

# Adviser Site Self-Service

Online User Guide



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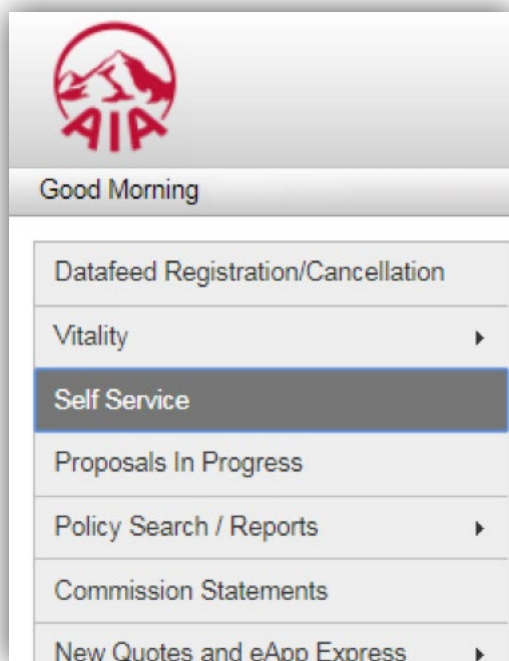
## What is Self-Service?

Self Service is accessed through the Adviser Site and allows Advisers to **view** and **request in-force policy alterations online**. The mobile responsive design means Self-Service can be easily accessed on any device.

Self-Service capability provides Advisers with the convenience to submit alteration requests directly online resulting in **faster processing times**, and the ability to make certain **real time updates** to policy details if they hold an authority on behalf of that client.

## Access to Self Service

A link titled "**Self Service**" has been added to the Adviser Site menu. When you select this link your log-on credentials will be authenticated via Single Sign On.



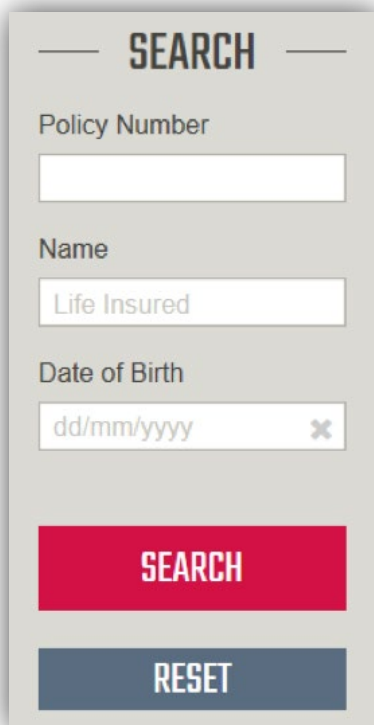
The Self-Service platform has been developed with mobile responsive design. This means you are able to access and easily use Self-Service from your Desktop, Laptop, Tablet or Mobile device.

## Search Functionality

The Search menu is located on the left hand side. Enter information on the Search fields to return a list of matching policies.

You can search by:

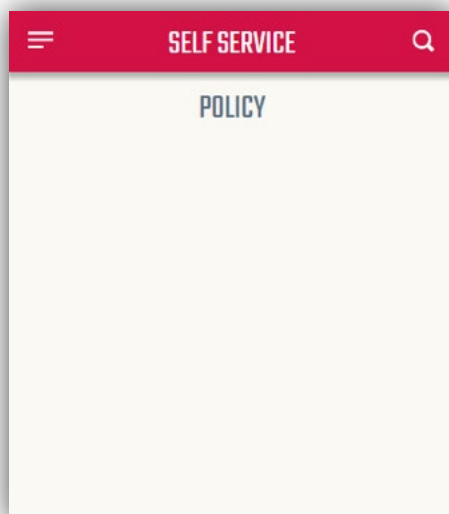
- Policy Number
- Life Insured Name (First name and/or Last name)
- Life Insured Date of Birth



The screenshot shows a search interface with the following elements:

- SEARCH** header
- Policy Number** label above a text input field.
- Name** label above a text input field containing the placeholder text "Life Insured".
- Date of Birth** label above a date input field with the placeholder "dd/mm/yyyy" and a clear (X) button.
- A red **SEARCH** button.
- A dark blue **RESET** button.

