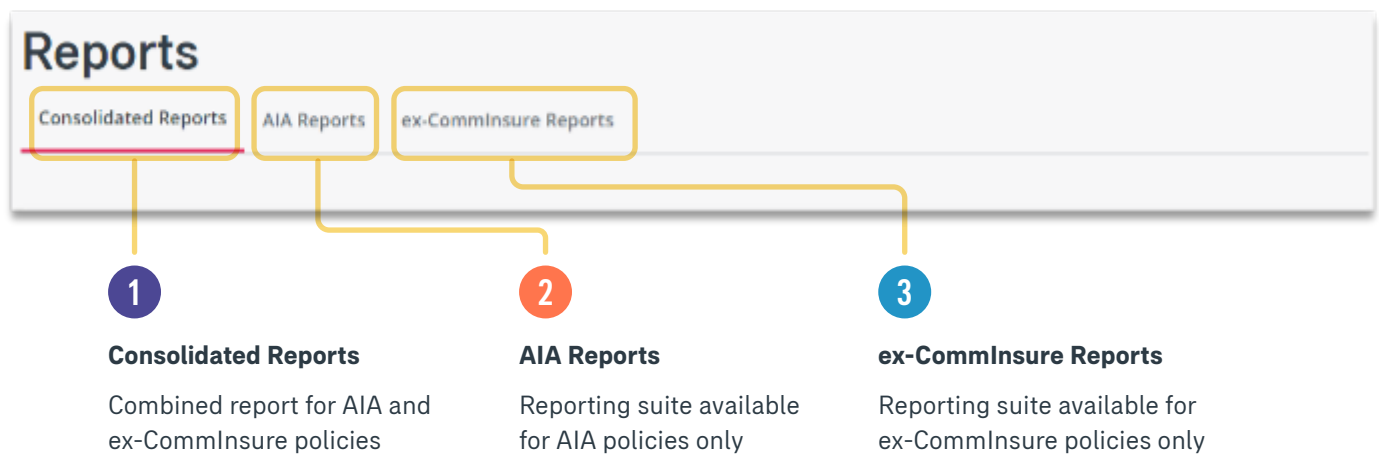
8. Reports



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

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

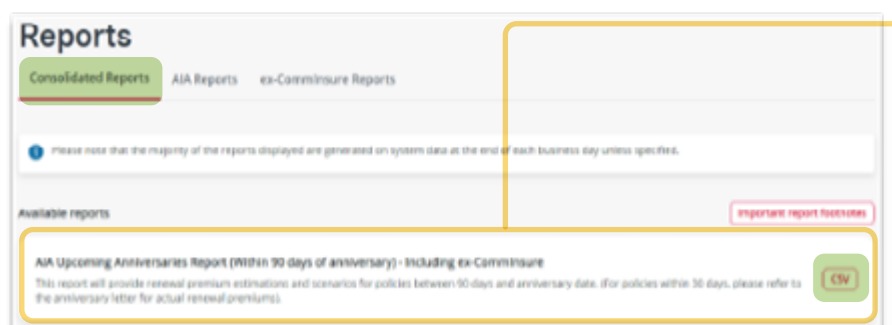
The reports page is split into 3 reporting categories as illustrated below:



