

# Searching TAC

How to use the TAC search function to find client records, forms and documents, and news articles.

## TAL ADVISER CENTRE QUICK REFERENCE GUIDE

FOR ADVISER USE ONLY

### Client records

To search for a client record:

- 1 Select **Search** from the TAC home dashboard.

OR

Select **Search My Clients and Business** from the left-hand panel.

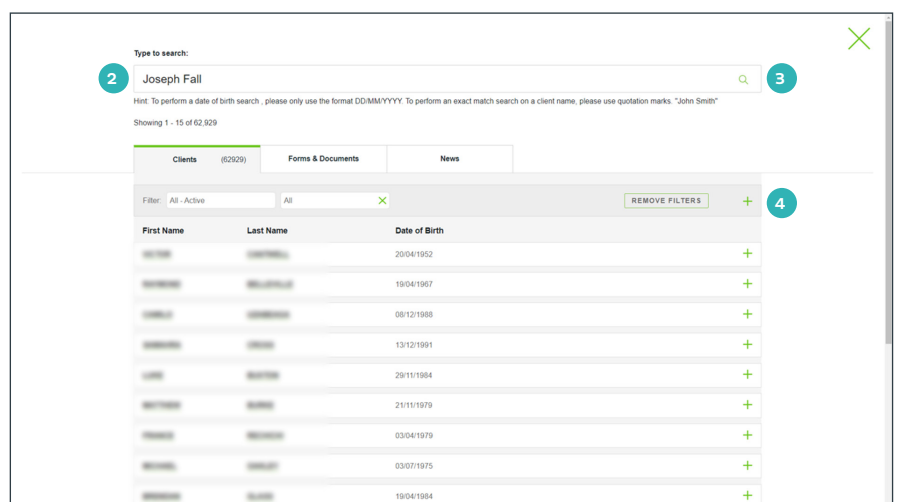
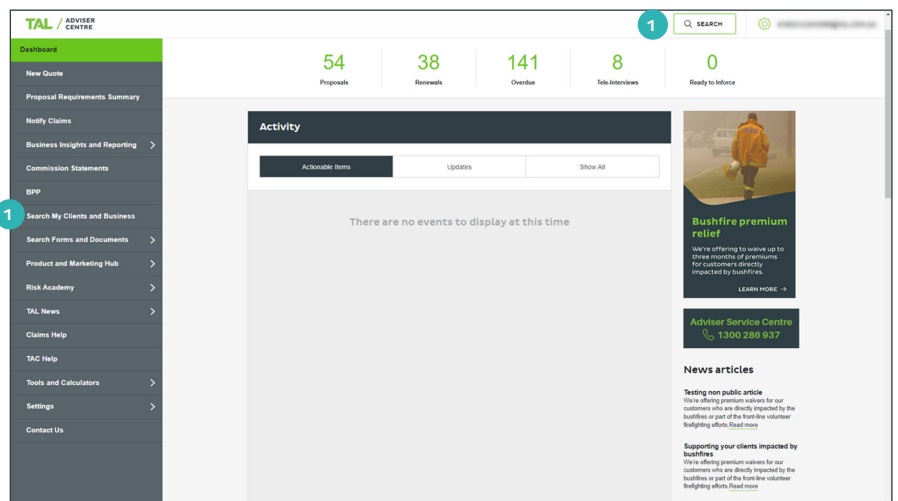
- 2 Enter your search criteria in the search box at the top of the page.

Client records can be searched by:

- Name
- Date of birth
- Quote reference
- Policy number

- 3 Select the **magnifying glass** icon or press return to generate search results.

- 4 Select the **plus (+)** icon to apply filters to the search results.



