

Access and manage your account

All you need to know about logging in to the new TAC and managing your account

TAL ADVISER CENTRE FACT SHEET

When the new TAL Adviser Centre (TAC) launches, users will be able to log in with their current User ID and password. If you haven't updated your password recently, please use the change password feature in this guide. It is generally recommend that passwords are changed at least every 90 days or more frequently if the password has been compromised.

Accessing your account

To access your account settings, either click the cog next to your name and then 'Account Settings', or select 'Settings' in the left-hand navigation. Under your account settings, you can:

- Change your password
- Update your adviser account record with TAL
- Register for your Data Feed
- Set up default product settings
- Manage user access.

Note: Your use of TAC must be consistent with the terms of the Distribution Agreement you have with TAL.



Changing your password

- 1 Change your password by clicking 'Change Password,' or use the 'Change Password' link in the left-hand navigation
- 2 Enter your old and new password. Passwords must include a minimum of eight characters, including lower case letter, capital letter and a number
- 3 Click 'Update' to save.

The screenshot shows the 'Change Password' page in the TAL Adviser Centre. The left-hand navigation menu is visible, with 'Change Password' highlighted. The main content area contains three input fields: 'Old Password:', 'New Password:', and 'Confirm Password:'. A green 'UPDATE' button is located at the bottom right of the form. Numbered callouts 1, 2, and 3 are placed over the navigation menu, the input fields, and the 'UPDATE' button respectively.

Note: There are specific requirements regarding granting and cancelling access to TAC and the use of TAC when inputting data. These are set out in the Terms and Conditions of TAC and can be found at this link: adviser.tal.com.au/terms-and-conditions

Updating your adviser account

Updating your account details in the 'Update My Adviser Account Details' will send a request through to our Adviser Administration team to update your adviser record with TAL

- 1 Enter or update your contact details in the appropriate fields
- 2 Click 'Update' to submit your request.

The screenshot shows the 'Update My Adviser Account Details' page. The form is divided into two main sections: 'Your Contact Details' and 'Business Address'. The 'Your Contact Details' section includes fields for Name, Contact Number, and Email Address. The 'Business Address' section includes fields for Business Phone No., Home Phone No., Fax No., Mobile No., Email Address, Address Line 1, Address Line 2, Suburb, State (a dropdown menu), Postcode, and Country (a dropdown menu). A green 'UPDATE' button is located at the bottom right of the form. Numbered callouts 1 and 2 are placed over the 'Your Contact Details' section and the 'UPDATE' button respectively.

Applying product settings

Under Product Settings, you can pre-populate your preferences for quotes, tele-interviews and applications. These are used as defaults that can be updated in individual quotes as needed.

- 1 The Quote section lets you to set default policy rates, policy types, premium frequency, indexation and premium types for new quotes
- 2 The Benefit Option & Projections section lets you choose certain optional benefits, cover levels and specific benefit and premium projection periods that will be automatically applied to your quotes
- 3 You can opt for tele-interviews to be applied to all applications. Tele-interview updates will appear in the dashboard
- 4 A default commission adviser can be assigned to applications
- 5 Click 'Update' to save your preferences.

Product Settings

Accelerated Protection	Product 2	Product 3	Product 4
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Quote

Policy Type
 Hybrid
 Level

Premium Frequency
 Monthly
 Quarterly
 Half Yearly
 Yearly

Policy Rate (initial)
0%

Policy Rate (ongoing)

Indexation
 On Off

State
VIC

Premium Type
 Stepped
 Level To Age 65
 Level To Age 70

Benefit Options & Projections

Income Protection - Increasing Claims
 On Off

Critical Illness - Level Of Cover
 Standard Premier

Benefit and Premium Projection
5 Years

Tele - interview

Default All Applications
 Yes No

Receive Updates on The Tele-interview Process
 Yes No

Application

Commission Adviser
12345

UPDATE

Managing accounts on the new TAC

We've also introduced flexible account management options with the new TAC, which allows account administrators to add and remove other users within their account.

That means you have more control over who accesses your portfolio and how much information they can see or edit.

