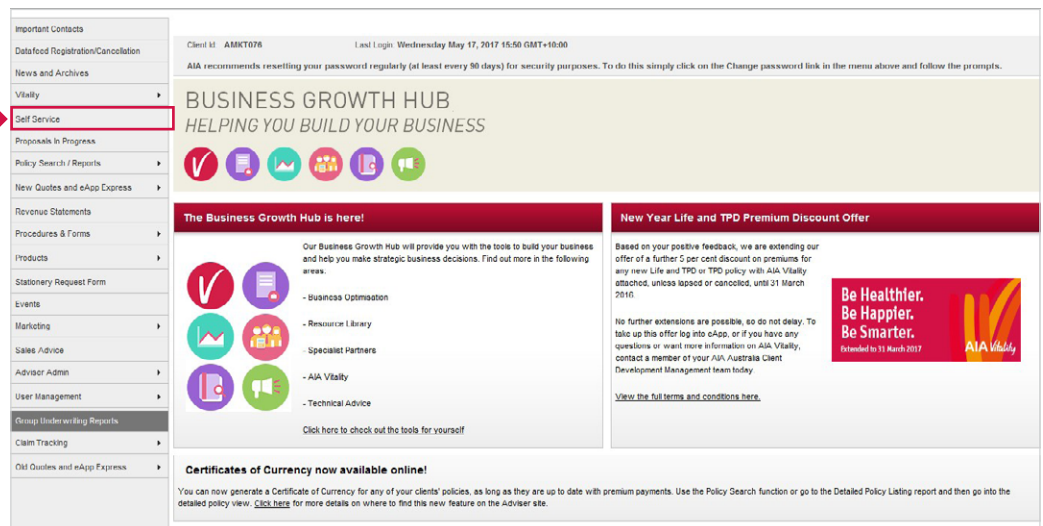


### What will be covered in this guide?

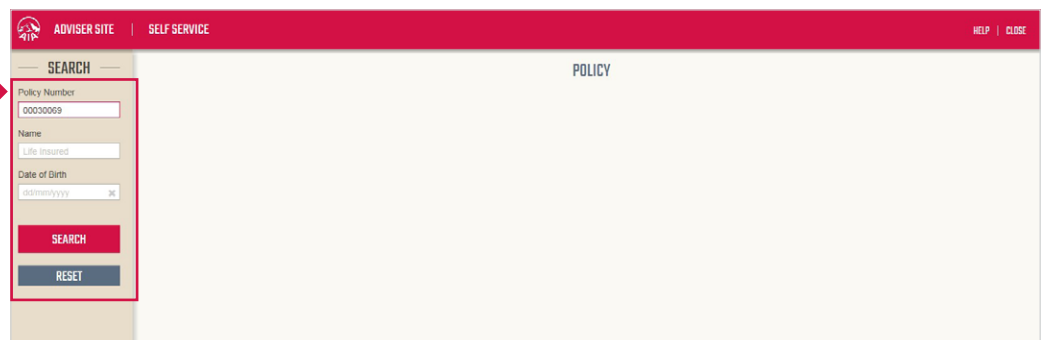
- Logging-in
- Basic navigation
- Logging-out
- Finding Help?

### 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



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



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

**ADVISER SITE | SELF SERVICE** HELP | CLOSE

**SEARCH**

Policy Number: 00030069  
 Name: Life Insured  
 Date of Birth: ddmmyyyy

**SEARCH** **RESET**

**POLICY**

**NO.00030089** X

Product: INCOME PRO Status: ACTIVE **SERVICE REQUEST**  
 Commencement Date: 02/05/2017

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

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

**CURRENT BANK ACCOUNT**  
 BSB No. XXXX87  
 Account No. XXX456

**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 61246965	MR BOB CLARKE	Income Protection	Notified	2017-05-12+10:00
4 61246922	MR BOB CLARKE	Income Protection	Lodging	2017-05-12+10:00

**UPDATE** **HISTORY** **UPDATE** **HISTORY** **Create Claim**

to open eClaims and commence completing the claim

**eClaims**

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

Logged in as \*\*\*\*\*XXXXXXXXXXXX Home **Need Help?** Logout

**Navigation Options**

- Claim Summary**
  - Overview
- Notification and Eligibility**
  - Privacy
  - Eligibility
  - Life Insured Details
  - Claims Contact
  - Claims Details
  - Next Steps
- Lodgement**
  - Claims 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.claim@aci.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 BRISBANE  
 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 portal interface. On the left, there is a 'Navigation Options' pane with a red box highlighting the 'Lodgement' section. The main content area displays 'Claim (#61247623) - Income Protection' with a status of 'Lodging'. Key details include: 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 tabs for 'Questions', 'Answers', and 'Review'. The 'Additional Claim Details' section includes 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 similar to the previous one but highlights the 'Logout' link in the top right corner of the page, next to 'Home' and 'Need Help?' links. The 'Lodgement' section in the navigation pane is also visible, with 'Before You Begin', 'Privacy', and 'Confirm Life Insured Details' marked as completed with green checkmarks.

## 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 is highlighted with a red box. The rest of the interface, including the navigation pane and claim details, remains the same.