Transitioning to the new TAC

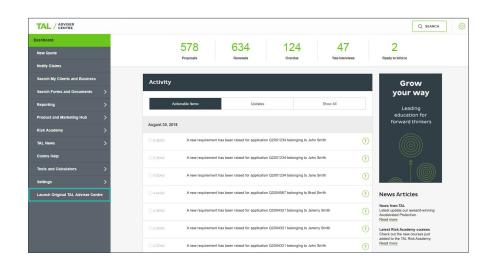
All you need to know about transitioning your business to the new TAL Adviser Centre

TAL ADVISER CENTRE FACT SHEET

When the new TAL Adviser Centre (TAC) launches, you'll still have access to the current version of TAC. We're keeping it online temporarily, so you can progress existing quotes and incomplete applications, check the status of tele-interviews and proposals, provide outstanding requirements and put the policy in force if previously nominated.

Will you continue to be able to access the current version of TAC?

When you log in to the new TAC, the first screen you'll see is the Dashboard. From the left-hand navigation, click 'Launch Original TAL Adviser Centre.' This will automatically open a separate window on your browser. You do not need to log-in again because your log-in credentials are passed through.





What will be available on the current version of TAC?

Apart from a modified look and feel, you will still be able to access your transactions created under PDS dated 1 April 2017, including:

- · New Business Quotes & Illustration PDFs
- Existing Business Quotes & Illustration PDF
- Incomplete Applications & Illustration PDFs
- Submitted Applications & Illustration, Application Summary and where applicable Declaration & Authority or Concurrent Application PDFs
- Applications for Tele-Interview & Illustration, Application Summary and where applicable Declaration & Authority PDFs
- Archive
- · Search my Business:
 - · Search by Reference or Policy Number
 - Proposal Listing and tracking (monitor the progress of applications submitted)
 - Advanced search for Quotes & Applications Tele-interview tracking (monitor the progress of applications submitted for TAL's Tele-Interview Service)
 - · Advanced search for Policies Proposal
- Policy Summary:
 - Details
 - · Requirements Notes & Attachment
 - Policy Commencement (set proposals to in-force)
- TAL Reports:
 - Proposal only
 - PMAR Tracking Polices, view proposals only
- Forms & Documents and Adviser Tools to support the above transactions
- $\boldsymbol{\cdot}$ (Data feeds) Activate Online Registration.

Will I have enough time to complete my existing quotes and applications on the current TAC?

You'll be able to complete your quotes and application on the current version of TAC for 90 days, until 14 January 2019. We'll alert you when the transition period is coming to a close.

There will be 2 transition phases. Transition is the term we are using for the period of time in which you will continue to have access to the current version of TAC to complete in-progress activities and review statuses of previously submitted applications.

- **Phase 1** will be for a period of 90 days and expire on 14 January 2019. During this time you'll be able to continue with transactions under Accelerated Protection PDS dated 1 April 2017. You'll also have access to Existing Business Quotes and Data feed online registration
- **Phase 2** will commence on 15 January 2019. You will still be able to access the current version of TAC to view quote and application data. However you will no longer be able to continue or submit New Business Quotes or Applications.

What won't be available on the current TAC?

You will not be able to:

- Create any further New Business Quotes for PDS dated 1 April 2017
- Convert incomplete Accelerated Protection quotes or applications from the PDS dated 1 April 2017 to the PDS dated 12 October 2018. A new quote and application will need to be created in the new TAC
- Access reporting for in-force policy information or commissions.

Previous functions that can now be found on the new TAC

- · In-force policy data
- Reporting
- · Commission data
- · Sales, marketing and adviser tools
- · Claims information
- · Investments information.

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

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