5 Use the radio buttons to filter by **Category**

AND / OR

6 **Category Status.**

7 Use the drop-down menu to filter results by **date** or **period.**

8 Collapse the filter panel by selecting the **minus (-)** icon to view the filtered search results.

9 Select the **plus (+)** or **minus (-)** icons next to a client record to expand or collapse the high-level overview, including:

- Policy status
- Product name
- Origin (e.g. TAL, BT, Asteron)
- Policy or quote reference number
- Policy or quote sum insured
- Policy or quote premium details

10 Select **View Policy** to open a policy, application, or quote in a new window.

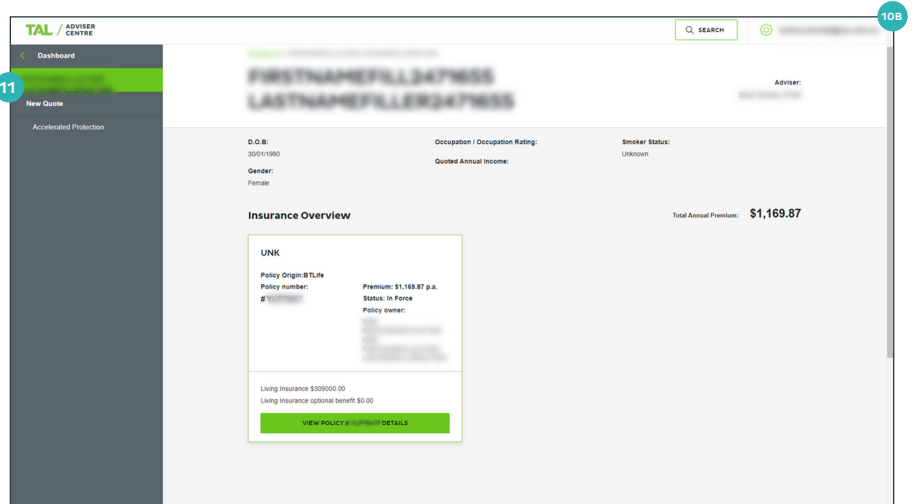
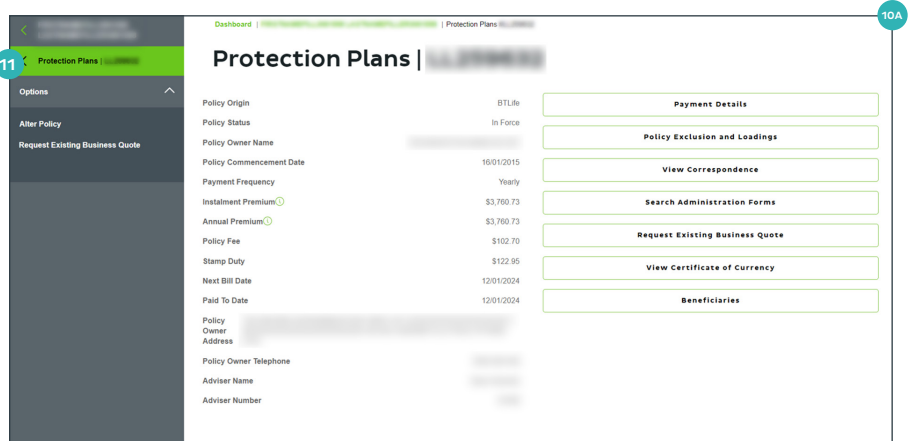
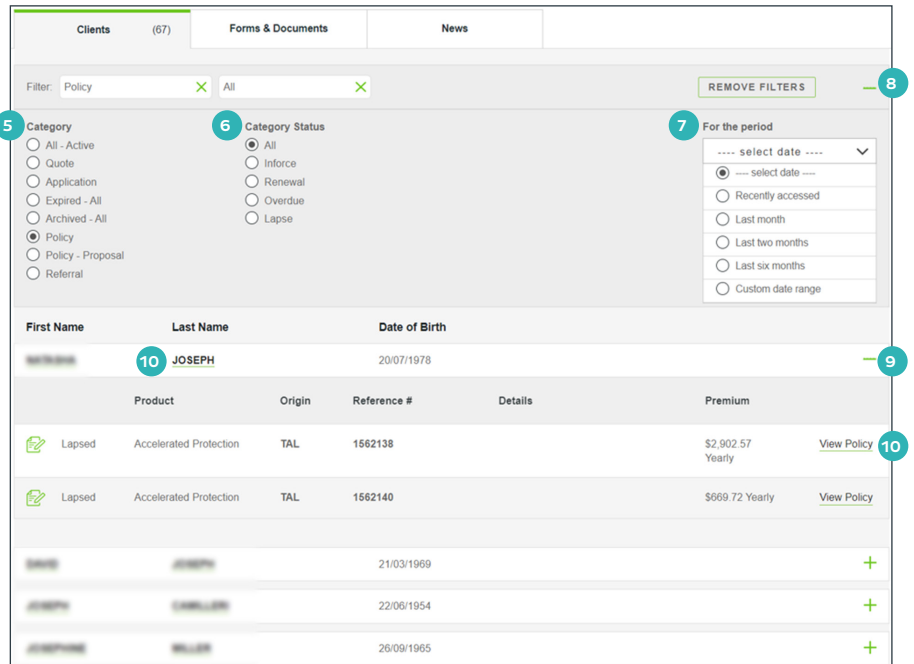
See **10 A.**

