

AIA ADVISER PORTAL USER GUIDE



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1. Getting started

This user guide illustrates how to access and use the AIA Adviser Portal.

All active advisers and Licensees (via the nominated Responsible Individual user account) have access to the AIA Adviser Portal.

Using your AIA or ex-CommInsure adviser code and password, access to the AIA Adviser Portal for the first time is via this <u>link</u> or from the AIA Business Growth Hub.



1.1 First time Logging in: Migration of existing adviser code access

For existing and active adviser codes, first time access to the AIA Adviser Portal will require you to migrate your access. To do this, click on this <u>Get Started</u> button shown below.

All statutes		Back to ala.com.au	Watch this <u>video</u> for a step-by-step quide on
	Welcome to the new AIA Adviser Portal Migrate your account to		how to migrate your existing access to the new AIA Adviser Portal.
è	Email username Nomme Amerikans voor advoer wole Antimito die rear performang yoor anal advoer.		
ت م	Link adviser codes If you have multiple adviser rodes, you can link and access the multiple adviser new user access. Delegate access Add delegate users to your staff can have their com		
-	acces to advicer codes that you authorise.		
	Already set up your account? <u>So to logo</u>		

1.2 Logging in to the Portal after migration completed



Once you have successfully migrated to the new AIA Adviser Portal, you can now log in via this <u>link</u> with your email address and password used to set up your access.

For security purposes, once you click on the **next** button, you will be asked to enter a One Time Pin (OTP) code that will be sent to your email address. Enter this code to finalise your log in.



Logging into the new adviser portal is via your email address and password. You no longer need your adviser code to log in.

2. Dashboard

and the second				
Haved	Welcome Bill		Address code	Al faderi sadar 🖉
	Applications		Rearcan	
	9 The concerning for assessment		125	-
	15 Victorial and an end		507 Exclusion	
	10 Instruction		0 Enderson of summers	
	0 Accessity in case		0 Leptergentises	
	2		4 Londerprime	
	The Menutage after projects, where and do not one Application activity Exciting between activity	n far seneri selladışı	n ng nyaétang nganén dinaka	
	Reference (0.1 UR-inspect 1		Tpdated 1 Status 1	
		No. other y	to show	
	may i terrarios i const i teòrada.or			
	Case $p \in I(M)$ to the advantation of a distribution of $\mathcal{M}(m,N)$ optimizes the state of the $(1,2,2,3)$ of the $(1,2,3)$ state of the $(1,2,3)$ of the $(1,2,3)$ state of the $(1,2,3)$ of the $(1,2,3)$ state of the (1,2,3) state of the $(1,2,3)$ state of the (1,2,3) state of the (1,2,3) state of the (1,2,3) state of the (1,2,3) state			n Min Australia Maria Maria Maria Maria Maria Maria Maria Maria Maria Maria Maria
	Le construction de la constru			

Once logged in, you will see the Dashboard. This interactive dashboard provides a quick glance into 2 sections: Applications (New Business) and Retention (In-Force). The dashboard will default to show you all the applications and policies that are assigned to all your adviser codes.

2.1 Switching between different adviser codes and/or consolidated view



To switch to a specific adviser code, enabling the portal to display information specific to an adviser code, rather than a consolidated view, you can select the relevant adviser code via the drop-down box in the top right-hand corner of the page.

Once the adviser code is selected, the dashboard will re-fresh and display only the policies for that code.

2.2 Applications Dashboard

The applications dashboard has 5 tabs plus additional information displayed at the bottom of the dashboard showing applications with status changes in the last 7 days.

@	Applications	Assention	-1	With underwriting fer eccepter
All and a	9 Mth underwriting for assessment	125 Techniquerkersets		with underwriting for assessment
C Owner	15	567	2	Outstanding requirements
Sk Applications	Cubismiling requirements	Overdue premium		0
Q Anisten	10	0 Delan const promote	3	Ready to issue
di Cami	0	0		
gr tryan	Rectivitied	Losefution	4	Recently issued
0 1000	Z - Applications expering some	4 Generalization		
	Latent activity, Waters charged in call 7 days			Applications expiring soon
	The "Manual Application" proposals - other to defailed evens as free for months	hely including any exclusionling requirement information.		
je 201 000	Andread and a strategy and a strategy and a strategy			
			Click on	the relevant tab or red arrow to
	Reference ID 1 Life inserved 1	Vipdated 1 Status 1	show fu	rther information in each section.
	he a	Guily is done		

2.2.1 With underwriting for assessment

Constant and a second	Regularisation		Batarrian.	_		The dashboard shows the life insured name,
I father	With underwriting far assessm Application with orderwiting for assessme	sent et alla diplopativeta salla.		*		application ID and last updated date.
() toru	Malescend *	Application 10 +	Updated 4			Users can then click through each
Q LAN	Technicata	A62535	30 007 2023			application to view further details.
A Long	Restartal a Parliament	A021083	2K 54 3120	-		
O hanna	Sectorio 1g	ANDINES	26,34,2025			
0 1000	Second to 17 Scanarille 17	A021010	an por an an			
	Second to fulfilling	A021082	31313125			
3- 180-100-1	Sector to 1 director and	A1(21/11)	0.00 0.00			
	taria Maliperposal	AU(111)	0k.54p.2525			
	Showing that 3 records					
						-
Applicatio	on A021205			Adviser code	All linked codes •	
Testerka Data						
Cinder assessment						
Application details	roposal Requirements N	otes				
Payment summary						
Total yearly premium	\$117.88					Payment Summary:
Yearly stame duty	\$0.00					Shows premium summary, including Stamp
	20.00					Duty, Vitality discounts and Vitality fees if
AIA Vitality discount ap	plied 🔘					applicable.
AIA Vitality fee	0					
Application Information						
Life insured name	Testerka Data					Application Information:
Date of birth	10 Los 1985					Shows all the relevant information for the
Save or stron	iv pin 1997					application, including contact details and
Submission date	30 Oct 2023					linked proposals.
Expiration date	28 Jan 2024					
Application days open	42					
induction of the second s	-					
Underwriter name	TBA					
UW contact number	1800 033 490					
AIA Australia email	infohub@ala.com					
Product Type	Priority Protection					
Proposals in application	n 0 08013967					J

