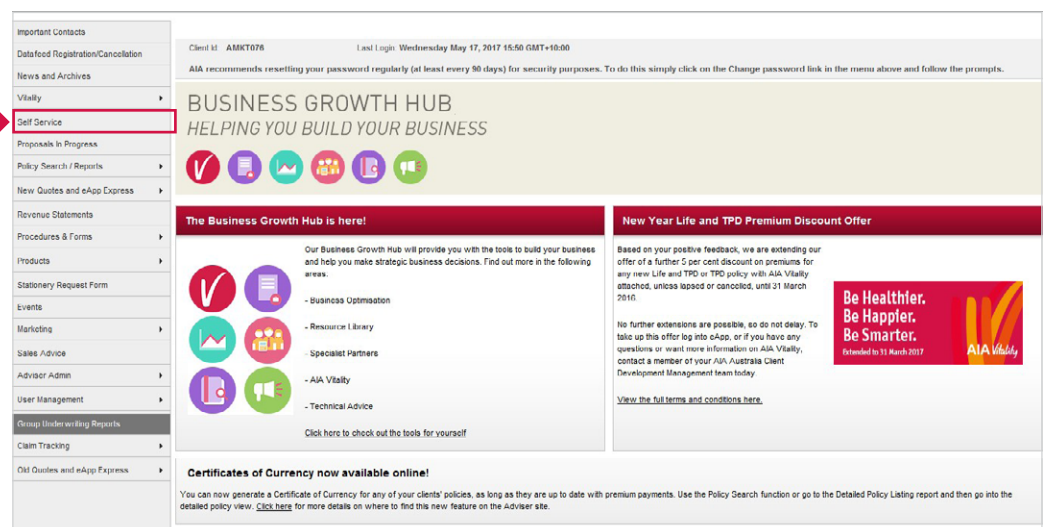


What will be covered in this guide?

- Logging-in
- Basic navigation
- Logging-out
- Finding Help?

Logging-in

1. Log in to the secure AIA Australia Adviser Site
2. Select the Self Service menu to access policy information and to create a claim



Important Contacts
Datafeed Registration/Cancellation
News and Archives
Vitality
Self Service
Proposals in Progress
Policy Search / Reports
New Quotes and eApp Express
Revenue Statements
Procedures & Forms
Products
Stationery Request Form
Events
Marketing
Sales Advice
Adviser Admin
User Management
Group Underwriting Reports
Claim Tracking
Old Quotes and eApp Express

Client ID: AMKT076 Last login: Wednesday May 17, 2017 15:50 GMT+10:00
AIA recommends resetting your password regularly (at least every 90 days) for security purposes. To do this simply click on the Change password link in the menu above and follow the prompts.

BUSINESS GROWTH HUB

HELPING YOU BUILD YOUR BUSINESS

The Business Growth Hub is here!

Our Business Growth Hub will provide you with the tools to build your business and help you make strategic business decisions. Find out more in the following areas:

- Business Optimisation
- Resource Library
- Specialist Partners
- AIA Vitality
- Technical Advice

Click here to check out the tools for yourself

New Year Life and TPD Premium Discount Offer

Based on your positive feedback, we are extending our offer of a further 5 per cent discount on premiums for any new Life and TPD or TPD or TPD policy with AIA Vitality attached, unless lapsed or cancelled, until 31 March 2018.

No further extensions are possible, so do not delay. To take up this offer log into eApp, or if you have any questions or want more information on AIA Vitality, contact a member of your AIA Australia Client Development Management team today.

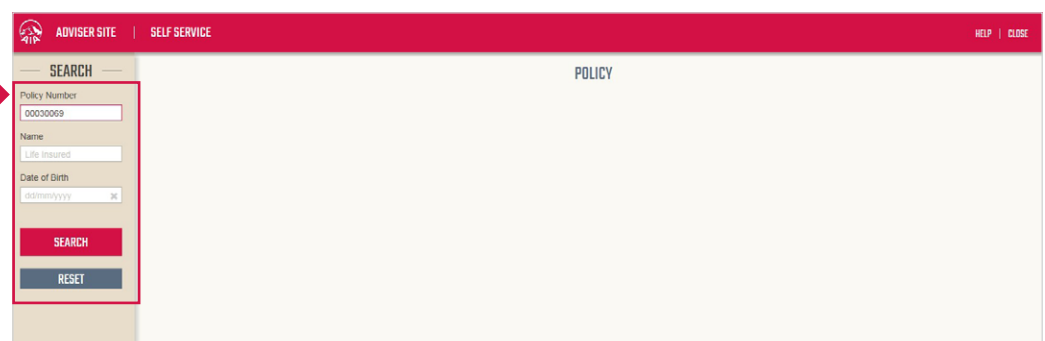
View the full terms and conditions here.