In the Mobile/Tablet view, the Search menu is opened using the Search icon on the top right.



The screenshot shows the mobile/tablet interface with the following elements:

- Red header bar with a hamburger menu icon on the left, the text **SELF SERVICE** in the center, and a search icon on the right.
- Below the header, the word **POLICY** is displayed in a large, bold font.

If more than one policy is found, a list of results will be displayed. Select anywhere on the results line to open the policy.

POLICY						
POLICY NO. ▼	INSURED NAME	DOB	PRODUCT	STATUS	COMMENCEMENT DATE	AIA VITALITY
1	JAXXXX NAXXX	07/09/1975	PP13	LAPSED	14/01/2014	
2	DAXXXX PHXX	07/09/1975	PP13	ACTIVE	22/08/2013	
3	ESXXXX ABXXXX	07/09/1975	PP12	DECLINED	07/10/2013	
4	DIXXX D'XXXXX	07/09/1975	PP12	ACTIVE	07/05/2013	<b>AIA Vitality</b>
5	STXXXX RIXXX	07/09/1975	PP13	ACTIVE	10/11/2014	
6	JOXX XXX LEX	07/09/1975	PCFI	ACTIVE	16/04/2007	
7	ERXX WOXX	07/09/1975	PP06	ACTIVE	22/01/2007	
8	PEXXX MAXXXXXX	07/09/1975	PP11	ACTIVE	06/06/2011	
9	DAXXXX PHXX	07/09/1975	PP13	ACTIVE	21/11/2013	
10	PEXXX MAXXXXXX	07/09/1975	PP09	ACTIVE	06/09/2009	
11	LAXXXXXX CHXX	07/09/1975	PPSI	CANCELLED	15/03/2006	
TOTAL:15						

You can change the order of the policies by clicking the column headings

The Search result view is designed to adjust for optimal use on Mobile and Tablet devices. Column sorting is not available on these devices.



## Policy Detail Screen

The Policy Detail screen contains basic information about the policy and provides a list of services you are able to access through Self-Service. The latest information will be displayed underneath each service listed.

The screenshot shows the 'POLICY' detail screen. On the left is a search sidebar with fields for Policy Number, Name, and Date of Birth, and buttons for SEARCH and RESET. The main area displays policy information:

- Product:** LIFE COVER
- Status:** ACTIVE
- Commencement Date:** 18/01/2018
- Insured:** J0XXXXXXXX C0XXXXXXXX, Insured DOB: 05/04/1977
- Current Address:** Residential and Postal addresses in Australia.
- Current Bank Account:** BSB No. and Account No.
- Claims:** Create Claim button.

Action buttons include 'SERVICE REQUEST' (AIA logo), 'UPDATE', and 'HISTORY' for various sections. A close button (X) is in the top right corner.

Select **SERVICE REQUEST** or **UPDATE** to access the service you would like to update.

To return to the Search results, select the Cross **(X)** on the top right corner or press **Esc** key.

**Note:** If you do not have authority from your Client, the **UPDATE** buttons will be disabled. Follow the link displayed on the Policy Detail screen to download a copy of the **Adviser Authority Form**. Once AIA has received a signed copy of this form, you will be able to use the Self-Service functionality.

The warning message box contains the following text:

**You do not have authority to update this policy. Please submit a signed [Adviser Authority form](#). If you believe you have already submitted a signed authority for this client, please contact AIA.**

Product: TERM LIFE                      Status: NOT TAKEN  
 Commencement Date: 03/10/2001

## Create a Service Request

The Service Request feature allows you to submit the following service request types for AIA to complete:

