



AIA Health Adviser Health Portal 'How to Guide'

August 2021



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What is the Adviser Health Portal?

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



Benefits to you

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



How clients can benefit from the referral

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

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




How can AIA Health help you achieve your business goals?

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



Log in

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



AIA Health
with AIA Vitality

Username

Login Type

Adviser

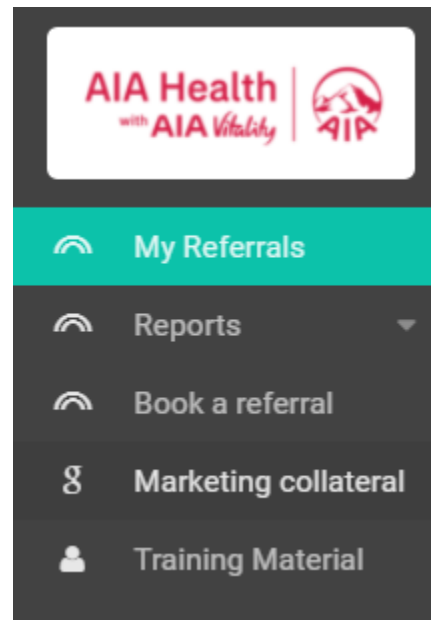
Login



Features & Navigation Tabs

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

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



My Referrals Features

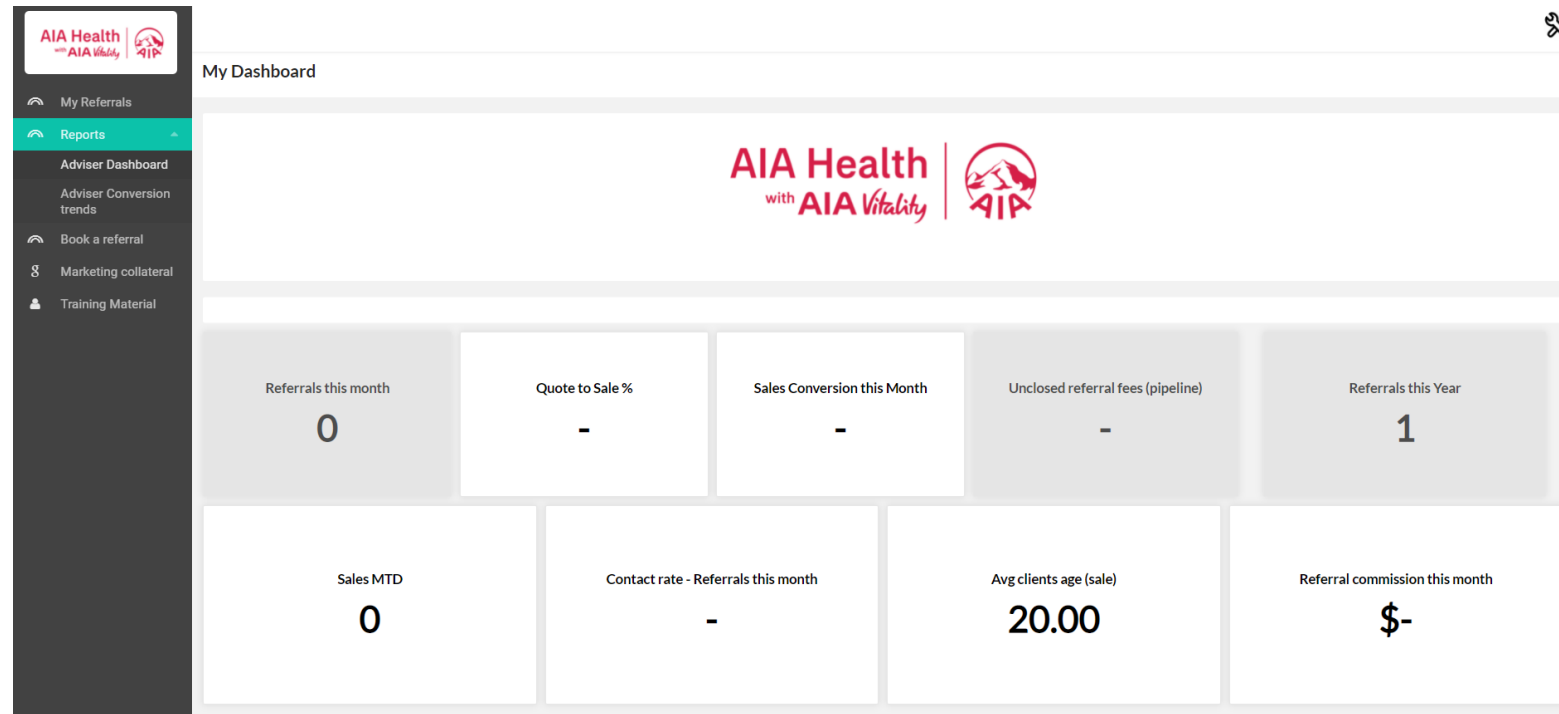
You now have complete transparency across your AIA Health referrals. You will note the Health Portal showcases your client's details, the progress of the referral, and the estimated referral fee. You also can extract your information using the download function. Note that the Portal can take up to 15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