OR

Select the client's **first name** or **last name** to open their record in a new window.

See **10 B.**

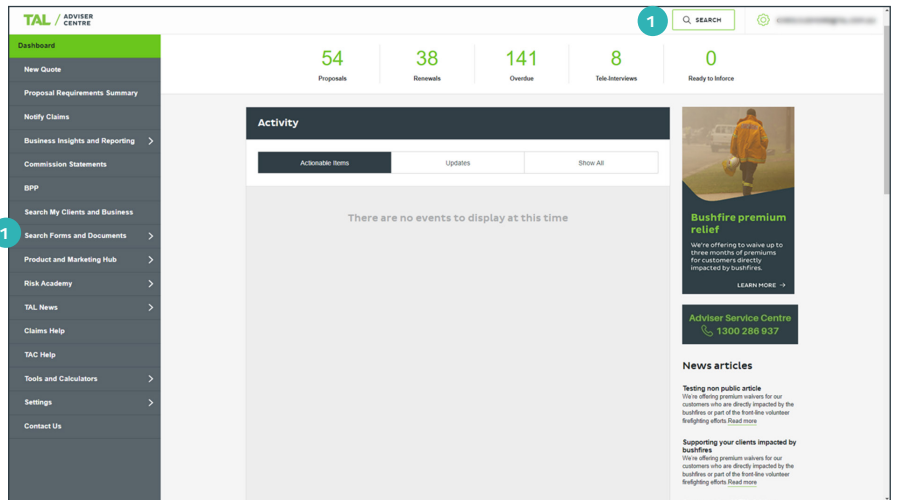
11 Return to the previous screen using the breadcrumbs menu in the left-hand navigation panel.



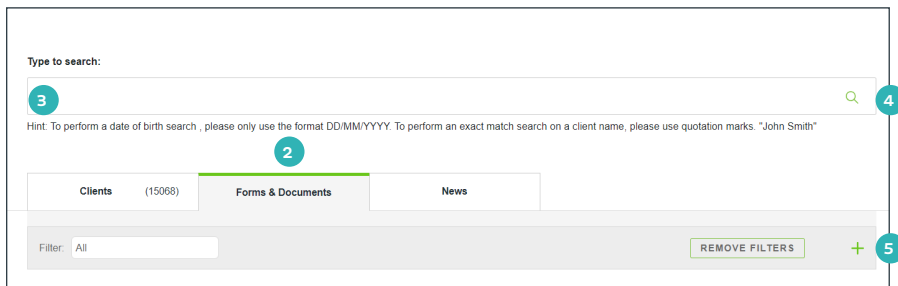
## Forms and documents

To search for a form or document:

- 1 Select **Search** from the TAC home dashboard.
- OR
- 2 Select **Search Forms and Documents** from the left-hand panel.
  - 2 Select the **Forms & Documents** tab (if not currently selected).