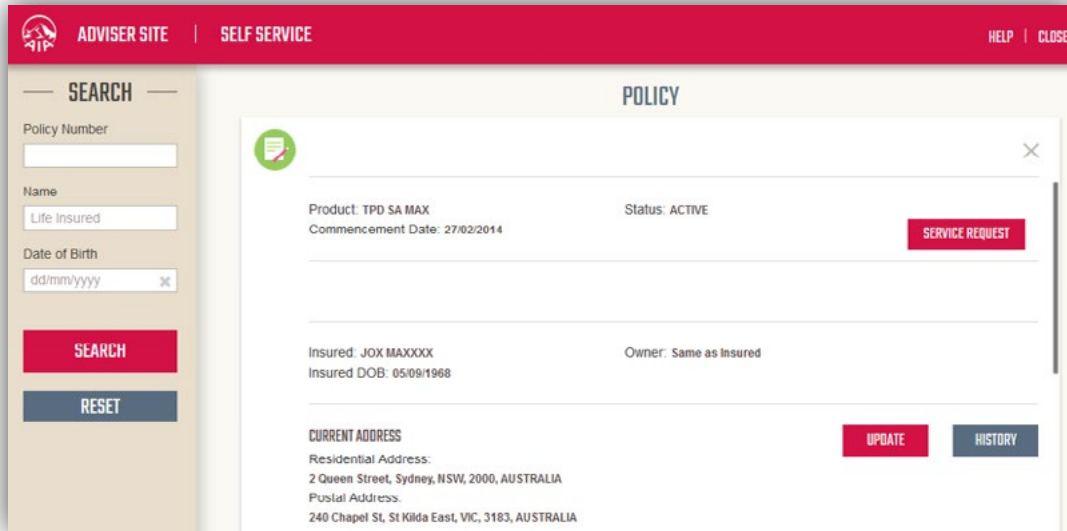
- Change in Payment Frequency
- Change of address
- Change of smoker status
- Decrease in Sum Insured
- Increase in Sum Insured
- Lost policy Document Replacement
- Nomination of Beneficiary
- Policy Cancellation Requests
- Remove CPI
- Stop Debit
- Supplementary Application for V
- AIA Super – Change in Payment Frequency
- AIA Super – Decrease in Sum Insured
- AIA Super – Increase in Sum Insured
- AIA Super - Lost policy Document Replacement
- AIA Super - Nomination of Beneficiary
- AIA Super - Policy Cancellation Request
- AIA Super – Remove CPI
- AIA Super – Rollover Benefit Statement



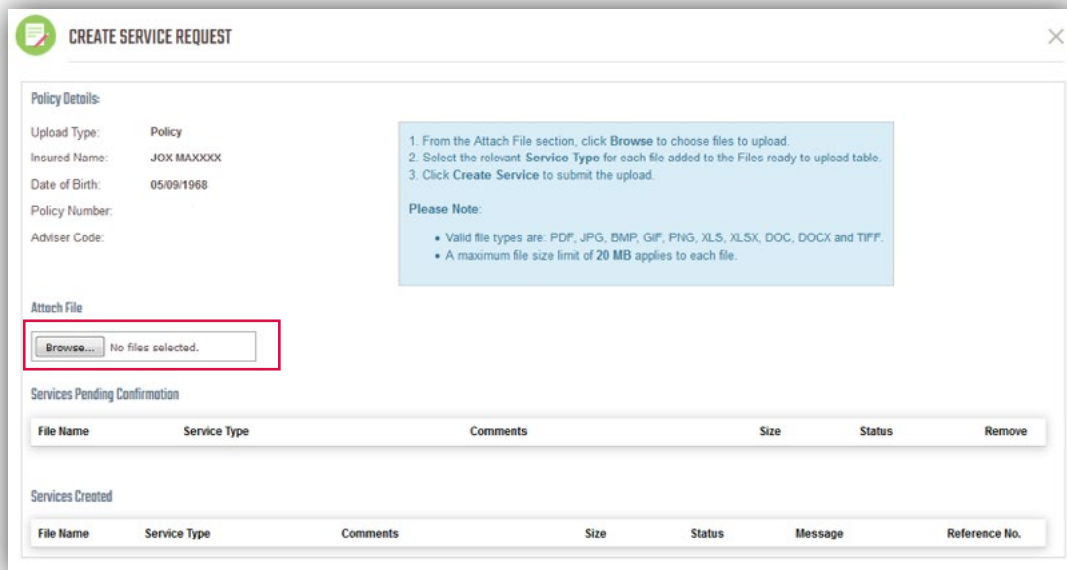
### DID YOU KNOW?

Submitting your request using a **Service Request** in Self Service will ensure your **request reaches us sooner** and is **processed faster** than if you were to submit via standard email or mail options.

Select **SERVICE REQUEST** to start a new task.