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



Reporting Feature

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



Booking a Referral Feature

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

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

The screenshot shows the 'Book your appointment' page in the AIA Health Insurance Adviser Health Portal. The page has a dark sidebar on the left with navigation options: My Referrals, Reports, Book a referral (highlighted), Marketing collateral, and Training Material. The main content area features the AIA Health Insurance logo and navigation tabs: Home, Cancel Booking, and Reschedule Booking. Below the tabs, there is a 'Book your appointment' section with a dropdown menu for 'Select customer timezone' set to 'Melbourne Australia' and a 'From Date' field set to 'Friday, 23 April 2021'. A red 'Search >' button is located to the right of the date field. Below this, there are two grids of available appointment times. The first grid is for 'Friday, 23 April 2021' and shows times from 12:45PM to 7:30PM. The second grid is for 'Monday, 26 April 2021' and shows times from 9:15AM to 7:30PM.

The screenshot shows the 'Adviser Details' form in the AIA Health Insurance Adviser Health Portal. The form contains the following fields:

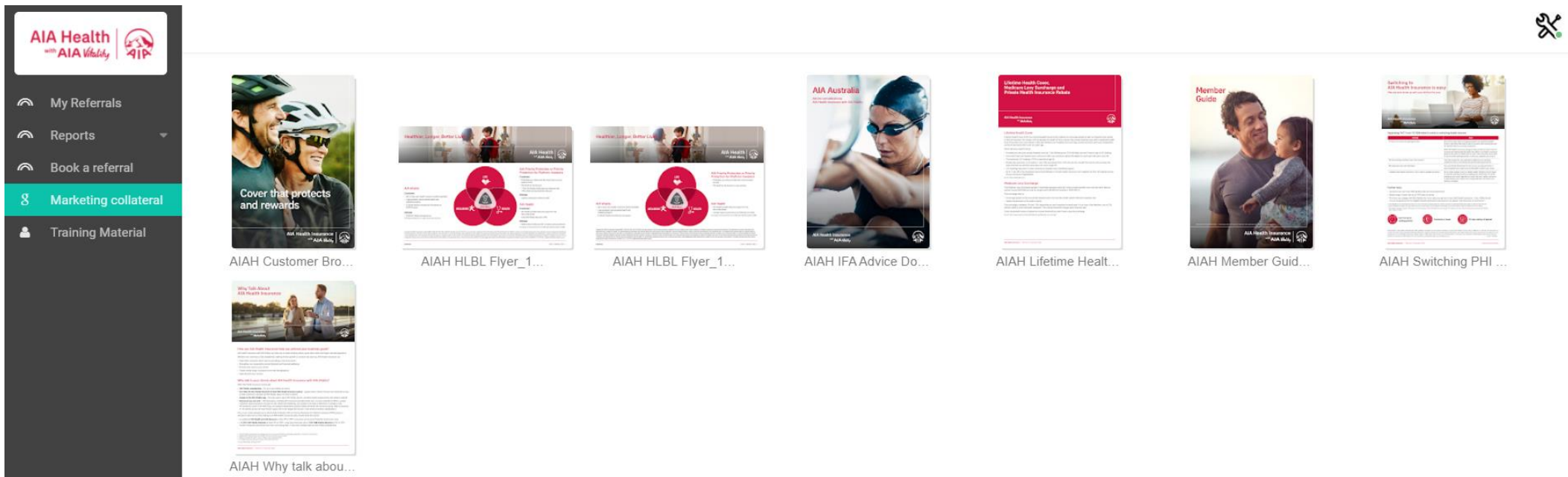
- Adviser Name *
- AFSL Name *
- AIA Adviser Code *
- Adviser Email *
- Adviser Mobile
- Adviser State *
- Is the client an AIA Priority Protection holder?
- Additional Notes?