- 3 Enter your search criteria in the search box at the top of the page.
- 4 Select the **magnifying glass** icon or press return to generate search results.
- 5 Select the **plus (+)** icon to apply filters to the search results.



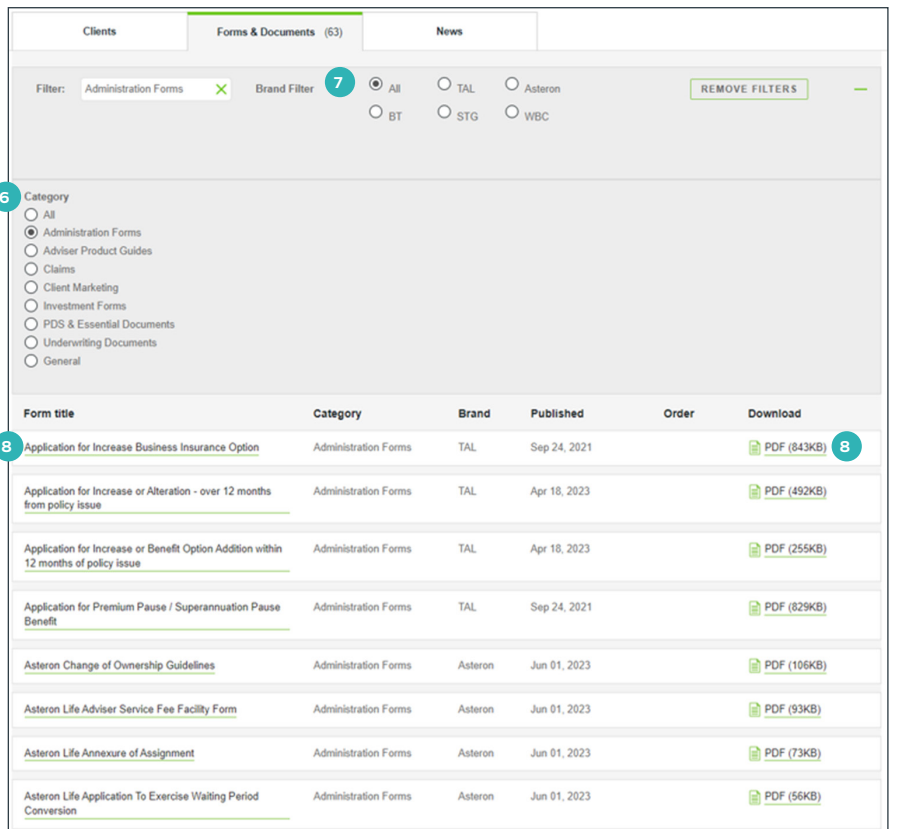
- 6 Use the radio buttons to filter by the following **Category** types:
  - Administration Forms
  - Adviser Product Guides
  - Claims
  - Client Marketing
  - Investment Forms
  - PDS & Essential Documents
  - Underwriting Documents
  - General

- 7 Use the radio buttons to filter by **Brand**.

- 8 Select a **Form title** to download.