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

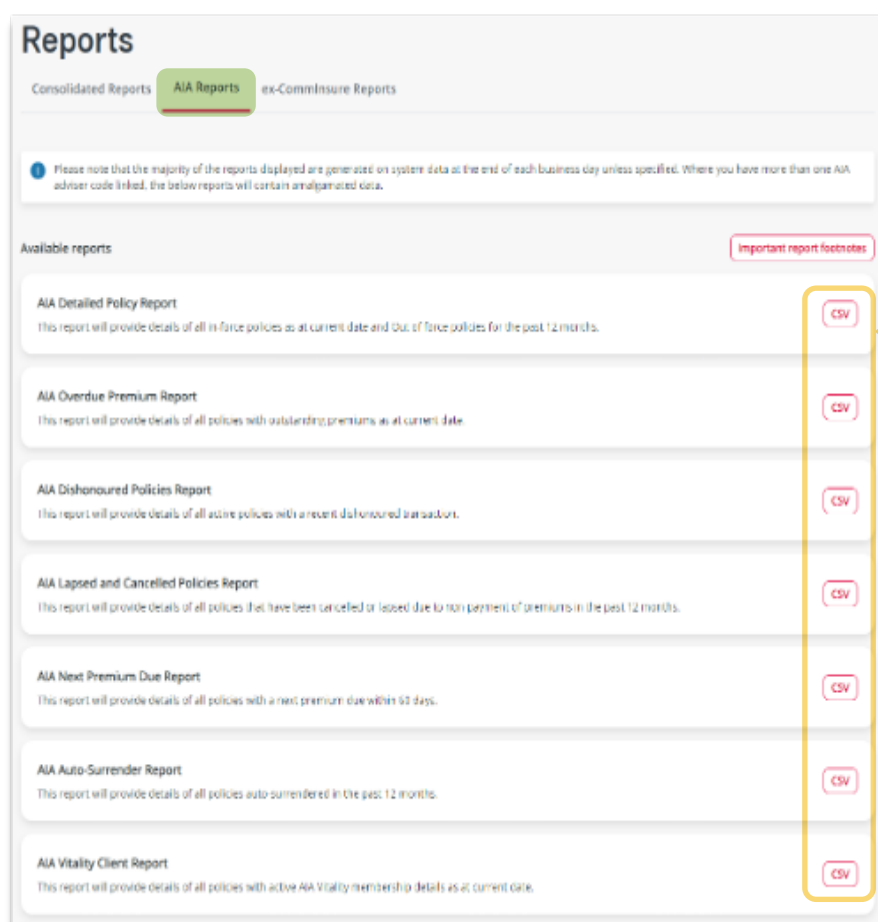
In the Consolidated Reports tab, there is currently one report that is available:



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

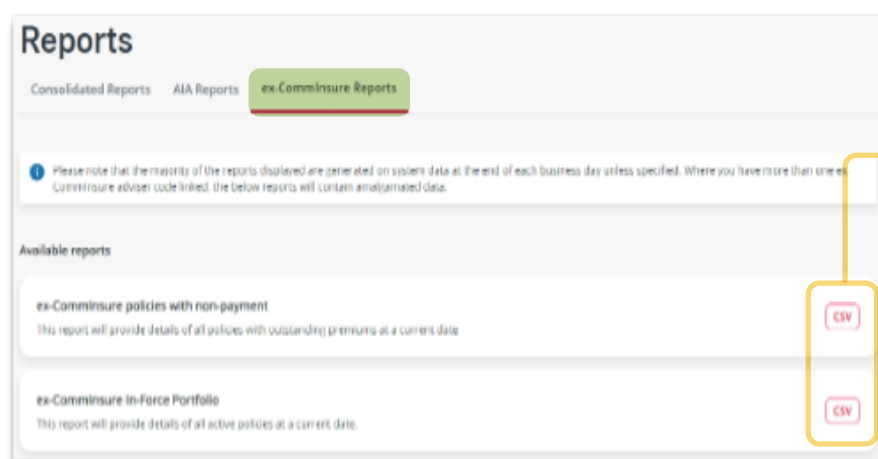
8.1.2 AIA Reports



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:

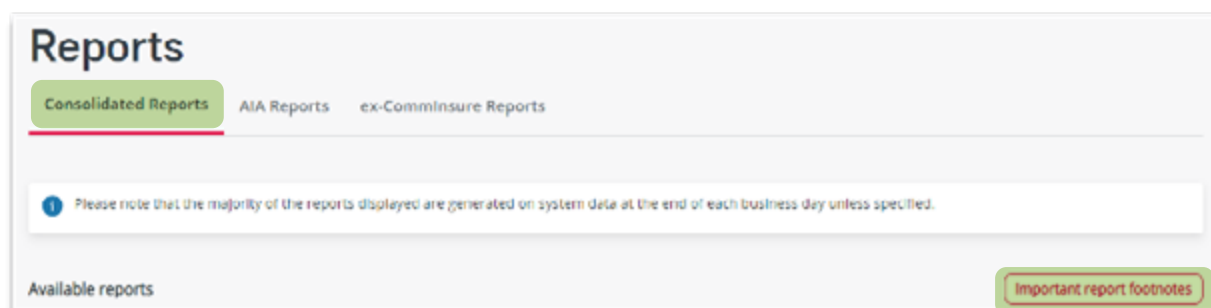
- 1 **ex-CommInsure policies with non-payment**
- 2 **ex-CommInsure In-Force Portfolio**