At the bottom of the form, there are two buttons: '< Back' and 'Confirm >'.



Marketing Collateral/Content

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



The screenshot shows the AIA Health Adviser Portal interface. On the left is a dark sidebar with the AIA Health logo and navigation options: My Referrals, Reports, Book a referral, Marketing collateral (highlighted in teal), and Training Material. The main content area displays a grid of marketing collateral items:

- AIAH Customer Bro... (Cover that protects and rewards)
- AIAH HLBL Flyer_1...
- AIAH HLBL Flyer_1...
- AIAH IFA Advice Do...
- AIAH Lifetime Healt...
- AIAH Member Guid...
- AIAH Switching PHI ...
- AIAH Why talk abou...




Training Material

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



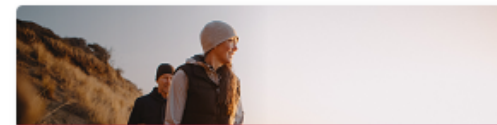
AIA Health - Module 1: Government Legislation
Status: *Completed*
Percent Completed: 100%

Start the module




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

Start the module




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

Start the module



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

Start the module



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

Start the module

eApp
AIA Health Insurance Indicative Quote

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

Start the module



Password Reset & Account Activation

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

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

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

Adviser Login

Please enter your User Name and Password to login.

User Name

Password

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

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

Lost Your Password?

Enter your username below, then click Continue.

User Name

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



AIA Health is a different kind of health insurance

Join AIA Health by 31 July on an eligible policy and get an e-gift card up to \$400#

Health insurance should protect you when things go wrong. It should also help you live a healthier life, every day. That's why all AIA Health policies come with access to [AIA Vitality](#), the personalised, science-backed health and wellbeing program that supports you every day to make healthier lifestyle choices. It provides the tools and support needed to improve your health by encouraging you to do your relevant health checks, move more and eat well - and offers great incentives to motivate you for doing so, like up to \$500 in vouchers to spend at popular retailers each membership year!

The more your clients engage with AIA Vitality, the more health insurance benefits they'll unlock, such as:

- a comprehensive range of Hospital cover options and up to 70% back on Extras*,
- increased benefits when you reach and maintain AIA Vitality Silver status, like an additional 10% back on your extras (up to annual limits) and 100% refund on hospital excess^,
- and no-gap Dental through our dental network provider [smile.com.au](#) – with over 2,000 approved dentists around Australia.

In addition, when your customer takes out an AIA Health with AIA Vitality policy they can unlock more benefits and further discounts across their life and health insurance, including:

- 5% Health and Life discount on their AIA Priority Protection Lump Sum and Income Protection benefits.^
- 5% Health insurance premium discount when your customer first joins and held as long as they maintain AIA Vitality Silver status or above.
- Your customers AIA Vitality contribution fee is waived on their Priority Protection policy.
- 12.5%* AIA Vitality discount on their PP or PPPI Lump Sum premiums and a 7.5%* AIA Vitality discount on PP or PPPI Income Protection premiums from their next billing date if they don't already have an AIA Vitality membership.

*Up to annual limits.

^Additional 10% benefit is available on non-dental Extras only. Excess Refund benefit is available on any Hospital cover when you reach and maintain AIA Vitality Silver Status or higher and have held your policy for at least six months. Conditions and exclusions apply.

^^For eligible Priority Protection policies purchased through a Financial Adviser only. For more information and full details relating to eligibility, please contact us. **May be increased from time to time to reflect current campaign offers, applicable to eligible policies through a Financial Adviser only.

#This new member offer is available to new members to AIA Health with AIA Vitality, who purchase an eligible policy (excluding Silver Plus Hospital Ultimate product variants) between 1 July and 31 July and have not held a private health insurance policy issued by AIA Health or myOwn health insurance within 2 months prior to 30 June 2021. The Offer is not available with any other AIA Health Insurance promotional join offer. Policies that are cancelled, terminated or suspended within the first three months of continuous membership will be ineligible for this offer. Your e-Gift card will be based on your AIA Health Insurance product and membership type at the end of three months of continuous membership. View the full offer terms and conditions and refer to the e-Gift card values table for full information about e-Gift card values.





HEALTHIER, LONGER,
BETTER LIVES

Thank you

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