OR

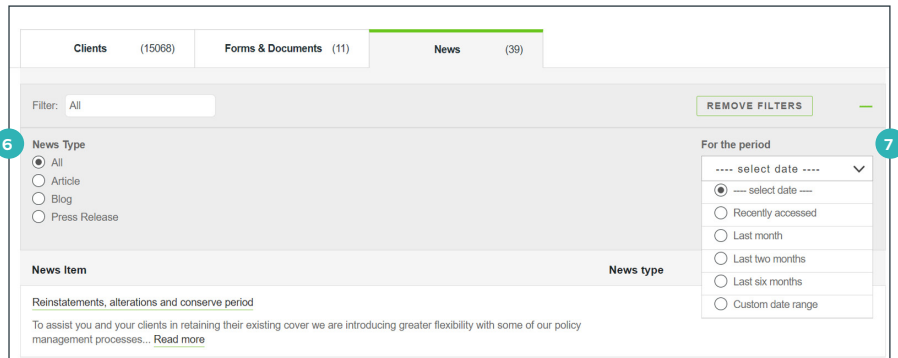
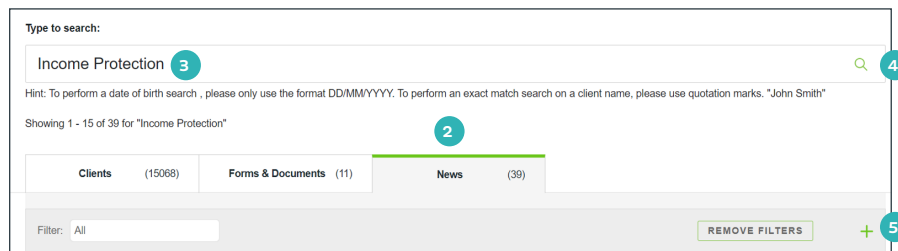
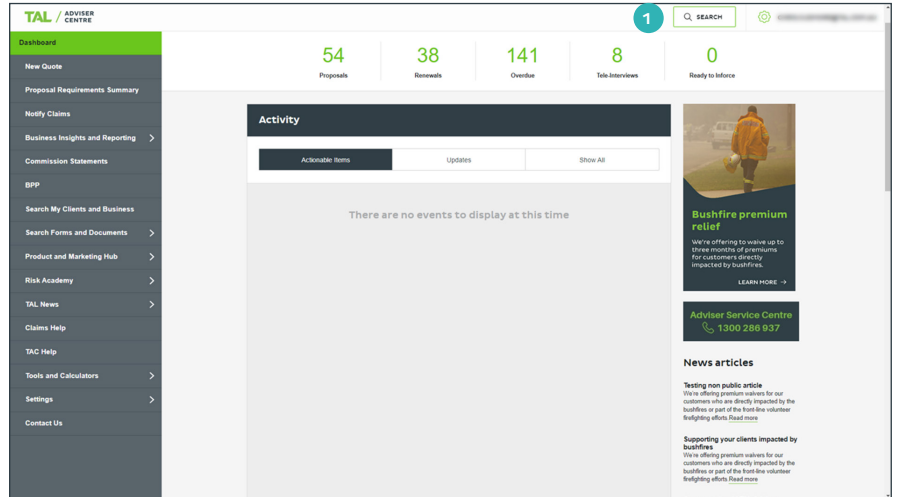
Select the **PDF** icon from the Download column next to the item.



# News

To search for news articles, blog entries, and press releases:

- 1 Select **Search** from the TAC home dashboard.
- 2 Select the **News** tab.
- 3 Enter your search criteria in the search box at the top of the page.
- 4 Select the **magnifying glass** icon or press return to generate search results.
- 5 Select the **plus (+)** icon to apply filters to the search results.
- 6 Use the radio buttons to filter by the following **News** types:
  - Article
  - Blog
  - Press Release
- 7 Use the drop-down menu to filter results by **date** or **period**.
- 8 Select **Read more** to open a news item in a new window.



News Item	News type	Published
<p>Reinstatements, alterations and conserve period</p> <p>To assist you and your clients in retaining their existing cover we are introducing greater flexibility with some of our policy management processes... <a href="#">Read more</a></p>		Apr 19, 2022
<p>Important changes to new Accelerated Protection applications from 20 April 2022</p> <p>As our industry moves forward after a transformative time, we are still just as committed to supporting your business and providing your clients with valuable protection... <a href="#">Read more</a></p>		Apr 11, 2022
<p>Shifting the 'best interests' narrative</p> <p>The industry-wide change program around Income Protection left many financial advisers considering how the new product constructs fit with providing advice that is in the best interests of the client... <a href="#">Read more</a></p>		Mar 17, 2022

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)

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