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

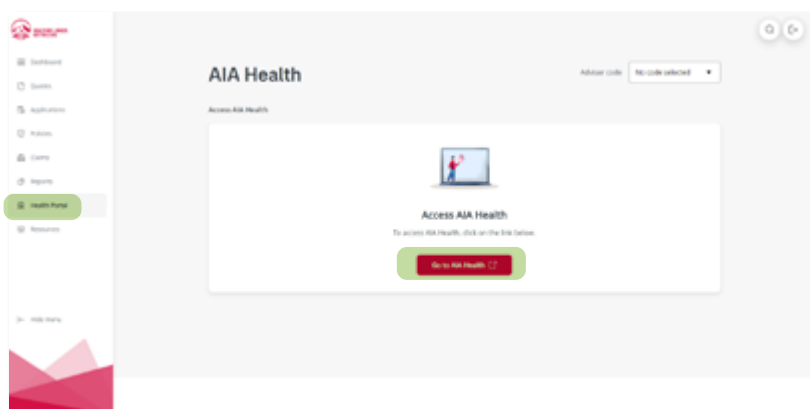
Commission statements are downloadable based on an individual adviser code only. To select the adviser code to generate the commission statement, select the relevant code from the top right-hand corner of the screen. Commission statements will only be stored on the adviser portal for 6 months, anything 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. Adviser Health Portal

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

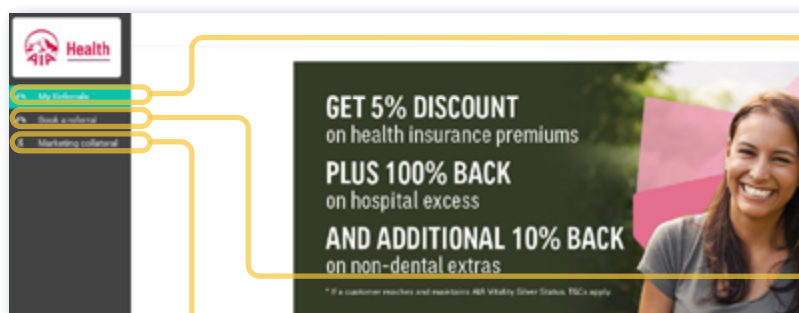


Select your adviser code and click the 'Go to Health Portal' button.



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.

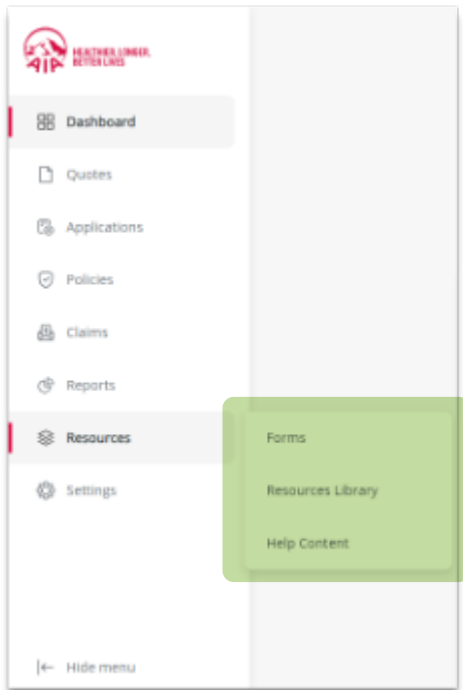
2 Book a Referral

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. Resources



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

10.1 Forms

Name	Type
Application Form	Applications
Application Form - Section W AIA Super Scheme Z	Applications
Tele Application Data Collection Form	Applications
Cancel & Replace Application Form	Applications
Cancel & Replace Application Form - CommInsure	Applications
Nomination of Beneficiaries Super Scheme	Beneficiary Details
Nomination of Beneficiary Form - Nan Superannuation	Beneficiary Details