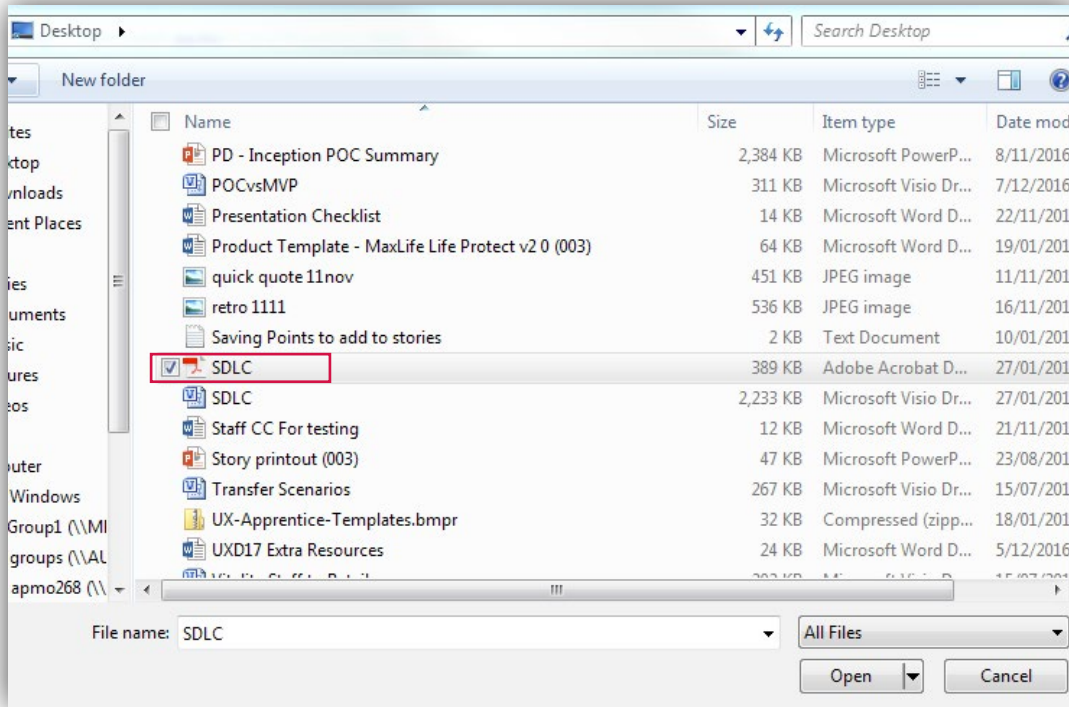


The Create Service Request screen will appear. All currently available service types require supporting documentation. Click **BROWSE** to select the document you want to upload.