Application details Proposal	Requirements Notes			
roposal 00012867				
Owner name Testerka Data	HALF_VEARLY	No	Commission souchine Upfront 2020	Prensum daldown P100
Instalment premium payable	11.15			
Instalment stamp duty	\$0.00			
Palicy fee	\$49.49			
All Vitality fee	\$0.00			
Total instalment payable	\$58.54			
XDT - Life Cover, Stepped, Exp	niry age 100			∎hedag) ∨

Proposal:

Premium information is shown here, such as mode, structure, and dial downs if applicable, policy fees, AIA Vitality fees and total premium.

Application A0	21205	Adviser code	All linked codes
Cinder assessment			
Application details Proposal	Requirements		
Requirement upload			
Documents uploaded will remain in 10uto underwrites	tanding requirements' well reviewed by	d requirement	eer uploaded documents
Underwriting requirements			
	No activity to show		
Admin requirements			
Credit Card Authority T Reported on SID Dis 2023 p Projected 2021/2027	o finalise processing this application, we require your client to fill or rovide this as soon as possible.	ut a Direct Debit or Cred	dt Card Authority. Please

Requirements:

In here you will see any Underwriting or Admin Requirements.

You are also able to upload documents directly to the portal for the UW/Admin team to progress the application.

Application A Testeria Data	Application A021205					
O Under assessment						
Application details Proposal	Requirements Notes					
Notes to the adviser						
30 Get 2023	Please note that additional underwriting requirements may be requested	following essession	ent by our underwriters.			
30 Oct 3023	If your application is for new cover, you may be eligible for interim accider cover, based on the types of cover you have applied for in your applicatio interim Accidental Death Cover Interim Accidental Total and Permanent Disablement Cover Interim Accident Union Receivery Cover Interim Accident Uncome Protection Cover Exclusions apply. Please see your product disclosure document for the full	t cover for up to 9 rc	0 days for the following ions regarding this cover			
30 Oct 2023	If we have requested information for external parties, we have used the a application to do this. If you do not agree with this request for information	rthority form's yo Lyou can ask us to	u provided with your o review our request.			

Notes:

Notes tab will display any notes left by an underwriter/assistant pertaining to the application.

2.2.2 Outstanding requirements

Outstanding require Aphatos with on or most	ments october if hy nappharmer for	ef beschapfageel in Priz Indoke		^	
the inserted 1	Application (D. 1	Optional 4	Panding requirements 1		
185780 ACH 528	1902/02	01.kog 3023	Const Instantor		
10101-001028	12522000	11 Sep 2023	and constants		
TECTED. ACVISER	1002031	11 Sep 2023	Constant Section of Constant o		
Terror Auditor	A021070	51 Aug 2025			
1027 1027	13032700	11.549-2023	and spectrum		
Second Distant Schulling	A0211020	273472828	Contraction (Contraction)	1.	
Security in Ohioful Wing	A021023	11 Aug 2023	COLUMN TRANSMIT		
Showing 1 to 10-of 15 meterik					

There are 3 main types of requirements:

Admin requirements

Underwriting requirements

Underwriting & Admin requirements

In addition to the above, this tab will also display any Manual Applications.

Manual Application

2.2.3 Ready to issue

Ready to issue Applications maily to be been	d off the displayed in the table.		-
Shinword 1	Application (D. 1	Updated +	
Tryinyiny Dissertation	#011162	35.5ap.3023	
Little Sec	ALC: 10	0036363	
Ted Testar	A221178	13 OH 2828	1.1
Data Databa	#821113	58 Sep 3123	
402003 Total 400	AU1117	5 AU 233	· · · ·
Marrie-Lein Hone M	A221014	24/2/2023	
Zane here	A221011	18 Aug 2223	
Description of Mexicols			

Ready to issue:

Applications that are ready to be issued into production will be displayed here.

Usually, they are pending Adviser Instructions for commencement date.

2.2.4 Recently issued



Recently issued:

Recently issued policies will sit in this dashboard for up to 7 days. It will also be displayed in the bottom section of the dashboard. After 7 days, it will be removed from the dashboard and will only be shown under the Policies menu (in-force).

@1020***							
III faitheast	147	alaama Dii					
	VV(Welcome Bill Interest Application expiring soon Application of parameters participanes 75, sign of address of the destination Application of the address of parameters participanes 75, sign of address of the destination Application of the address of t					
	and the second second	din		1 more	tion .	_	
	Applications	expiring soon	alta ogéneente	ed op over 15 days calculated	ton the log of advances	×	
	Universit?	Application (2-1	Updated 4	Exploration data #	Storban 1		
	1.4.4.4 (1.1.1.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4.4	A621165	25 Sep 3123	2+ Dec 2022	Contract of Contra	1.1	
	TEITO ADVISER	10060421	15.0+p.2423	1×0m,2010	Contraction of the logical set	1.1	
	Drawing 2 of 2 mil	u-da					
	2	10.00 (10.000 To 10.000		- 4			

Applications expiring soon:

Applications that are expiring soon means they have been in pipeline for more than 75 days – these applications will show here until the 90th day, where it will be sent for cancellation.