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

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

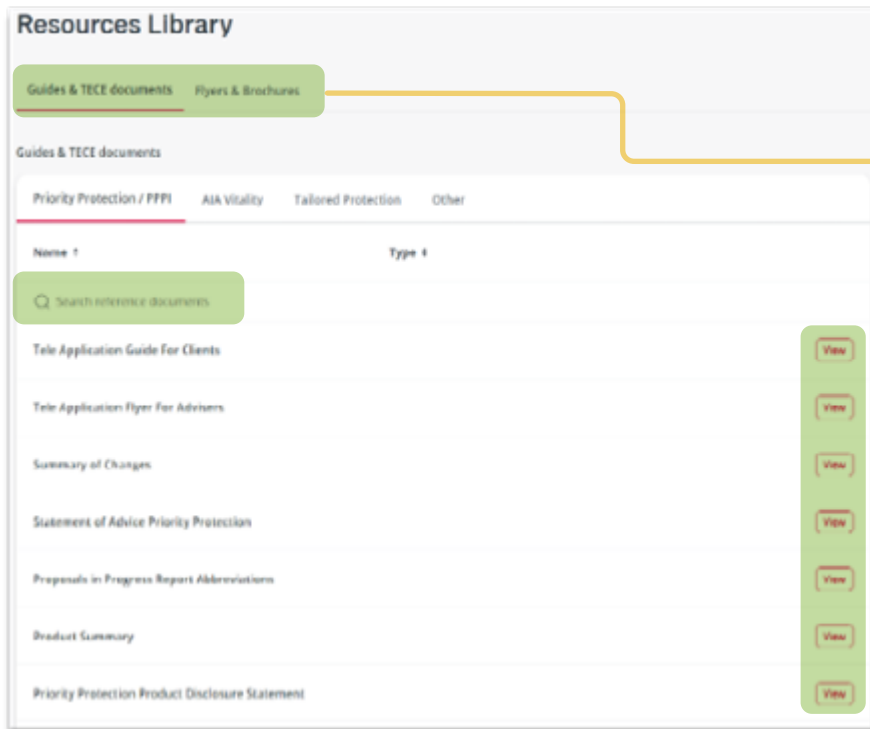
Within each section, you can view the forms available for Priority Protection (AIA), PP for Platform Investors and Tailored Protection (ex-CommInsure).

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.

10.2 Resources Library



The resources library is separated into 2 sections:

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

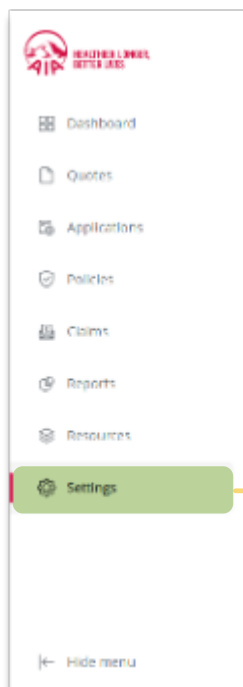
Within each section, you can view the resources available for Priority Protection/ PPI (AIA), AIA Vitality, Tailored Protection (ex-CommInsure) or Other.

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.

11. 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**

Settings

Profile User Management Adviser Codes Datafeed Email Preferences

11.1 Profile

Settings

Profile User Management Adviser Codes Datafeed Email Preferences

Contact details

BIT Gates

User name aia200000012@gettrada.com **EDIT**

Mobile phone number 0418555355 **EDIT**

Business phone number 0398881111 **EDIT**

Preferred email address for correspondence

Email address aia200000012@gettrada.com **EDIT**

Adviser details

ASIC Authorised Representative number 0355555527 **EDIT**

Addresses

Business address 1111th ASHTONFIELD NSW 2323 **EDIT**

Postal address 1111th ASHTONFIELD 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

11.2 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
shredthe.s.privatelo	shredthe.s.privatelo@aia.com	Delegated
qqq mmmw	qqq@s.com	Pending

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.