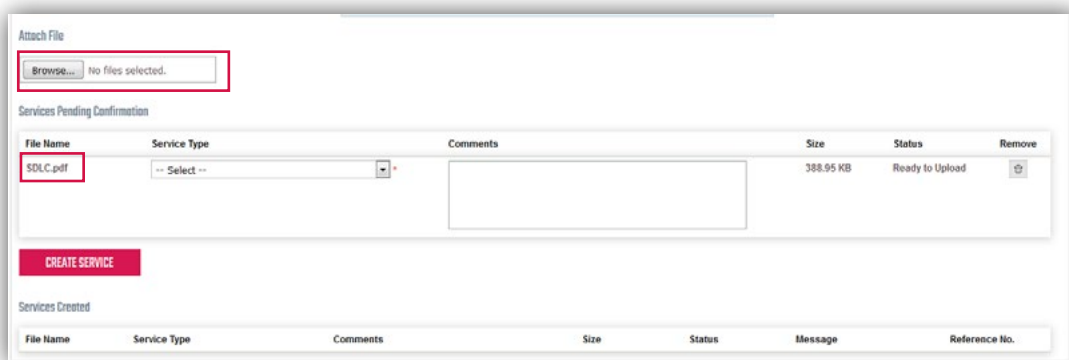




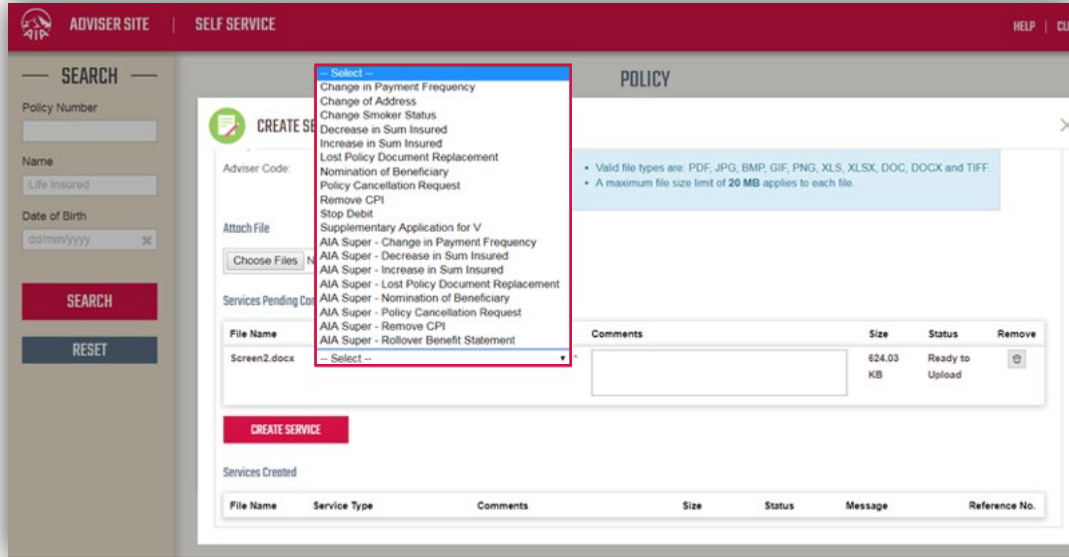
Select the document you want to upload.



The selected document will appear in the **Services Pending Confirmation** section.



Select the **Service Type** associated with the document from the drop down menu and click **CREATE SERVICE**.



Upon successful upload, the document will be listed under **Services Created** with status **Uploaded Successfully**.

File Name	Service Type	Comments	Size	Status	Message	Reference No.
SDLC.pdf	Lost Policy Document Replacement		388.95 KB	Uploaded Successfully		148592125451

## Change of Address

The current residential address details of the Client are displayed on the Policy Detail screen. Select **UPDATE** to open the Change of Address screen.

Insured: JAXXXXX NAXXX Insured DOB: 07/09/1975	Owner: Same as Insured
<hr/>	
<b>CURRENT ADDRESS</b> 549 St Kilda Rd, Melbourne, VIC, 3004, AUSTRALIA	<input type="button" value="UPDATE"/> <input type="button" value="HISTORY"/>

Separate addresses will be displayed if the Life Insured and Policy Owner are different people.

Insured: Insured DOB: 07/03/1976	Owner: EVXX XXXXXXX X XXXXXXX XXXXXX
<hr/>	
<b>CURRENT INSURED ADDRESS</b> 19XXXXXXXX XXXXXXX XXXXXX, Melbourne, VIC, 3000, AUSTRALIA	<input type="button" value="UPDATE"/> <input type="button" value="HISTORY"/>
<hr/>	
<b>CURRENT OWNER'S ADDRESS</b> 549 St Kilda Rd, Melbourne, VIC, 3004, AUSTRALIA	<input type="button" value="UPDATE"/> <input type="button" value="HISTORY"/>

The address details are pre-populated into the relevant fields. You can update individual fields or choose to remove all the current address information by selecting **Clear Residential Address**.

The screenshot shows a form titled "CHANGE INSURED ADDRESS" with a close button (X) in the top right corner. The form is divided into "Residential Address" and "Postal Address" sections. The "Residential Address" section contains the following fields:
 

- Country: A dropdown menu with "AUSTRALIA" selected, followed by an asterisk (\*).
- Postcode: A text input field containing "3037", followed by an asterisk (\*).
- State: A dropdown menu with "VIC" selected, followed by an asterisk (\*).
- Suburb / City: A text input field containing "Rcity", followed by an asterisk (\*).
- Address Line 1: A text input field containing "11 XXXXXXXX XXXXXX", followed by an asterisk (\*).
- Address Line 2: An empty text input field.