Advisers should use this dashboard to follow up progress/outstanding requirements with clients, as the application will soon expire.

2.3 Retention Dashboard

@	Applications		Resention	
E Calificant	9 With underweiting for essensioner:		125 Izonng antersets	
C Curren	15 Calcianding reportments		567 Consider president	
C frains	10 Received to include		0 Datamand payments	
a ces			-	
(ji teyan	O meaning issued		0 Later Justices	
8 francis	2		4	
0 rests	Application opposing prom	· · · ·	Generalised publicies	
	Latest Activity-Status charges in part 7 days	ectorelie most actually	entaing ary automoting requirement internation.	
je mir neu	Application activity training business activity			
	Reference ID 1 Life inserved 1		Updated 1 Status 1	
		No activity	to chose	

The retention dashboard has 5 tabs showing policies that meet the following criteria:



You will also see existing business activity in the bottom section of the dashboard page.

2.3.1 Upcoming anniversaries

200000	Upcoming annih Paloos with sporting	versaries annessydate and an	the for renewal within the ren	190 days of the Explored	+ Tec 1,054.	×	ula 1
	Universal 1	Palicy no. 1	Anniournary data 1	Canant provision 1	et Annealysmian 1		
	2-0000 (D-1000)	12100422	07746-2024	8741.04	ENLOR	· 1	
	NA DA	NORTH	01 (an 1154	4002.00	1102.00		
	******	112010271	02 Petr 3124	1712.12	878.75		
	#0000.00X	TODAH	62 Feb 2026	4525.23	6764.52		
	#61.0032	UDHI/	22.0=.2003	10/107-00	60,607.09		
	161 VA	12222019	15 per 2024	10,522,49	61,562.69		
	#E1.94	12200720	15pe-3104	\$294.73	\$305.38		
	Showing Free Heart 125	records				• •	

Upcoming anniversaries:

Policies with upcoming anniversaries within 90 days, will be displayed here until the policy passes anniversary. This page shows the policy number, anniversary date, current prem and est. prem on renewal.

Once the policy passes anniversary, it will be removed from this section of the dashboard and display elsewhere in the portal (ie. In-force policy menu, lapsed policies dashboard etc).

2.3.2 Overdue premium

Overdue premi Palate ell' parteri	um conter of the displayed	n filo Jako, Polizy will be dhoi	and a title page of the such	wintput	×
Universed 1	Palayon, 1	Paid tendete 1	Overday amount 1	Leperdate 2	
2-000000-000	20104104	27 No. 2022	824627	21(ar-2024	· •
2103.011	120721-0	10 Sep 2023	925.45	09 Nov 2023	· ·
20.21	200796802	20 Jay 2023	FU-628	19 Nov 2022	
210.000	1225047	28 Aug 2023	97542	27 Oct 2020	
Decision of	20042+00	21 mg 2003	896.37	12-0e-1012	
1000	12452807	28 Aug 2023	\$2,128.73	37-0er 2020	
12100124	420-4210	10 Jay 2003	91,042.27	49 May 2022	
You DOOLLA Showing 1 to 10 of 50	400-4300	10 (ay 202)	91,942.37	4 k k -	

Overdue premium:

Policies that are overdue for payment are displayed here.

The lapse date is also highlighted here if the policy is not renewed.

2.3.3 Dishonoured payments

Dishonoured paym Policies with dishonoured p	nents agements will be displayed i	n this table. The policy will be	displayed until payment is n	ceived or policy lapses.	×
Life insured *	Policy no. t	Dishonour date †	Next debit #	Lapse date #	
3A TESTDATA	00012634	01 Sep 2023	22 Oct 2023	22 Sep 2024	→
Showing 1 of 1 records					

Dishonoured payments:

This dashboard will show the policies that have had the premium payment dishonoured.

2.3.4 Lapsed policies

Lapsed policies	avment overthae by 61 ck	ers will be displayed in this table	de. The policy will appear for 90 d	en following the paid to date	×
Life insured *	Policy no. 1	Paid to date #	Premium frequency #	Lopsed date #	
YOX X000 MA	64741540	07 Aug 2023	Annual	10 Oct 2023	
REPORT CHOIL	64620852	15 Aug 2023	Annual	10 Oct 2023	
ROIDOL CHOK	64620876	15 Aug 2023	Annual	10 Oct 2023	*
ND0000X NACCODD00000	6830/1550	07 Aug 2023	Annual	09 Oct 2025	-
NUCCOL DAUCOL	26211411	01 Aug 2023	Annual	09 Oct 2023	*
MAX LAX	10776199	13 Aug 2023	Annual	10 Oct 2023	*
KYR GAX0000	67303171	08 Aug 2023	Monthly	09 Oct 2023	a -
Showing 1 to 10 of 16 re	cords			< ()	I

Lapsed policies:

Policies that have lapsed within the last 90 days will be displayed here. This includes policies that have not been paid to date and have exceeded their lapse date.

Once it exceeds the 90-day mark, you will no longer be able to view the details via the portal and will need to apply for reinstatement with a DOCGH or comply with any other reinstatement rule requirements.

2.3.5 Cancelled policies

We	lcome Bill			Abbresh	1	a .
Cancelled police	ti es The displayed in this father	v Krauch versterer in	nud at us.			
storage -	Pality No. 1	Paid to data 1	Profilian Triquency 1	Canceline care 1	- 1	
along Theres	0103-04	25 Aug 2625	Interesting	21 Sep 2023		
USTRU, SATISTICO	00013758	68 Sep 2025	Mundhly	20140-2023		
Rise Decision	1080128	21.444.0222	Munitity	21042		
NUMBER OF STREET, STRE	42547545	26.4-2.2123	Annual	25549-2523		
THEFT					- 1	
Sendrorom					_	

Cancelled policies:

Like lapsed policies, this will show policies that have been cancelled (instead of lapsed) and will continue to show for 90 days.



