

Working with client records

This Quick Reference Guide outlines the functionality available under your client records

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

Searching for a client

- 1 From the dashboard, click 'Search'
- 2 You can search by name, quote reference or policy number. Enter the search details and press Enter
- 3 Open a record by clicking on your client's name
- 4 Click the plus or minus symbols to view quote, application or policy records
- 5 The overview panel will show application, quote or policy:
 - Product and status
 - Policy or reference number
 - Sum insured
 - Annualised premium
- 6 Available actions to the right of the record. Click to load the full client record.

The screenshot shows the TAL Adviser Centre dashboard. At the top right, there is a search bar labeled 'Q SEARCH' with a magnifying glass icon. Below this, there are five summary cards: '578 Proposals', '634 Renewals', '124 Overdue', '47 Tele-Interviews', and '2 Ready to Inforce'. Below the summary cards, there is a navigation bar with 'Activity' and 'Grow your way' buttons. The main content area shows a search results page for 'John Smith'. The search bar contains 'John Smith' and a magnifying glass icon. Below the search bar, there is a hint: 'Hint: To perform a date of birth search, please only use the format DD/MM/YYYY. To perform an exact match search on a client name, please use quotation marks. "John Smith"'. Below the hint, it says 'Showing 1 - 1 of 1 for "John Smith"'. There are three tabs: 'Clients (1)', 'Forms & Documents', and 'News'. Below the tabs, there is a filter section with 'Filter: All' and 'All' with a close icon. Below the filter section, there is a table with columns: 'First Name', 'Last Name', 'Date of Birth', 'Product', 'Reference #', 'Details', and 'Premium'. The table has one row: 'John', 'Smith', '01/02/1980', 'In Force', 'Accelerated Protection', '1234567', '\$6,352.02 Income Protection Insurance', 'Annual Premium \$1,986.48', and 'View Policy'. There are numbered callouts 1 through 6 pointing to various elements in the screenshot.

First Name	Last Name	Date of Birth	Product	Reference #	Details	Premium
John	Smith	01/02/1980	In Force	Accelerated Protection	1234567	\$6,352.02 Income Protection Insurance Annual Premium \$1,986.48 View Policy

Viewing client records

Client records will open in a new tab in your browser and allow you to:

- 1 Toggle between quotes, applications and policies via the left-hand navigation
- 2 Review personal details, which mirror those entered in the last quote prepared for the client
- 3 Review the policies the client has via the Insurance Overview section
- 4 View the total annual premium of all in-force policies
- 5 Navigate through to start a new quote
- 6 Resume a quote.

The screenshot shows a user interface for viewing client records. On the left is a navigation menu with items: Quote, Accelerated Protection Q10000288, Policies, Accelerated Protection, New Quote, and Accelerated Protection. The main content area is divided into several sections:

- Personal Details:** D.O.B: 04/09/1975, Occupation / Occupation Rating: Account Executive, Smoker status: Non-Smoker, Gender: Male, Quoted annual income: \$0.00. A note states: "The above information reflects the details provided with the Q100002881 conducted on June 19 2016".
- Insurance Overview:** Total Annual Premium: \$3,091.44. A box for "TAL Accelerated Protection" shows Policy number, Premium: \$3,091.44 p.a., Status: In force, and a list of coverages: Critical Illness Insurance Premier (Attached) \$15.43 per month, Income Protection Plan Standard \$150.88 per month, Life Insurance Plan \$42.95 per month, and TPD Insurance (Attached) \$40.41 per month. A "VIEW POLICY # 1390490 DETAILS" button is present.
- Contact Details (TAL Critical Illness Insurance Premier (Attached) #1390490):** Fields for Address, Telephone, and Email.
- Add a product:** A box for "TAL Accelerated Protection" with a "START NEW QUOTE" button.
- AP Quotes in progress:** A table showing one quote in progress:

Quote	Details	Premium	Link
Quote #1	\$2,000,000.00 Life Cover	Annual Premium	Resume quote

Viewing proposal records

A proposal record is created when an application is successfully submitted. The record includes details of the proposal, and the tools you need to complete it. From the left-hand navigation, you can:

- 1 If you selected the Policy Commencement function in the application, you will be able to put the policy in-force once it is in ready state
- 2 Download requirements for the policy
- 3 View requirements by clicking 'Requirement, Notes and Documents'. You can also upload documentation or notes here.

