

DDO Complaints

How to lodge and submit a Design and Distribution Product Related Complaint in TAC.

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

Design and Distribution Product Related Complaints

As a distributor of TAL Life and TAL Life Insurance Services products, you are required under the Design and Distribution Obligations (DDO) legislation to provide regular reports on complaints relating to product design, product availability, and distribution conditions.

Six-monthly reporting is due 10 business days after the end of the six month periods ending 30 September and 31 March.

To lodge and submit a DDO complaint in TAC:

- 1 Select the **DDO Complaints** tab in the left-hand panel of the home dashboard.

Please note: The DDO Complaints tab can only be accessed when logged-in to TAC using a **Dealer** account.

- 2 Select **Add Row** to create a new entry in the complaints form.

Dashboard | DDO Complaints

DDO Complaints

Design and Distribution Product Related Complaint

As a distributor of TAL Life products you are required under the Design and Distribution Obligations (DDO) legislation to provide regular reports on complaints relating to product design, product availability and distribution conditions.

Six monthly reporting is due 10 business days after the end of the six month periods ending 30 September and 31 March.

Please complete the below form to log a TAL product related complaint.
Complete the below fields and click Save. Saved details can be viewed and edited during the reporting period.

Date Complaint was Received (dd/mm/yyyy)	Policy Number relating to Complaint	Nature of Complaint (please do not include any client sensitive information)	Date Complaint was Referred to TAL (dd/mm/yyyy)	Date Submitted (auto populated once submitted)	Delete
Add Row	Save	Submit			

Once all the complaints have been entered for the reporting period please click **Submit** (submitted entries cannot be edited).

3 Use the **Calendar** icon to record the date the complaint was **received**.

4 Enter the **policy number** which the complaint relates to.

5 Use the text field to detail the nature of the complaint. This text field can be expanded by dragging the bottom right-hand corner. **See 5 A.**

Please note: Do not include any sensitive client information when detailing the nature of the complaint.

6 Use the **Calendar** icon to record the date the complaint was **referred to TAL**.

7 The **Date Submitted** field will be auto-populated when the complaint is submitted. **See 10 C.**

8 To record another complaint entry for the reporting period, select **Add Row**.

Prior to submission, complaint entries can be deleted by selecting the trash icon in the right-hand column. **See 8 A.**

9 Save the logged complaint entries by selecting **Save**.

Saved entries can be viewed, edited, and deleted during the reporting period.

10 To submit **all** recorded complaint entries for the reporting period, select **Submit**.

Please note: Once submitted, complaint entries cannot be edited or deleted. **See 10 B.**

Dashboard | DDO Complaints

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Design and Distribution Product Related Complaint

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Date Complaint was Received (dd/mm/yyyy)	Policy Number relating to Complaint	Nature of Complaint (please do not include any client sensitive information)	Date Complaint was Referred to TAL (dd/mm/yyyy)	Date Submitted (auto populated once submitted)	Delete
12/07/2023			12/07/2023		

Add Row Save Submit

Once all the complaints have been entered for the reporting period please click Submit (submitted entries cannot be edited).

Date Complaint was Received (dd/mm/yyyy)	Policy Number relating to Complaint	Nature of Complaint (please do not include any client sensitive information)	Date Complaint was Referred to TAL (dd/mm/yyyy)	Date Submitted (auto populated once submitted)	Delete
12/07/2023	1234567	Example DDO complaint entry number one.	12/07/2023		
12/07/2023	7654321	Example DDO complaint entry number two.	12/07/2023		
12/07/2023	1234567	Example DDO complaint entry number three.	12/07/2023		
12/07/2023	7654321	Example DDO complaint entry number four.	12/07/2023		
12/07/2023	1234567	Example DDO complaint entry number five.	12/07/2023		

Add Row Save Submit

Once all the complaints have been entered for the reporting period please click Submit (submitted entries cannot be edited).

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12/07/2023	1234567	Example DDO complaint entry number one.	12/07/2023	12/07/2023	
12/07/2023	7654321	Example DDO complaint entry number two.	12/07/2023	12/07/2023	
12/07/2023	1234567	Example DDO complaint entry number three.	12/07/2023	12/07/2023	
12/07/2023	7654321	Example DDO complaint entry number four.	12/07/2023	12/07/2023	
12/07/2023	1234567	Example DDO complaint entry number five.	12/07/2023	12/07/2023	

Add Row Save Submit

Once all the complaints have been entered for the reporting period please click Submit (submitted entries cannot be edited).

For more information, please contact us on the details below:
TAL and Asteron - 1300 286 937 (Monday to Friday 8am - 7pm AEST)
BT Life - 1300 553 764 (Monday to Friday 8am - 6:30pm AEST)

adviser.tal.com.au

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