 The "Postal Address" section contains a checkbox labeled "Same as Residential Address" which is checked. To the right of the Country dropdown, there is a button labeled "Clear Residential Address" which is highlighted with a red rectangular box. At the bottom of the form, there are two buttons: "UPDATE" (red) and "CANCEL" (grey).

When **AUSTRALIA** is selected as the Country, the address fields will be predictive. When you begin typing, address details matching your entry will be suggested to you.

This screenshot shows the same "CHANGE INSURED ADDRESS" form, but with predictive suggestions. The "Country" dropdown remains "AUSTRALIA". The "Postcode" field now contains "3183". The "State" dropdown shows a suggestion: "Balaclava, VIC, 3183". The "Suburb / City" dropdown shows two suggestions: "Ripponlea, VIC, 3183" and "St Kilda East, VIC, 3183". The "Address Line 1" field contains "St Kilda East, VIC, 3183" and has an asterisk (\*). The "Clear Residential Address" button is no longer highlighted. The "UPDATE" and "CANCEL" buttons remain at the bottom.

Selecting a suggested address will populate related fields for you.

**CHANGE INSURED ADDRESS**
✕

**Residential Address**

Country: AUSTRALIA \* [Clear Residential Address](#)

Postcode: 3183 \*

State: VIC \*

Suburb / City: St Kilda East \*

Address Line 1: 180 al \*

Address Line 2: 100 Alma Rd  
St Kilda East, VIC, 3183

Postal Address:  Same as Residential Address

UPDATE
CANCEL

To enter a different Postal address, you can select the **Same as Residential Address** checkbox.

Address Line 1: 180 Alma Rd \*

Address Line 2:

Postal Address:  Same as Residential Address

Country: AUSTRALIA \* [Clear Postal Address](#)

Postcode: 3037 \*

State: VIC \*

Suburb / City: Rcity \*

Address Line 1: 11 XXXXXXXX XXXXXX \*

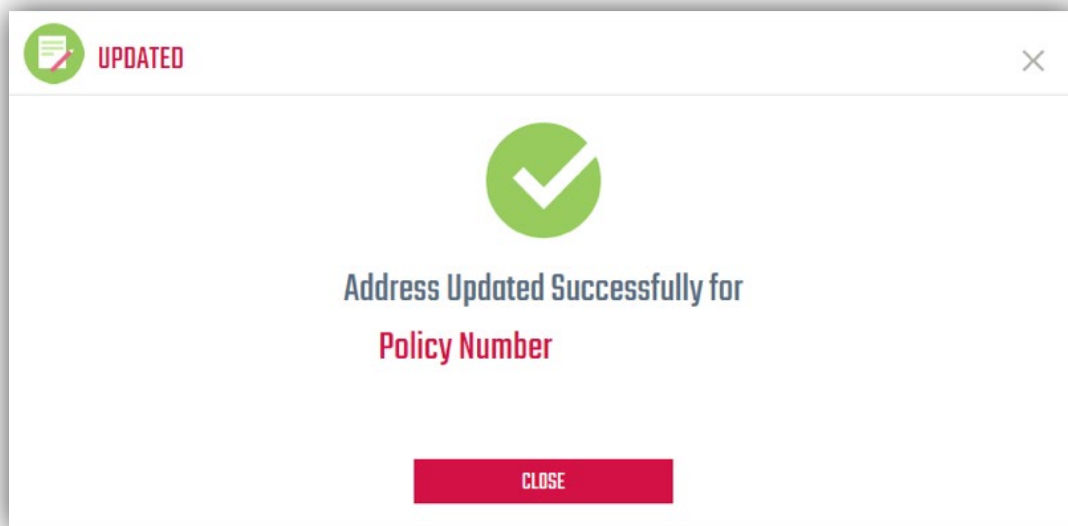
Address Line 2:

UPDATE
CANCEL

Select **UPDATE** when you are ready to submit your changes.

Address Line 1	<input type="text" value="180 Alma Rd"/>	*
Address Line 2	<input type="text"/>	
Postal Address	<input type="checkbox"/> Same as Residential Address	
Country:	<input type="text" value="AUSTRALIA"/>	* <a href="#">Clear Postal Address</a>

You will get a message informing you if the update was a success. Confirm all the required policy numbers for the Client are listed. If there are any policies missing for the Client, please search and update these policies separately.



