

Your 2024 Protection Plans Repricing Report

This Quick Reference Guide outlines how to access and run repricing reports for your business.

ADVISER QUICK REFERENCE GUIDE

Accessing and running reports

The reporting section on the TAC allows you to run reports on your business for Protection Plans.

- 1 Access the Business Insights and Reporting section via the left-hand navigation
- 2 On the Business Insights and Reporting page – click on the Reprice Report icon

Business Insights

YOUR ACTION ITEMS			TAL
No. of Policies for review	No. of Policies for review	TAL with coverings	Business Reprice Report for all TAL coverings
1	4	\$0.00	\$169.28K
		TAL without coverings	ET Life Reprice Report for all TAL coverings
		\$203.35K	\$42.13K

TAL Business Insights Reports

Business Insights & Reports

- Address Action Items Report
- Business Overview Report
- Renewal Action Report
- Policy Summary Report
- Labour Report

File Reports

- TAL Your Business Report
- TAL Health Service Plus Report
- TAL Policy Listing
- TAL Reprice Report

Labour Reports

- Adviser Labour Report
- Adviser Reprice Report
- Adviser Policy Listing

ET Life Reports

- ET Life Policy Listing
- ET Life Reprice Report

Navigating the 2024 Protection Plans Reprice Report

Your Reprice Report (uploaded on the 10th of each month) will automatically display on the Business Insights page, and shows all policies being repriced in the upcoming month.

- 1 Reprice Percentage by benefit type is shown in this column
- 2 Reports can be printed, downloaded or viewed as a presentation using these icons

Business Insights

TAL 2024 BT Life Reprice Report Life Insured: [dropdown]

Distributor: Number 1234 Name [dropdown] Adviser Name [dropdown]

Policy Number	Reprice Date	Reprice Increase Percentage	Life Insured	Review Date	Payment Frequency	CPI Flag	Benefit Name	Platform Type	TPD Definition	Brand	Adviser Number	Adviser Name
XXXX00001	27/01/2024	15.70	Customer Name1	27/01/2024	Yearly	Y	TPD		Any	BT	115542	Adviser Name
XXXX00001	20/01/2024	8.00	Customer Name2	20/01/2024	Monthly	Y	TPD		Any	BT	115552	Adviser Name
XXXX00001	20/01/2024	7.00	Customer Name2	20/01/2024	Monthly	Y	Living Plus			BT	115552	Adviser Name

Please note the reprice increase percentages shown are indicative. The data used in this report has been generated for in-force policies only and is accurate as at SEN generation month. The reprice increase outlined does not take into account increases due to Consumer Price Index (CPI) or any age related changes that may apply at the next review date. It will also not reflect any policy or benefit changes that have occurred since this data was generated. Customers should refer to their Renewal Summary for their insurance premium for the upcoming year.

TAL Business Intelligence Reports 1 / 1 2

3 You can also 'Export Data' as a Microsoft Excel file after zooming out of the report:

- 3a Click on the three dots '...'
- 3b Click on 'Export data'
- 3c Click on the 'Export' button
- 3d Check your Downloads folder once you see the 'Successful export' status

Note: Hold 'ctrl' on the keyboard and the minus sign (-) to zoom out of the report.

Business Insights

TAL 2024 BT Life Reprice Report Life Insured: [dropdown]

Distributor: Number 1234 Name [dropdown] Adviser Name [dropdown]

Policy Number	Reprice Date	Reprice Increase Percentage	Life Insured	Review Date	Payment Frequency	CPI Flag	Benefit Name	Platform Type	TPD Definition	Brand	Adviser N.
XXXX00001	20/01/2024	7.00	Customer Name1	20/01/2024	Monthly	Y	Living Plus			BT	115552
XXXX00001	20/01/2024	8.00	Customer Name1	20/01/2024	Monthly	Y	TPD		Any	BT	115552
XXXX00001	27/01/2024	15.70	Customer Name2	27/01/2024	Yearly	Y	TPD		Any	BT	115542

File format: .xlsx (Excel 150,000-row max)

3c Export Cancel

3d Downloads data (4).xlsx [Open file](#)

Successful export
Your data was exported.

IMPORTANT NOTE:

The data used to populate each monthly report is taken approximately **120 days prior to the client's policy review date**. The data is not able to be updated or refreshed throughout the reporting period. This means that any changes that may have been made to these policies after the initial report run date will not be reflected.

Premium alteration quotes to address the premium increase can only be provided from 45 days prior to the client's policy review date.

Running your 2024 Protection Plans Reprice Report

This section displays all your clients' policies.

- 1 You can use the Search functionality to find a Life Insured
- 2 You can also sort the data by:
 - Clicking on the column header,
 - Clicking on the arrow that comes up, and
 - Selecting the 'Sort ascending' or 'Sort descending' option

Business Insights

TAL 2024 BT Life Reprice Report 1 Life Insured

Distributor: Number 1234 Name Adviser Name

Policy Number	Reprice Date	Reprice Increase Percentage	Life Insured	Review Date	Payment Frequency	CPI Flag	Benefit Name	Platform Type	TPD Definition	Brand
XX000001	27/01/2024	15.70	Customer Name1	27/01/2024	Yearly	Y	TPD	Any	Any	BT
XX000001	20/01/2024	8.00	Customer Name2	20/01/2024	Monthly	Y	TPD	Any	Any	BT
XX000001	20/01/2024	7.00	Customer Name2	20/01/2024	Monthly	Y	Living Plus			BT

Policy Number 2

- Export data
- Show as a table
- Spotlight
- Get insights
- Sort descending
- Sort ascending
- Sort by

If you need a hand, call our Service Team on **1300 553 764** between Monday – Friday, 8:00am to 6:30pm (Sydney time) or contact our dedicated support and service teams for any reprice, or service enquiries, inforce policy support and much more using the details in the [Contact page](#) in the [TAC](#).