2.4 Latest Activity – Status changes in past 7 days

Application activity	Existing business activity			
Reference ID 1	Life insured #	Updated #	Status #	
Q Search applicatio	n ID, life insured name or status			
A021205	Testerika Data	35 0ct 2023	Dinder ansevument	-

At the bottom of the dashboard page, this section displays a summary of activity from the top two dashboards (Applications and Retention) within a 7-day period. Think of it as a news feed for you to stay up to date with your portfolio for AIA and ex-CommInsure policies.

3. Side Menu



On the left-hand side of the portal, there is a side menu with the following sub-menu items:

- Dashboard takes you back to the landing page (dashboard)
- **Quotes** option to access the AIA quotes software (eApp) or the ex-CommInsure quotes software (myQuote) via Single Sign On (SSO)
- **Applications** Provides a summary of applications in progress as well as navigate to your draft applications (via SSO to AIA eApp software)
- **Policies** A summary view of all your In-Force policies and Out-of-force policies (90 days). This section is also where you view policy information and access self-service to update client details
- Claims Provides a summary of claims data and access to information regarding the claim
- Reports A one stop shop for all your AIA and ex-CommInsure reporting requirements as well as where
 you access Commission Statements
- Resources Access to all the Forms and Resource Library available in the portal
- Settings Update user profile, set-up/maintain delegate user access, set-up/maintain your adviser codes, Data Feed to your selected planning software (AIA policies only) and management of your email preferences for AIA subscriptions/marketing communications.

4. Quotes



From the side menu, you can access the Quoting platforms for AIA or ex-Comminsure.

This will be available as a single sign-on (SSO) into eApp for AIA Quotes and MyQuote for ex-CommInsure Quotes – only users who have access to those systems can SSO into the QAT platforms.

4.1 AIA Quotes



To access AIA quoting platform, select AIA Quotes. You will be required to select one of your AIA adviser codes (if you have multiple codes) to log into eApp portal via SSO as shown in the illustrations below.

Once you have logged into eApp, you will be taken to the quoting portal. You can return to the AIA Adviser Portal at any time as eAPP will be open in a new browser window.

4.2 ex-CommInsure Quotes



To access ex-CommInsure quoting platform, click on exCommInsure Quotes and then click on the **go to quotes** button. This will take you to the MyQuote portal. You can return to the AIA Adviser Portal any anytime as MyQuote will be open in a new browser window.

If you have more than one ex-CommInsure adviser code, you will need to select which code you want to access MyQuote.

5. Applications

From the side menu, you can access your Applications (AIA new business applications and draft applications only). This function is not available for ex-CommInsure applications as this book is closed to new business and MyQuote is only applicable for quoting cancel and replace quotes.

5.1 Applications in Progress

The information displayed in this section is similar to the information displayed in the Applications dashboard. This section provides a consolidated view of all applications in progress and their status.

0			Applications in progres	A.				
419	HERITWER LONGER, BETTER LINES		Application ID †	Proposal ID #	Life insured #	Updated #	Status #	
88	Dashboard		Q Search application	on ID, proposal ID, life in	nured or status			
	Ouotes		A021205	00012867	Testerka Data	30 Oct 2023	Coder assessment	-
	Applications	Applications in Records	A021178	00012844	Foll Tester	13 Oct 2023	C Ready to hour	-
	Approacons	Applications in Progress	A021166	00012831	Thyhyhy Directdebit	25 Sep 2023	C Ready to bour	-
6	Policies	Draft Applications	A021112	00012800	Efefe Efefefe	8 Sep 2023	Ready to hour	
6	Claims		A021109	00012797	Ustbill Test	8 Sep 2023	Ready to houre	
¢	Reports		A021100	00012794	Data Multiproposal	6 Sep 2023	Cinder assessment	-
8	Resources							
0	Settings		A021099	00012792	3DNew Data	6 Sep 2023	Ready to some	-
			A021098	00012790	GaNEWER D.Ata	5 Sep 2023	Cancelled or withdrawn	-
			A021097	00012788	GANEWdata Concelled	5 Sep 2023	C beclined	
			A021092	00012780	4Anewdata Tester	4 Sep 2023	Chder assessment	
e-	Hide menu		Showing 1 to 10 of 3	7 records			(1) 2 3 4	3



By clicking on any of the table headings, you can sort the data in "order" or "reverse order" for that heading, to aid searching for a specific case. Alternatively enter part of any data field displaying in the search box and closest matches will only appear in the list.

5.2 Draft Applications



Click on the **Draft Applications** option to proceed to the AIA eApp portal via SSO. You will need to select the Adviser Code you want to access the draft applications.

6. Policies

From the side menu, you can access the Policies database, which is split into In-force and Out of force (within 90 days). These screens function the same, so we will only highlight the information displayed in the "In-force" section.