## Change of Bank

The current bank account payment details of the policy are displayed on the Policy Detail screen. Select **UPDATE** to open the Change of Bank Account screen.

**CURRENT BANK ACCOUNT**

BSB No. XX3034  
Account No. XXXX5673

**UPDATE**
**HISTORY**

If more than one policy exists for the payer of the policy, a policy selection screen will appear with a list of related policies.

**CHOOSE POLICY TO UPDATE**
✕

Select All

**JDX MAXXXX** ▾

BSB NO. XX3034
Account No. XXXX5676

**CM X XX XXXXXX XXXXX XXXX** ▾

BSB NO. XX3009
Account No. XXXXX6789

**NEXT**
**CANCEL**

Select the **drop-down arrow** to view more policy and current bank information.

**CHOOSE POLICY TO UPDATE**
✕

Select All

JDX MAXXXX ▼

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BSB NO. XX3034	Account No. XXXX5676
DOB: <b>05/09/1968</b>	Product: <b>TPD SA MAX</b>
Commencement Date: <b>27/02/2014</b>	Status:

---

**CURRENT BANK INFO**

Account Holder: <b>Marge</b>	Financial Institution: <b>WCBentleigh</b>
Payment Type: <b>Direct Debit</b>	
Payment Frequency: <b>YEARLY</b>	

CM X XX XXXXXX XXXXX XXXX ▼

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BSB NO. XX3009	Account No. XXXXX6789
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You can select one policy at a time to update with different payment details, or you can update several policies at once with the same payment details. When you have chosen the policies you want to update, select **NEXT**.

**CHOOSE POLICY TO UPDATE**
✕

Select All

JDX MAXXXX ▼

---

BSB NO. XX3034	Account No. XXXX5676
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CM X XX XXXXXX XXXXX XXXX ▼

---

BSB NO. XX3009	Account No. XXXXX6789
----------------	-----------------------

NEXT

CANCEL



Certain policies need to be manually processed by AIA. If you wish to update the payment information on one of these policies, please submit the new payment details by contacting AIA.

**CHOOSE POLICY TO UPDATE**

Select All

Policy status does not allow updating payment details.

JAXXXX NAXXX ▾

BSB NO. XX0001      Account No. XXXXXX0000

**NEXT**      **CANCEL**

Enter the **Account Holder name, BSB and Account No.** The Financial Institution will update automatically based on the BSB.

**CHANGE BANK ACCOUNT**

Payment Type: Direct Debit

Payment Options: All Future Premiums

Account Holder:

BSB:

Account No.:

Financial Institution:

**BACK**      **UPDATE**      **CANCEL**

Select **UPDATE** when you are ready to submit your changes. A message will confirm if the update was successful.

## Change of Credit Card

The current credit card account payment details of the policy are displayed on the Policy Detail screen. Select **UPDATE** to open the Change of Credit Card Account screen.

**CURRENT CREDIT CARD ACCOUNT**

Card Name: Jo Citizen

Card Number: 444433\*\*\*\*\*1111

Expiry Date: 05/20

UPDATE
HISTORY

If more than one policy exists for the payer of the policy, a policy selection screen will appear with a list of related policies.

✎
CHOOSE POLICY TO UPDATE
✕

Select All

SHXXXXX MCXXXXXX
▼

---

Card Name: Jo Citizen

Card No.  
444433\*\*\*\*\*1111

Expiry Date: 01/18

TTCSL LIMITED
▼

---

Card Name: Jo Citizen

Card No.  
444433\*\*\*\*\*1111

Expiry Date: 01/18

NEXT
CANCEL

Select the **drop-down arrow** to view more policy and credit card information.

**CHOOSE POLICY TO UPDATE**

Select All

**TTCSL LIMITED** ▾

Card Name: Jo Citizen      Card No. 444433\*\*\*\*\*1111      Expiry Date: 01/18

DOB: [REDACTED]      Product: **LIFE COVER**

Commencement Date: **03/03/2013**      Status: **ACTIVE**

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**CURRENT CREDIT CARD INFO**

Payment Type: **Direct Debit**

Payment Frequency: **MONTHLY**

When you have chosen the policies you want to update, select **NEXT**.

