



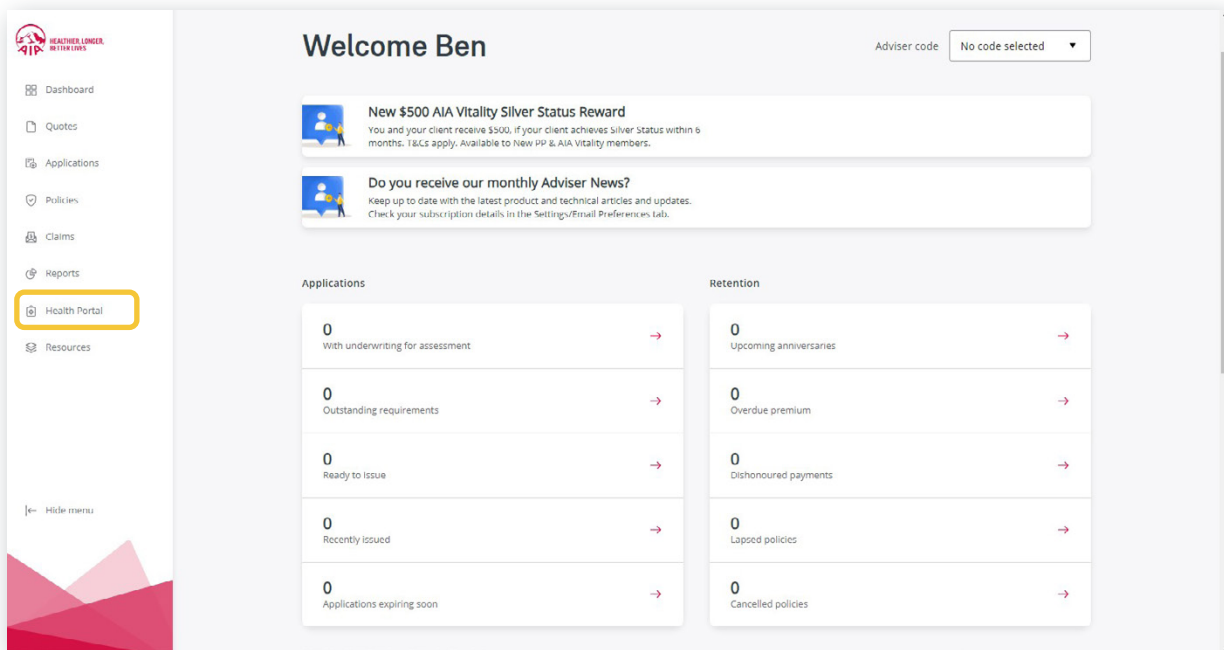
ADVISER HEALTH PORTAL USER GUIDE

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 [New Adviser Portal](#).



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.

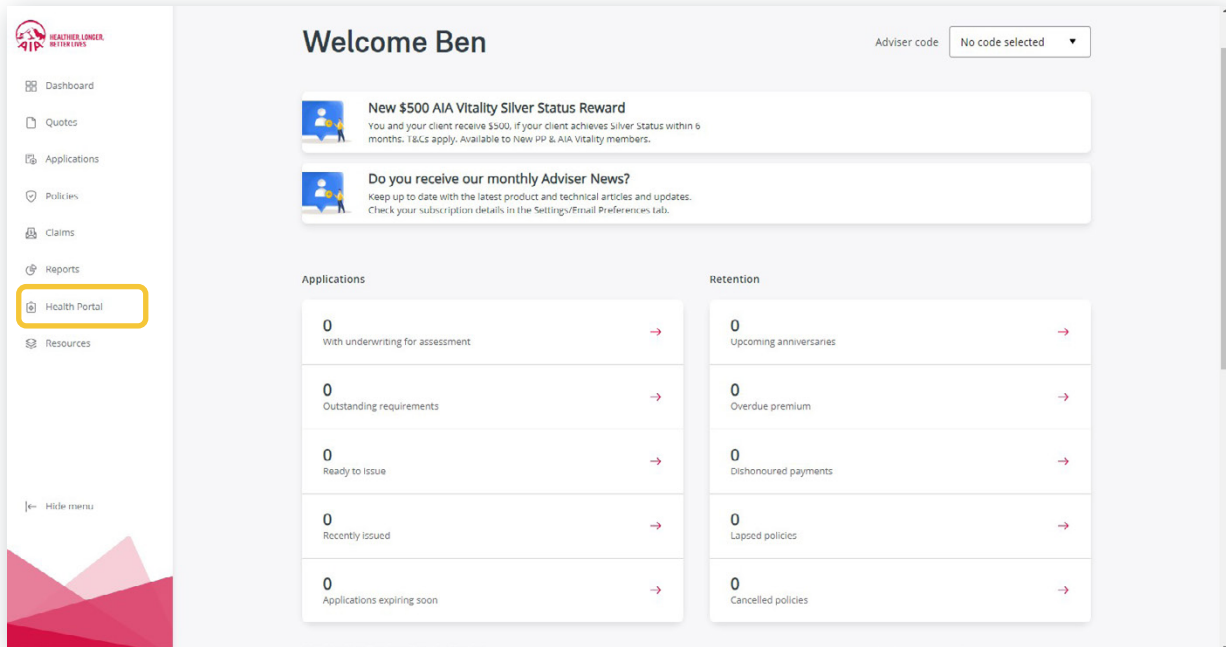
The Adviser Health Portal continues to provide a seamless referral process, giving you greater transparency on your client outcomes.