Be Healthier. Be Happier. Be Smarter. Extended to 31 March 2017. AIA Vitality

Certificates of Currency now available online!

You can now generate a Certificate of Currency for any of your clients' policies, as long as they are up to date with premium payments. Use the Policy Search function or go to the Detailed Policy Listing report and then go into the detailed policy view. [Click here](#) for more details on where to find this new feature on the Adviser site.

3. Use the Search panel on the left side of the screen
4. Enter the Policy No. OR Name and Date of Birth of the Life Insured
5. Click Search



ADVISER SITE | SELF SERVICE

SEARCH

Policy Number
00000009

Name
Life Insured

Date of Birth
dd/mm/yyyy

SEARCH

RESET

POLICY

6. If searching on the Life Insured's Name and Date of Birth – a list of Policies will be returned

7. Select the correct Life Insured person by clicking on the Policy No.

8. If searching on the Policy Number – the specific policy will be returned

NOTE: Ensure Life Insured's address is checked prior to creating a new claim – the address information cannot be edited in eClaims once the claim has been lodged

9. Click Update to check and update Client address information

10. Click Create Claim

The screenshot shows the 'POLICY' details for Policy No. 00030069. The interface includes a search bar on the left with fields for Policy Number, Name, and Date of Birth. The main content area displays policy information: Product (INCOME PRO), Status (ACTIVE), Commencement Date (02/05/2017), Insured (BOB CLARKE), Owner (Same as Insured), Current Address (70 MERVILLE ST, SOUTH BRISBANE, QLD, 4101, AUSTRALIA), and Current Bank Account (BSB No. XXXX79, Account No. XXX456). A table lists claims with columns: CLAIM NUMBER, INSURED NAME, CLAIM TYPE, STATUS, and DATE CREATED. The table shows four claims, all for MR BOB CLARKE, with statuses ranging from Lodging to Pending. On the right, there are buttons for 'UPDATE' and 'HISTORY' for each claim, and a 'Create Claim' button at the bottom.

to open eClaims and commence completing the claim

The screenshot shows the 'eClaims' interface for Claim #61247623 - Income Protection. The status is 'Lodging'. The interface includes a navigation menu on the left with options: Claim Summary, Notification and Eligibility, Lodgement, and Supporting Documents. The main content area displays claim details: Insured (MR BOB CLARKE), Policy (Retail), Incident Date (02/02/2016), Claim Event (Heart attack), Policy Number (00030069), Occupation (Project Builder), and Adviser View (Unrestricted). Below this, there are sections for 'Insured Person Details' (Policy Number, Username, Life Insured), 'Life Insured' (Title, Given Name(s), Surname, Date of Birth, Gender), and 'Residential Address' (Address Line 1, Address Line 2, Suburb, State, Postcode, Country, Mobile).

Navigation

1. There is a navigation pane on the left of the screen that can be used to navigate during lodgement of the claim
2. As the claim progresses, more details will be added
3. You will be able to see what steps have been completed and what waiting to be completed

The screenshot shows the eClaims system interface. On the left, a navigation pane is highlighted with a red box, containing links for 'Claim Summary', 'Notification and Eligibility', 'Privacy', 'Eligibility', 'Life Insured Details', 'Claim Contact', 'Claim Details', 'Next Steps', 'Lodgement', 'Claim Lodgement', 'Before You Begin', 'Privacy', and 'Confirm Life Insured Details'. The main content area displays 'Claim (#61247623) - Income Protection' with status 'Lodging'. It includes fields for Insured (MR BOB CLARKE), Policy (Retail), Incident Date (02/02/2016), Claim Event (Heart attack), Policy Number (00030009), Occupation (Project Builder), and Adviser View (Unrestricted). Below this, there are sections for 'Additional Claim Details' and 'Additional Life Insured details' with input fields for Height, Weight, Dominant hand, and Do you smoke?

Logging-out

1. To Logout, click on the Logout link in the top right corner of the screen.

This screenshot is similar to the previous one, but the 'Logout' link in the top right corner of the header is highlighted with a red box. The main content area shows the 'Treatment' section, which includes a table for listing medications taken due to the condition. The table has columns for Medication Name, Date Commenced, Date Completed, and Action. There is also a section for 'What other treatment have you received?' with a text input field.

Finding help

1. For help, click on the Need Help? Link in the top right corner of the screen.

This screenshot is identical to the previous one, but the 'Need Help?' link in the top right corner of the header is highlighted with a red box. The main content area shows the 'Treatment' section, which includes a table for listing medications taken due to the condition. The table has columns for Medication Name, Date Commenced, Date Completed, and Action. There is also a section for 'What other treatment have you received?' with a text input field.