RADAR LOWER		In-force	Policies			Administration 2017/1011006	•
Dashboard		\$3,004,986.57	; o	Briden 853			
D Quotes		Policies in-freez	Lib issued 1	Computer 1	The second se		
D Applications		C). Search policy	number, life insured name or st	ne .			
Policies	in-force	79081282		**	28 Aug 2223	• Instancement	-
🕼 Claims	Out of Force (90 days)	79831287	CHROLIDOUS HEROCES		12 245 2022	 Testis perior. 	-
@ Reports		79795389	184000X T01000X	-	1918-2023	 Isoniq anterary 	-
Resources		107913277	ABROOK TORON	**	1916-0223	 Sporting and average 	
D. come		79673225	Igner Disconcered	**	29 Aug 2023	Independent	-
gy settings		70663125	GANNO 4400000	45	14 Get 2020	Conferencies	-
		79681219	30002 1000000	**	1+343-2003	 Terila perfect 	
		79642779	60.800	**	12 Sep 2021	Tertle periot	
		19942731	Change and the second	**	12.049-2020	Contraction of Contract	
In- Hide menu		Showing Toe 184	17893 resurds		0 + - +	1.1.1.1.1.1	•



To view the total policies and total annual premiums for a specific adviser code, select the adviser code from the top drop-down list.

6.1 Detailed policy view

Key insights					
Total annual premium \$3,004,986.57	0 Poli	des 2			
Policies in-force					
Policy no. 1	Life insured #	Organisation #	Updated #	Status #	
Q Search policy in	umber, life insured name or status				
75682262	ROX000X AU100X	AIA	26 Aug 2023	Overdue premium	•
79642203	R4000001 HEX00003	AIA	14 Sep 2023	Cherclus premium	•
79633287	CH0000000X HEX0000X	AIA	13 Sep 2023	Overdue premium	
79795389	AEDOLOGI TOHOOIX	AIA	10 Nev 2023	Classening antiversary	
79795377	AEX0000X TOX000X	AIA	10 Nov 2023	Cipcoring anniounary	+

Within the In-force/Out of Force (90 days) section, you can view detailed policy information by clicking on the relevant policy as illustrated here.

6.1.1 Self-Service policy documents and update client information

When you click into a policy, the top section will display the self-service functions available for that policy. This function is only available for AIA Priority Protection Policies.





The Service request function is only available where a Financial Adviser Authority has been provided by the client. If no authority has been submitted, an error message will be displayed in Evolve.

6.1.2 Policy details



Policy 79795	389	Adviser code All Inikad	With section	in the Policy details tab, there are 4 ons as illustrated in the following image
C in Since C Field to date D Upcomm	g annworsary	(Service request	
Product Disclosure Statement	Atteration quote C Genera	ere certificate of CD		
Policy details U/e insured	Cover Correspondence Beneficiaries			
Indicative anniversary premium (9	0 to 30 days prior to anniversary)			Indicative anniversary premium
Including indexation	\$2,018.35			(90 to 30 days prior to anniversary) or Anniversary Premium as per
Excluding indexation	\$1,907.39			anniversary letter or Overdue details
Anniversary date	10 Jan 2024			Upcoming anniversary or Overdue
Policy details				Premium.
Product name	Priority Protection (2013)			Deliau dataila
Commencement date	10 Jan 2014			The policy details tab will display
Linked policies	79796377			relevant information such as:
Policy owner	ABR0000 F03000			Renewal premium/Indicative premium
Address	23 X000000 X000000, Ruity 2075 NSW			 Policy Anniversary date
Email address	PRPLAZ7610Halapuat.com			Product name
Phone number				Commencement date
Premium details				Linked policies
Instalment premium passable	Remun Inquercy	Ward to date		Owner and contact information
\$1,821.09 ed. 1905 Au	Annual	10 Jan 2024		Current premium details
Payment method	Direct Debit		EST	Discounts applicable
818 number	062001			Commission details
Account number	1234567			and more
Premium structure	Stepped			
AIA Vitality discount Lang Sun	5054		0	Promium dotoilo
AIA Vitašty discount Innera Deserve	N/X		3	Freihum uetaits
AIA Vitality fee	NP/A			
AIA Health discount	NA			
Commission details				Commission details
Commission structure	CE15U			
Initial percentage	21%			
Renewal percentage	10%			

Policy 79795	389	Adviser code	All linked codes
🖨 in fanta 🖉 Paint In data 🖷 Upcamin	g arriverary		Service request
Product Disclosure Statement	Attention quate	D	
Policy details Life insured	Cover Correspondence Beneficiaries		
Details			
Life insured	ABROOM TOYOOK		
Gender	Fermale		
Date of birth	25 Feb 1971		
Age next birthday	53		
Smoker status	Non Smoker		
Occupation			
Occupation category	м		
A/A Vitality	0		
AtA Health insurance	0		
Contact details			tat
Phone number	424554654654		
Email address	PPPI5837519doi apuet.com		
Address	23 X000000 X000000, Relty 2075 NSW		

The	Life	insured	tab	will	display	relevant
info	rmat	ion such	as:			

- DOB
- Smoker status
- Occupation and category
- Vitality and/or Health links
- Contact details

The **Cover** tab will display relevant information such as:

- Policy benefits
- Sum Insured
- Commencement date
- Premium structure
- Special terms (if relevant)

You can view each benefit type by clicking on the $^{\prime}\nu$ within the benefit tiles.

EDODOC TOXOCC			
Crisis Recovery, Comprehens	tive, Stepped, Crisis Expiry age 70, LOI Expiry age 100	inforce	^
Sum insured Instalment premium	6181,178.80 61,509.84		
Commencement date Premium structure	10 jun 2014 Supposi		
TPD Definition Special terms	LOI		
Crisis Recovery Buy Back, St	epped, Expiry age 65	 In funce 	~
Crisis Reinstatement, Steppe	s), Expiry age 65	🔵 mfanas	¥

Policy details Life insured Cover Correspondence Beneficiari

	95389	Adviser code All linked codes
Product Disclosure Statement	Alteration quote C Generate certificate currency	° D
Policy details Life Intur Correspondence	nd Cover Correspondence Beneficiaries	
Decument *	Date #	
Q Search correspondence	17300	
Repricing Letter	6 Dec 2020	View
Showing 1 of 1 records		

The **Correspondence** tab will display a list of historical correspondences. This includes correspondences such as anniversary letters, cover letters and policy schedules, re-rate/ rate rise letters etc.

