



ADVISER HEALTH PORTAL USER GUIDE

October 2024

The Adviser Health Portal provides you with a seamless referral process, with greater transparency on client 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. Overview

You can access the 'Health Portal' on the main dashboard of the <u>New Adviser Portal</u>.

REALINER LONGE	Welcome Ben		Adviser code No code sele	cted 🔻
B Dashboard Quotes K. Anolications	New \$500 AIA VItality Silver Status Reward You and your client receive \$500, if your client achieves silver state months. T&LS apply, Available to New PP & AIA Vitality members.	us within 6		
Policies A claims	Do you receive our monthly Adviser News? Keep up to date with the latest product and technical antides and Check your subscription details in the Setting-V#mail Preferences	updates. .ab.		
() Reports	Applications	Retention		
Resources	O With underwriting for assessment	O Upcoming anniversaries		→
	Outstanding requirements	O Overdue premium		\rightarrow
	O	O Dishonoured payments		\rightarrow
← Hide menu	O	O Lapsed policies		\rightarrow
	O Applications expiring soon	O Cancelled policies		\rightarrow

Access is now easier with a single sign-on, meaning you can access both the Adviser Health Portal and the New Adviser Portal with the same login.

The Adviser Health Portal continues to provide a seamless referral process, giving you greater transparency on your client outcomes.



2. Navigation Tabs

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Access the Adviser Health Portal via the **Health Portal** tab on the New Adviser Portal main dashboard.

HEALTHIER LONGER, RETTER LIVES	Welcome Ben			Adviser code	No code selected	•
B Dashboard						
D Quotes	You and your client receive \$500, if your clie months. T&Cs apply. Available to New PP &.	tus Reward ant achieves Silver Status within i AIA Vitality members.	6			
Applications	Do you receive our monthly Ad	hisos Nous?				
Policies	Keep up to date with the latest product and	rechnical articles and updates.				
B Claims						
🖗 Reports	Applications		Retention			
ම Health Portal						
Resources	U With underwriting for assessment	→	U Upcoming anniversaries			→
	O Outstanding requirements	<i>→</i>	0 Overdue premium			→
	0 Ready to include	\rightarrow	0 Dishonoured payments			→
	ready to raide					
• Hide menu	0 Recently issued	÷	0 Lapsed policies			→

2 Select your Adviser Code and click **Go to Health Portal**. A new window will pop up, signing you into the Adviser Health Portal.

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88 Dashboard	AIA Health	Adviser code No code selected 🔻	
C Quotes	AIA Health		
Co Applications	Access AIA Health		
Policies			
A Claims			
@ Reports	Health		
Health Portal			
Resources	Access AIA Health Adviser Portal You are logging in to the AIA Health Adviser Portal Cancel Go to Health portal		
4- Hide menu			
		<u>_</u>	



My Referrals - Find and download your client's details, follow the progress of your referrals, and view the estimated referral fee. The portal can take up to 15 minutes to refresh, so allow time after submitting your referral.

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 the booking and reference number will be provided to your client and yourself via SMS/email.

Cancel/Reschedule - You can reschedule or cancel existing appointments by entering the booking reference number and following the prompts.

Marketing Collateral - Access up-to-date promotional material and campaign information.



If you have any questions, please contact your AIA Australia Client Development Manager.