11.2.1 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

1 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:

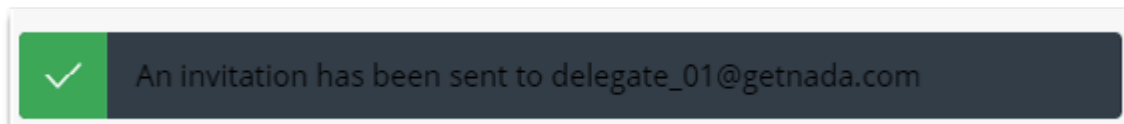
a) needs to have access to the portal for the purpose of performing acts on your behalf and at your specific instruction (Purpose); and

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

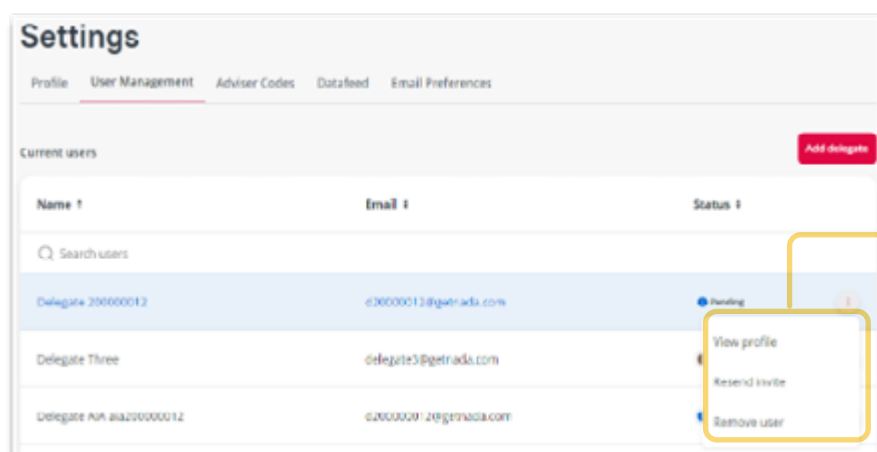
Back **Continue**

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



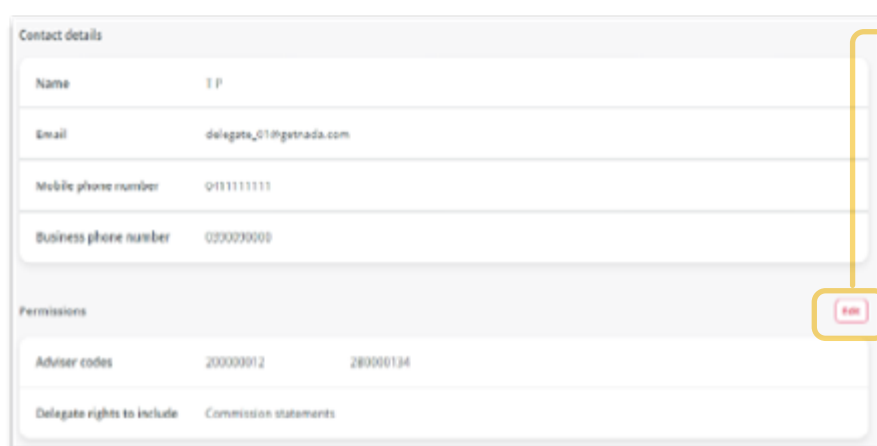
Delegate users will need to activate their account via the email link sent.

11.2.2 View delegate user profile



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

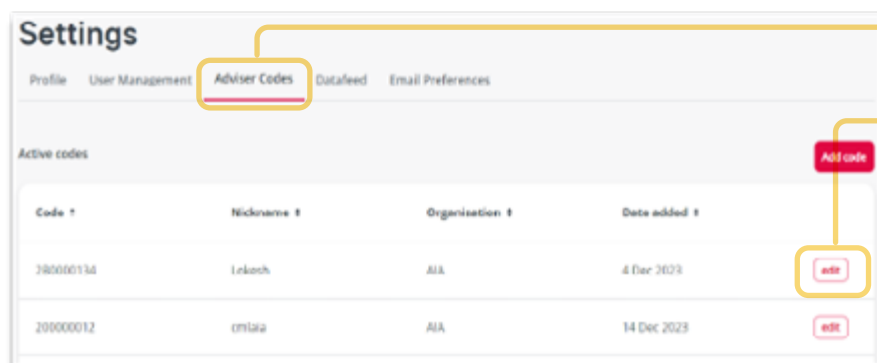
- 1 **View profile**
- 2 **Resend invite** (for newly added delegate users that have not activated their account)
- 3 **Remove user**