Some correspondences such as renewal letters will only be available for a period of time.

Policy details	Life insured	Cover	Correspondence	Beneficiaries
Total Care I	Nan Super			
Chid Yola A	oaoy			
Date of birth	14 Dec 2019			
Relationship	Spouse			
Chid Ycea A	oacy			
Date of birth	16 Sep 2013			
Relationship	Spouse			
Mr Aoacy Y	06930			
Date of birth	4 Sep 1981			
Helasionship	Spouse			

The **Beneficiaries** tab will show the benefactors and the % allocation for each, as well as the details of the benefactors as per nomination of beneficiary.

7. Claims

6		Claims				Advi	ner code 🛛 All linked codes	·
416	C NETTOR UNICS	Caine data is	any welate surrently	for tall administered partic	ies jeu Committeure claims with the available	en mefuture)		
88	Dashboard	Submitted claims						_
D	Quotes	Claimee. 1	Pelicy no. 1	Life Insured 1	Benefit type 1	Updated 1	Status 1	
		Q. Search clair	m number, pality nu	riber, life insured name	or status			_
5	Applications	97154	12239757	PRID, Fred	Gross Recovery	9 May 2022	@ Cost	•
0	Policies	64737	10000210	FRED, Fred	Grass Recovery	11 Sep 2014	@ Count	-
45	Claims	67926	12457437	FRED, Fred	Grass Receivery	24342014	@ Cont	-
19	Departs	87344	12362275	FRED, Fred	Grate Receivery	8342014	0 mmt	
9		85013	10479056	FRED, Fred	Waiser of Dremium	12 May 2028	@ Treet	
8	Resources	15867	12468393	FRED, Fred	Whole of Life & Endowment	26 Sep 2013	(Cont.)	
Ø	Settings	72548	12522144	PRED, Fred	Crisis Recovery	28,649,2015	(Const.)	
		71222	12793851	MED, Fred	Total & Permanent Deathing	20 jan 2015	@ Cont.	•
		76709	10010454	reco, freed	Income Protection	22 May 2013	@ treat	-
		74767	10101054	FRED, Fred	Income Protection	22 May 2013	@ thest	•
e-	Hide menu	Showing 1 to 1	arf 100 records		< (1)		1 1 1 1	

From the side menu, you can view Claims information for AIA policies only. Ex-CommInsure claims will be available in the future.

Claims:

The claims dashboard will display the following information:

- Claim no.
- Policy no.
- Life Insured
- Benefit type
- Updated
- Status based on the following options:



1 Under Assessment

Select the claim to view further information.

7.1 Claims detail

Once a claim is selected, you will be able to view the following information, as illustrated below:



8. Reports

AND REAL PROPERTY AND	
B Dashboard	
🗅 Quotes	
B Applications	
Policies	
圆 Claims	
(Reports	Reports
Resources	Commission Statement
Settings	
e- Hide menu	

From the side menu, you can access your Reports and Commission Statement.

8.1 Reports: Consolidated Reports, AIA Reports, ex-CommInsure Reports

The reports page is split into 3 reporting categories as illustrated below:





WATCH THIS SPACE: AIA reports and ex-CommInsure reports will soon be available as a combined report under Consolidated Reports.

8.1.1 Consolidated Reports

In the Consolidated Reports tab, there is currently one report that is available:



AIA Upcoming Anniversaries Report (Within 90 days of anniversary) – including ex-CommInsure

To view/download a report, click on the CSV button. The file will download and be available in your Download folder on your device.

1

8.1.2 AIA Reports

Reports	
Consolidated Reports AlA Reports ex-Comminsure Reports	
It reases note that the majority of the reports deplayed are generated on system data at the end of each business day unless specified. Where you have adviser code linked, the below reports will certain analyzarated data.	more than one AIA
Available reports	ortant report footnotes
AlA Detailed Policy Report This report will provide details of all in-force policies as at current date and Out of force policies for the post 12 months.	Can
AlA Overdue Premium Report This report will provide details of all policies with outstanding premiums as at current date.	av
AlA Dishonoured Policies Report This report will provide details of all active policies with a recent dishonoured transaction.	(GV)
AlA Lapsed and Cancelled Policies Report This report will provide details of all policies that have been cancelled or lapsed due to non-payment of premiums in the past 12 months.	(GV)
AlA Next Premium Due Report This report will provide details of all policies with a next premium due within 62 days.	(GV)
AIA Auto-Surrender Report This report will provide details of all policies outo surrendered in the past 12 months.	GV
AlA Vitality Client Report This report will provide details of all policies with active AlA Vitality memoership details as at current date.	W

In the AIA Reports tab, the following reports are available:

- 1	AIA Detailed Policy Report
2	AIA Overdue Premium Report
3	AIA Dishonoured Policies Report
4	AIA Lapsed and Cancelled Policies Report
5	AIA Next Premium Due Report
6	AIA Auto Surrender Report
- 7	AIA Vitality Client Report

8.1.3 ex-CommInsure Reports

Reports	In the ex-CommInsure Reports tab, the following reports are available:
Consolidated Reports AIA Reports ex Comminsure Reports	ex-CommInsure policies with non-payment
Please note that the majority of the reports displayed are generated on system data at the end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified. Where you have more than one end of each business day unless specified.	ex-CommInsure In-Force Portfolio
Available reports	To view/download a report, click on the
ex-Comminsure policies with non-payment This report will provide details of all policies with ourstanding premiums at a current date	CSV button. The file will download and be available in your Download folder on your
ex-Comminsure In-Force Portfolio This report will provide details of all active policies at a current date.	device. You can download multiple reports at the same time.