**CHOOSE POLICY TO UPDATE**

Select All

**SHXXXXX MCXXXXX** ▾

Card Name: Jo Citizen      Card No. 444433\*\*\*\*\*1111      Expiry Date: 05/20

DOB: [REDACTED]      Product: **SHXXXXX MCXXXXX**

Commencement Date: **03/03/2013**      Status: **ACTIVE**

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**CURRENT CREDIT CARD INFO**

Payment Type: **Direct Debit**


Payment Frequency: **MONTHLY**

**TTCSL LIMITED** ▾

Card Name: Jo Citizen      Card No. 444433\*\*\*\*\*1111      Expiry Date: 05/20

**NEXT**      **CANCEL**

Certain policies need to be manually processed by AIA. If you wish to update the payment information on one of these policies, please submit the new payment details by contacting AIA.

 **CHOOSE POLICY TO UPDATE**
✕


Select All

Policy status does not allow updating payment details.

SHXXXXX MCXXXXXX
▼

Card Name: Jo Citizen
Card No. 444433\*\*\*\*\*1111
Expiry Date: 05/20





Type the **Cardholder Name** and **Card Number** and select **Expiry Date**

 **CHANGE CREDIT CARD ACCOUNT**
✕

I acknowledge that I have received a signed Direct Debit Request or Credit Card Authority from the Policy Owner, and that this will be made available to AIA Australia in the event of a dispute by the Policy Owner. I also acknowledge that the Policy Owner has granted me authority to make this change on their behalf

Cardholder Name

Card Number

Expiry Date

Month


▼

Year


▼

SUBMIT

Once the details are completed, select **SUBMIT**. A message will confirm if the update was successful.

 **CHANGE CREDIT CARD ACCOUNT** HELP ×

I acknowledge that I have received a signed Direct Debit Request or Credit Card Authority from the Policy Owner, and that this will be made available to AIA Australia in the event of a dispute by the Policy Owner. I also acknowledge that the Policy Owner has granted me authority to make this change on their behalf.



## Credit Card Details Successfully Updated.

**Please note:**

- A letter will be issued to your Client informing them of the change.

**CLOSE**


# History Log

All changes made on a policy are stored in a History Log. Select **HISTORY** to view the history of that service.

**HISTORY**


Payments History shows a chronologically ordered set of past payment details.


## Change of Bank





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**BANK ACCOUNT HISTORY**


- 
Thu Dec 03 11:01:43 EST 2015 **LATEST**

Account Holder Name:	<b>Pete Evans</b>
BSB Number:	<b>XX3456</b>
Account Number:	<b>XXXX5678</b>
Adviser: aimis5680	
  
- 
Thu Dec 03 10:55:47 EST 2015

Account Holder Name:	<b>Lisa</b>
BSB Number:	<b>XX3034</b>
Account Number:	<b>XXXX5674</b>
Adviser: aimis5680	
  
- 
Thu Dec 03 10:53:52 EST 2015


Account Holder Name:	<b>Lisa</b>
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**Change of Credit Card**




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**CREDIT CARD HISTORY**

- 
Thu Apr 28 10:24:40 EST 2016
**LATEST**

Card Name:	Jo Citizen
Card Number:	444433*****1111
Expiry Date:	05/20
Adviser: aimis5680	
- 
Wed Apr 6 16:17:52 EST 2016


Card Name:	Daniel Ploeg
Card Number:	444433***** 4444
Expiry Date:	01/18
Adviser: aimis5680	


Address History shows a chronologically ordered set of address details for the Insured’s and Owner’s Residential and Postal addresses.





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**ADDRESS HISTORY**

- 
03/12/2015
**LATEST**

Residential Address:	23 Main St, Docklands, VIC, 3004, AUSTRALIA
Postal Address:	Same as Residential
Adviser: aimis5680	
- 
02/12/2015

Residential Address:	Dfo Southwharf, Next To Hilton Hotel, South Wharf, VIC, 3006, AUSTRALIA
Postal Address:	Same as Residential
Adviser: aimis5680	
- 
02/12/2015

Residential Address:	
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**AIA Australia**

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