



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

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 policy with AIA Vitality attached, unless lapsed or cancelled, until 31 March 2016.

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.](#)

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: 00030069

Name: Life Insured

Date of Birth: ddmm/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

SEARCH

Policy Number: 00030069

Name: Life Insured

Date of Birth: ddmmyyyy

SEARCH **RESET**

POLICY

NO.00030069

Product: INCOME PRO Status: ACTIVE **SERVICE REQUEST**

Commencement Date: 02/05/2017

Insured: MR BOB CLARKE Insured DOB: 10/07/1986 Owner: Same as Insured

CURRENT ADDRESS
70 MERVALE ST, SOUTH BRISBANE, QLD, 4101, AUSTRALIA

CURRENT BANK ACCOUNT
BBS No: XX3879 Account No: XX3456

Claims

CLAIM NUMBER	INSURED NAME	CLAIM TYPE	STATUS	DATE CREATED
1 61247623	MR BOB CLARKE	Income Protection	Lodging	2017-05-17+10:00
2 61247615	MR BOB CLARKE	Income Protection	Pending	2017-05-17+10:00
3 61246955	MR BOB CLARKE	Income Protection	Notified	2017-05-12+10:00
4 61246922	MR BOB CLARKE	Income Protection	Lodging	2017-05-12+10:00

10. Click Create Claim to open eClaims and commence completing the claim

eClaims

The global date has been overridden for all processes by user 'MRGenFundAdmin' since '3:06 PM 04/05/2017'. The current date value is '3:09 PM 17/05/2017'.

Logged in as *****XXXXXXXXXXXX

Navigation Options

- Claim Summary**
 - Overview
- Notification and Eligibility**
 - Privacy
 - Eligibility
 - Life Insured Details
 - Claim Contact
 - Claim Details
 - Next Steps
- Lodgement**
 - Claim Lodgement
- Supporting Documents**
 - Lodgement Documents
 - Download Forms

Claim (#61247623) - Income Protection Status: Lodging

Insured: MR BOB CLARKE Policy: Retail Incident Date: 02/02/2016

Claim Event: Heart attack Policy Number: 00030069 Lodgement Date:

Occupation: Project Builder Adviser View: Unrestricted

Insured Person Details

Policy Number: 00030069

Username: au.retail.claims@aia.com

Life Insured

Title: MR

Given Name(s): BOB

Surname: CLARKE

Date of Birth: 10/07/1986

Gender: Male Female

Residential Address

Address Line 1: 70 MERVALE ST

Address Line 2:

Suburb: SOUTH BRISBAE

State: QLD

Postcode: 4101

Country: AUSTRALIA

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 interface. On the left is a 'Navigation Options' pane with a red box highlighting the 'Lodgement' section, which includes 'Claim Lodgement', 'Before You Begin', and 'Privacy'. 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 (00030069), Lodgement Date, Occupation (Project Builder), and Adviser View (Unrestricted). Below this are tabs for 'Questions', 'Answers', and 'Review'. The 'Additional Claim Details' section includes 'Additional Life Insured details' with fields for Height (Centimetres), Weight (Kilograms), Dominant hand (Left, Right, Both), and Do you smoke? (Yes, No).

Logging-out

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

This screenshot is identical to the previous one, but with a red box highlighting the 'Logout' link in the top right corner of the page header.

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 ones, but with a red box highlighting the 'Need Help?' link in the top right corner of the page header.