8.1.4 Important report footnotes

At the top of each reporting section, there is a button to view important report footnotes. This section provides an overview of the reports available, how some fields are calculated, the time/duration of the report criteria and other important information.

Reports	
Consolidated Reports AIA Reports ex-Comminsure Reports	
Please note that the majority of the reports displayed are generated on system data at the end of each business day unless specified	d.
Available reports	Important report footnotes

8.1.5 Commission Statements

Commission statements are downloadable based on an individual adviser code only. To select the adviser code to generate the commission statement, select the relevant code from the top right-hand corner of the screen. Commission statements will only be stored on the adviser portal for 6 months, anything older than 6 months will require the Adviser Remuneration Team to manually process and send to the requester, see message banner below.

The Commission Statement/s available for download will be displayed in the list below, these are available to download as a ODF or XLS file.

Commission Statements			All linked codes		
Only statements covering the preceding 6 months are available, for older statements, please contact au retailar/viseradmin@aia.com					
Latest statements					
Adviser Code †	Date \$		Export		
Q Search adviser name or code					
Bill Gates 200008012	1 Feb 2023		PDF XLS		
Showing 1 of 1 records					

9. Adviser Health Portal

You can access the link to the Adviser Health Portal from the resources section.

@ 2001***		٥
I interest	AIA Health Notice Call To call where a	
S Aplate	Access Alk Health	
© total		
A long	¥	
g waterband		
E Amore	Access AlA Health To access RA Health	
	Rest Handles Co	
> 100 mm		
		_

Select your adviser code and click the 'Go to Health Portal' button.



You will be taken to the Home page of the Adviser Health Portal.

The Adviser Health Portal provides you with a seamless referral process, with greater transparency on customer 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:



My Referrals

Find and download your client's details, see the progress of their referral, and the estimated referral fee. It can take up to 15 minutes to refresh, so please allow time after submitting a 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 booking and reference number will be provided. You can also reschedule or cancel existing appointments.



Marketing Collateral

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

10. Resources



From the side menu, you can access various resources such as forms, resource library and help content.

10.1 Forms

Forms		
New business Underwriting Policy Services		
Priority Protection PP for Platform Investors Tailore	d Protection	
Name 1	Type I	
Q. Search procedures and forms		
Application Form	Applications	Vex
Application Form - Section W AlA Super Scheme 2	Applications	Vex
Tele Application Data Collection Form	Applications	Ver
Cancel & Replace Application Form	Applications	Vex
Cancel & Replace Application Form - Comminsure	Applications	Vex
Nomination of Deneficiaries Super Scheme	Deneficiary Details	Ver
Nomination of Beneficiary Form - Non Superannuation	Beneficiary Details	Vew

All forms available will be listed here and separated into the following sections:



Within each section, you can view the forms available for Priority Protection (AIA), PP for Platform Investors and Tailored Protection (ex-CommInsure).

To view the form, click on the view button.



You can also search for a form by entering the name of the form in the search field.

10.2 Resources Library

Guides & TECE documents Pipers & Brochures	The resources library is separated into 2 sections:
Guides & TECE documents	Guides & TECE documents
Priority Protection / FFPI AIA Vitality Tailored Protection Other	Flyers & Brochures
Nome 1 Type 4 C Stanth Inference documents Tele Application Guide For Clients Tele Application Flyer For Advisers Summary of Changes	Within each section, you can view the resources available for Priority Protection/ PPI (AIA), AIA Vitality, Tailored Protection (ex-CommInsure) or Other. To view the form, click on the view button.
Statement of Advice Priority Protection Proposals in Program Report Addression	You can also search for a form by entering the name of the form in the search field.
Product Summary Priority Protection Product Disclosure Statement	Ver

11. Settings

TIP	MEASTING & DAMAGE	From the side menu you can access the settings. In here, you will be able
88	Deshboard	1 Profile
٥	Quotes	2 User Management (delegate)
16	Applications	3 Adviser Codes
0	Policies	Datafeed
49	Claims	
¢	Reports	5 Email Preferences
8	Resources	Settings
Ģ	Settings	Profile User Management Adviser Codes Datafeed Email Preferences
←	Hide menu	

From the side menu you can access the settings. In here, you will be able manage:

11.1 Profile

Profile User Management	Adviser Codes Datafeed Email Preferences		In ed	the profile settings, you will be able to it the following information:
Contact details			7-0	Contact details: Username, Mobile
Bill Gates				
User name	aia20000012@getrada.com	(648)	
Mobile phone number	041855555	(•••	
Business phone number	0398881111	(ide)	
Preferred email address for cor	rrespondence		2	Preferred email address for
Email address	aia200000012@getroada.com	((dt)	correspondence
Adviser details			3	Adviser details: ASIC Authorised
ASIC Authorized Representative number	2312222	(Representative Number
Addresses			4	Addresses: Business address,
Dusiness address	111hte ASHTON/RELD NSW 2323	(64	Postal address
Postal address	111hte ASHTON/IELD NSW 2323	(
Security settings			5	Security settings: Password
Password		Change passe	•••	•

11.2 User Management

In the user management setting, you will be able to add, view or remove a delegate user to your account.

Delegate users can view any or all policies under any or all of your adviser codes. You also have the option to provide access to Commission statements to the delegate user.

dviser Codes Datofeed Email Preferences		
		lekyne
Email 1	Status I	
shreshtha a srivastava@ala.com	· Estat	
dBs.com	• funding	t)
	dviser Codes Datofeed Email Preferences Email 1 shrushtha s.srhustave/Hais.com d/#s.com	elviser Codes Datafeed Email Preferences

To add a delegate user, click on the **Add delegate** button.