View delegate profile:

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

11.3 Adviser codes

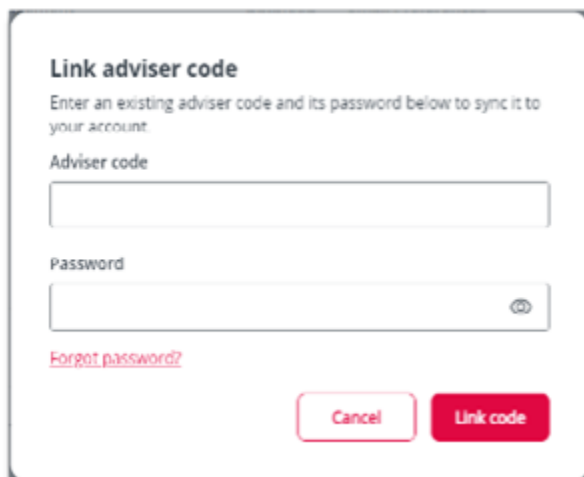


To view, edit or add adviser codes to your profile, click on the **Adviser Codes** tab.

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.

11.3.1 Add adviser code



Link adviser code

Enter an existing adviser code and its password below to sync it to your account.

Adviser code

Password

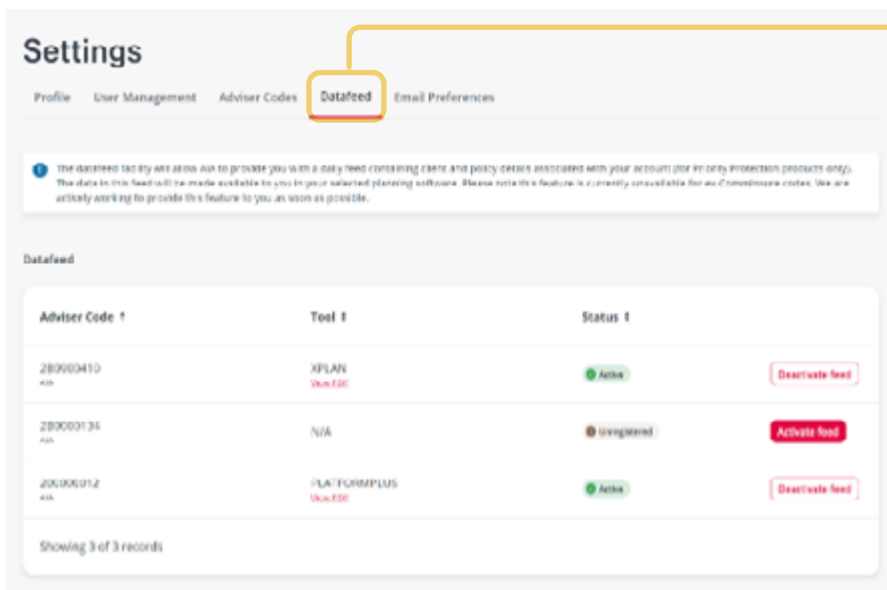
[Forgot password?](#)

Cancel Link 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.

11.4 Datafeed

11.4.1 Activate datafeed



Settings

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

The datafeed tool by AIA Adviser Link to provide you with a daily feed containing client and policy details associated with your account (for Privacy Protection products only). The data in this feed will be made available to you in your selected planning software. Please note this feature is currently unavailable for ex-CommInsure codes. We are actively working to provide this feature to you as soon as possible.

Datafeed

Adviser Code 1	Tool 1	Status 1	
280000410 <small>ex</small>	XPLAN <small>Don EDC</small>	Active	<button>Deactivate feed</button>
280000134 <small>ex</small>	N/A	Unregistered	<button>Activate feed</button>
200000012 <small>ex</small>	PLATFORMPLUS <small>Don EDC</small>	Active	<button>Deactivate feed</button>

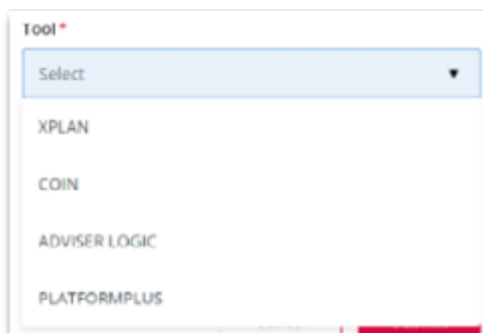
Showing 3 of 3 records

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.