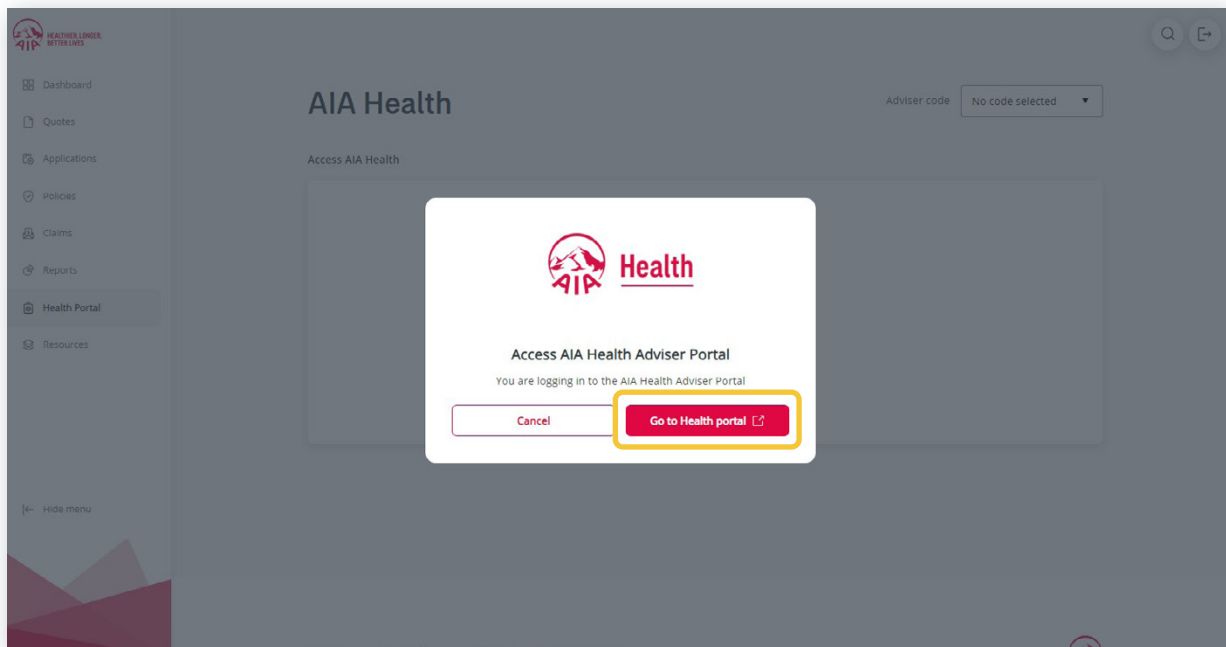
Further information on accessing the New Adviser Portal is on the [Business Growth Hub](#).

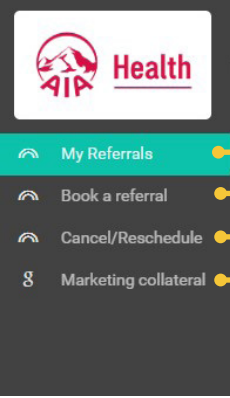
2. Navigation Tabs

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



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





The screenshot shows the AIA Health portal navigation menu. The menu items are: My Referrals (highlighted in teal), Book a referral, Cancel/Reschedule, and Marketing collateral. Numbered callouts 3 through 6 point to these items respectively.

3 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.

4 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.

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

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



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