To view the delegate user profile or unlink their access, click on the button on the righthand side for that profile.

11.2.1 Add delegate

To add a new delegate to your account, click on the add delegate button.

1. Fill in the information as illustrated

× Add staff Add new or existing staff to your account. Email address* Continue	
Add the new user delegate_01@getnada.com to your account using the form below. First name* Last name* Mobile phone number* Business phone number Choose an adviser code to add the user to* Allow commission statements Continue	 Select the adviser code from the drop-down menu Click on the Allow commission statements checkbox if you want the delegate user to have access to this. Once you have filled in the form, click continue
Add staff Accept the Terms and Conditions to continue Vour responsibility when providing delegate access to the AtA Australia Adviser Portal 1) You may only provide delegate access to the Adviser Portal to a person (Delegate) who: a) needs to have access to the portal for the purpose of performing acts on your behalf and at your specific instruction (Purpose); and b) agrees to, in respect of the Delegate's use of the Adviser Portal and the information on it, comply with your confidentiality obligations and other relevant obligations owed by you to AtA Australia in any other relevant agreements between you and AIA Australia (including but l agree to the Terms and Conditions Back Continue	

You will then see the notification stating an invitation has been sent to the delegate:

An invitation has been sent to delegate_01@getnada.com

Delegate users will need to activate their account via the email link sent.

11.2.2 View delegate user profile

Settings Profile User Managemen Current users	Adviser Codes Datafeed Email Preferences	Add doingen	To view the delegate user profile, click on the button on the right-hand side. You will be able to:
Name 1 Q. Search-users Delegate 200000012 Delegate Three Delegate AM ava20000012	Email # c20000013@getrada.com delegate3@getrada.com c200000012@getrada.com	Status I New profile Resend invite Remove user	 Resend invite (for newly added delegate users that have not activated their account) Remove user
Contact details Name Email Mobile phone number Business phone number Permissions Adviser codes Deleases elektes to lack de	T P delegate_0105getnada.com o11111111 020000000 200000012 20000012 Comminute entements		View delegate profile: You can review/edit the permissions for the delegate user by viewing the profile and clicking on the edit user button.

11.3 Adviser codes

Settings				
Profile User Managemen	t Adviser Codes Datafeet	Email Preferences		
Active codes				Altone
Code 1	Nickname 1	Organisation #	Date added #	
280000134	Lekesh	A1A.	4 Dec 2023	
20000012	omlaia	AIA	14 Dec 2023	elt

To view, edit or add adviser codes to your profile, click on the **Adviser Codes** tab.

Edit adviser code:

You will only be able to edit the "nickname" assigned to the adviser code via the **edit** button. No other information can be amended.

11.3.1 Add adviser code

Enter an existing adviser cod your account.	le and its password below to sync it to
Adviser code	
Password	
	0
Forgot password?	

To add an existing adviser code to your account, you will need the adviser code number and password used to sign into that account. Once you've entered the details, click on the **link code** btton.

11.4 Datafeed

11.4.1 Activate datafeed

Settings Profile User Management	Adviser Codes Datafeed Email Preferen	ces	t
The doublesc tao inty will allow All The data in this feed will be read actively working to provide this f	in to provide you with a daty need containing canne and p is excitable to you in your selected planning echosics. Be within to you as soon as possible.	oloy detais associated with your account por en o ave este life's feature is currently unavailable for ex-	nty interction products only), « Commitment codes: We are
Adviser Code 1	Tool 1	Status 1	
289903410	XPLAN Voca DI	Active (Deactivate feed
280000134 AM	NOA	Coveginand	Activate food
20000012	PLATFORMPLUS	Author	Destivate feed
Showing 3 of 3 records			

To activate the datafeed for any of the adviser codes, click on the **Datafeed** tab and select the adviser code that you want to activate.

Datafeed is ONLY available for AIA policies currently. Although ex-CommInsure codes will display, these will only be available to register in future releases.

Select from the list of tools available, click on the declaration box and click submit to activate the datafeed.

* 100	
Select	•
XPLAN	
COIN	
ADVISER LOGIC	
PLATFORMPLUS	

~	I declare that I am authorised by clients to access their policy information (including any personal information). I will not use this tool to access the Information of any other clients and I will take reasonable steps to ensure unauthorised personnel do not access my client's policy information.				
_		Cancel	Submit		

11.4.2 Deactivate datafeed

To deactivate a datafeed for an adviser code, select the code and confirm deactivation.

Datafeed				
Adviser Code 1	Teel #	Status I		\odot
280900410 AA	XPLAN View RM	Ø Atte	Deathete feed	Deactivate datafeed? Are you sure you want to deactivate PLATFORMPLUS datafeed? This action will deregister you from the 200000012 code.
280000134 AA	NIA	O Lingutarial	Activate fixed	
20000012 AA	PLATFORMPLUS View.RDF	O ATTA	(Deactivate feed)	Yes, deactivate
Showing 3 of 3 records				Cancel

11.5 Email preferences

Settings



To manage your email preferences for communications with AIA, click on the type of communication you want to receive. You can change these settings any time.

12. Further Support

For further information or technical support relating to the AIA Adviser Portal, please contact the following:

Email: newadviserportal@aia.com

Phone: 1800 271 031

Website: https://www.aia.com.au/en/adviser/business-growth-hub/resource-library/your-new-adviser-site

AIA Australia

509 St Kilda Road Melbourne VIC 3004

aia.com.au

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