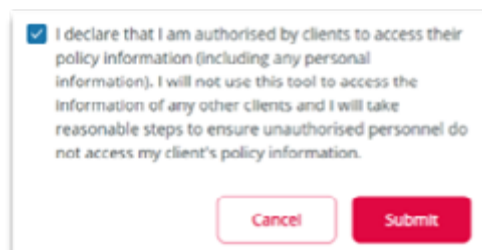
Select from the list of tools available, click on the declaration box and click submit to activate the datafeed.



Tool *

Select ▼

- XPLAN
- COIN
- ADVISER LOGIC
- PLATFORMPLUS

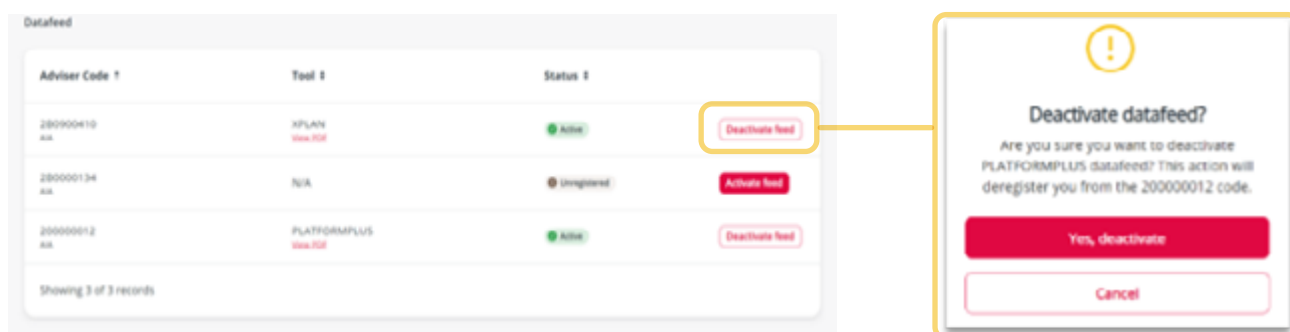


☒ I declare that I am authorised by clients to access their policy information (including any personal information). I will not use this tool to access the information of any other clients and I will take reasonable steps to ensure unauthorised personnel do not access my client's policy information.

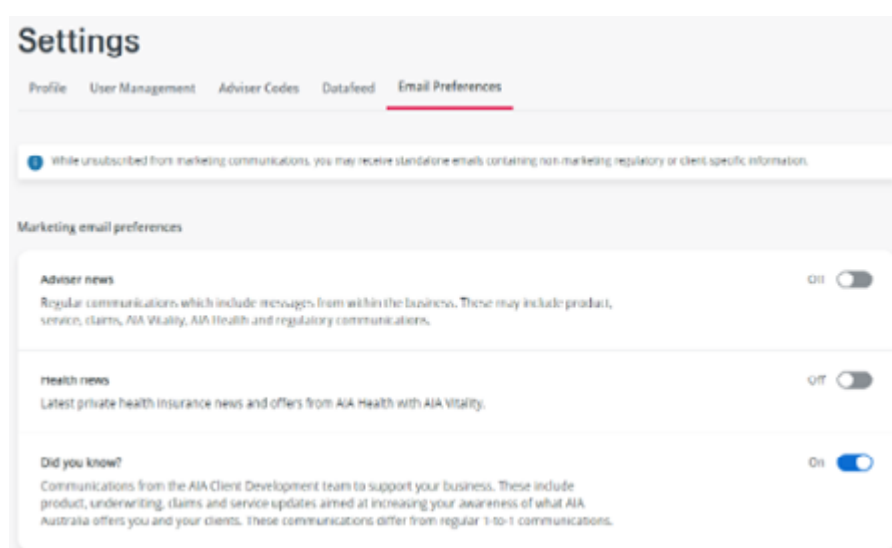
Cancel Submit

11.4.2 Deactivate datafeed

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



11.5 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.

12. Further Support

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

Email: newadviserportal@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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