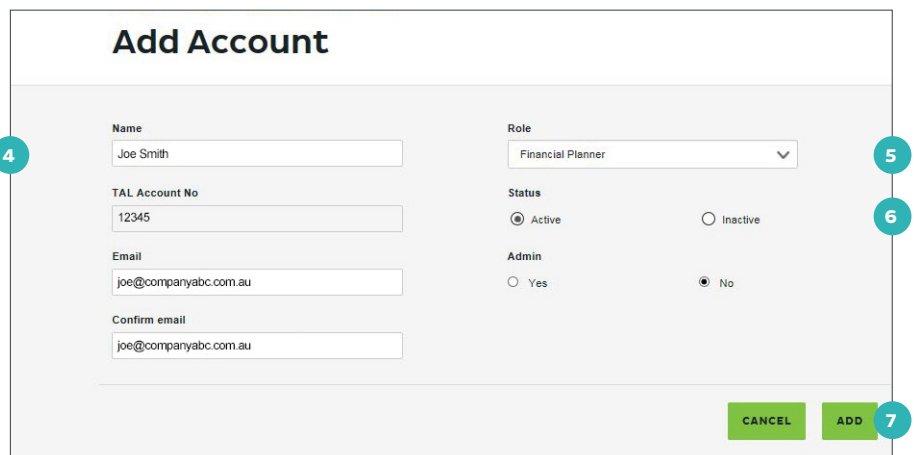
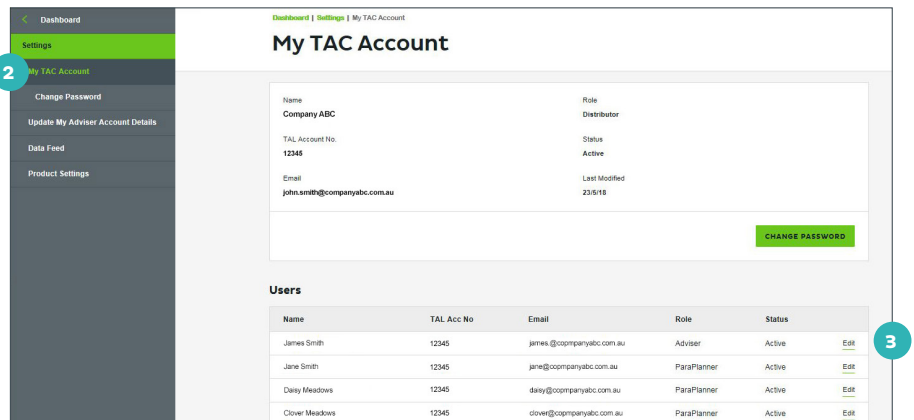
Within the Account Settings section you can:

- Create, maintain and cancel account access
- Assign a role to each additional user
- Create shared access to shared resources (like para-planning).

Note: your dealer group is responsible for granting and cancelling access to TAC, and for keeping records regarding which individual has accessed TAC and input data on behalf of that dealer group. See the TAC Terms and Conditions here: adviser.tal.com.au/terms-and-conditions

Managing accounts: a step by step guide

- 1 Access your account settings by clicking your user name and then 'Account Settings', or selecting 'Settings' in the left-hand navigation
- 2 Click 'My TAC Account' in the left-hand navigation
- 3 Under 'Users', click 'Add new user' or 'Edit'
- 4 Enter their full name and email address
- 5 Add their role
- 6 Set their status. Selecting 'Inactive' will disable a user's access
- 7 Click 'Add' to save a user.



Discover the new TAL Adviser Centre

The TAC gives you a more flexible, efficient and transparent experience, making doing business with TAL that much easier. And we want your transition to the new TAC to be easy as well, so here are some tips to help you access and use the new site.

How do I create accounts for my staff?

You can create and manage staff access via Account Settings. We've created some Quick Reference Guides covering all the new TAC functionality, including how to manage user access. The Guides are available via 'Tools and Calculators' in the left-hand navigation of the new TAC.

What is the difference between active and inactive users?

'Active' users are those that can access on your client records. If you set a user to 'Inactive', they'll no longer be able to see or work with your data.

What do I do if I can't see the correct role for a staff member?

Just select the role that's closest to what your staff member does.

Why should I add users to my account?

You can add users that need access to TAC for business purposes and we expect that this will be limited to those that need to see the data in TAC to perform their roles.

How do I cancel access if a staff member leaves my practice?

In your account settings, navigate to the user record and change the status to 'Inactive.' The record will remain in the system for auditing purposes, but the staff member will no longer be able to log in to your records.

How do I share accounts on the new TAC?

If there are several advisers in your office, support staff can be added to each account so they can access and interact with all your practice's business. Set your users up following the steps above for each account. When they visit the log in screen, they'll have an option to select the adviser account they'd like to access by clicking 'Impersonate adviser.' Remember it's your responsibility to manage user access to your account.

If you need a hand, contact us on **1300 286 937** or via email at acceleratedservice@tal.com.au

adviser.tal.com.au

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The TAL logo consists of the letters 'TAL' in a bold, green, sans-serif font. The 'T' and 'A' are connected, and the 'L' is separate.