The screenshot shows a user interface for viewing proposal records. On the left is a navigation menu for "JOHN SMITH" with items: Accelerated Protection | 1234567, Options, Notify a Claim, Put Policy In Force, Downloads, Product Disclosure Statement, and Proposal Requirements. The main content area is titled "Accelerated Protection | 1234567" and includes:

- Policy Details:** Policy status: In force, Policy Owner: Mr. John Smith, Payment Frequency: Monthly, Instalment Premium: \$257.62, Annual Premium: \$3,091.44, Policy Fee: \$112.20, Next premium due date: 22/09/2018, Payment method: Credit Card ending with 791, Card expiry date: 01/21, Adviser name: Adviser Name, Adviser number: 12345.
- Actions:** Buttons for "Generate Policy Summary", "Generate Certificate of Currency", and "Download Product Disclosure Statement".
- Payment Details:** A button labeled "Payment Details".
- Policy Exclusions and Loadings:** A button labeled "Policy Exclusions and Loadings".
- Requirements, Notes and Documents:** A button labeled "Requirements, Notes and Documents".
- View Correspondence:** A button labeled "View Correspondence".
- Notify a Claim:** A button labeled "Notify a Claim".
- Alter Policy:** A button labeled "Alter Policy".
- Insured Party:** Name: Mr. John Smith, Date of Birth: 04/09/1975, Gender: Male, Smoking Status: Unknown, Occupation / Occupation Rating: Qualified Manager/Clerical.
- Contact Details:** Address: PO BOX 123, SYDNEY NSW 2000, Telephone: 0412 123 123, Email: Unknown.

Viewing policy records

The Policy Record page lets you view and export in-force policy information, including:

- 1 Policy details
 - 2 Generating or downloading:
 - Policy Summary
 - Certificate of Currency
 - PDS
- 3 Insured party details
- 4 Cover benefit details including the sum insured, premium and other relevant benefit information
- 5 Quick links to specific information associated to the policy and links to relevant forms to alter the policy or notify a claim as needed.

Dashboard | Accelerated Protection

Accelerated Protection | 1234567

1

Policy status	In force
Policy Owner	Mr. John Smith
Payment Frequency	Monthly
Instalment Premium	\$257.62
Annual Premium	\$3,091.44
Policy Fee	\$112.20
Next premium due date	22/05/2018
Payment method	Credit Card ending with 791
Card expiry date	01/21
Adviser name	Adviser Name
Adviser number	12345

2

[Generate Policy Summary](#)

[Generate Certificate of Currency](#)

[Download Product Disclosure Statement](#)

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Payment Details

Policy Exclusions and Loadings

Requirements, Notes and Documents

View Correspondence

Notify a Claim

Alter Policy

3

Insured Party

Name:	Date of Birth:	Gender:	Smoking Status:	Occupation / Occupation Rating:
Mr. John Smith	4/09/1975	Male	Unknown	Qualified Managerial/Clerical

4

Contact Details

Address:	Telephone:	Email:
PO BOX 123 SYDNEY NSW 2000	0412 123 123	Unknown

4

Critical Illness Insurance Premier (Attached)

Sum Insured	\$52,500
Indexation	Yes
Instalment Premium	\$15.48

Tips and tricks

Use the quick links to access:

- 1 Payment details, including frequency, payment method and premium details
- 2 Policy exclusions and loadings for the life insured
- 3 Requirements, notes and attachments. Notes and attachments can be uploaded here too
- 4 Correspondence, including welcome packs, anniversary notices and tax statements
- 5 Claim notification, which launches an online form where you can let our claims team know to initiate the claim process
- 6 Policy alteration forms.

status	In force	Payment Details	1
Owner	Mr John Smith	Policy Exclusions and Loadings	2
Payment Frequency	Monthly	Requirements, Notes and Documents	3
Monthly Premium	\$257.62	View Correspondence	4
Annual Premium	\$3,091.44	Notify a Claim	5
Fee	\$112.20	Alter Policy	6
Premium due date	22/06/2018		
Payment method	Credit Card ending with 791		
Expiry date	01/21		
Survivor name	Adviser Name		

Current payment method					1
Frequency	Instalment Premium	Next Bill Date	Payer	Payment Method	
Monthly	\$257.62	22/06/2018	MR JOHN SMITH	Credit Card ending with 791 exp: 01/21	

Policy Exclusion and Loading					2
Life No.	Benefit	Percentage Loading	Per Mille Loading	Has Exclusion(s)	
1	Income Protection Plan Standard			Yes	

Notes and Attachments

If there is any additional information that you would like to associate with this policy please add it below.

Note Type New Business Underwriting

Subject

Leave a note

Attached files must be PDF, Word, Excel, XPS, text or image files. Maximum file size is 24 Mb

[Drop files here or browse to upload](#)

Correspondence			4
Correspondence	Type of Doc	Date Requested	

Notify a Claim

Please complete the form below and your query will be forwarded to the appropriate business unit who will respond to you shortly. Alternatively you can contact TAL Retail Claims on 1800 101 016 Monday to Friday between 9am to 5pm (AEST).

Note: The way that TAL collects, uses and discloses your personal and sensitive information is outlined in our [Privacy Policy](#)

Your Contact Details

Please complete your contact details below should we need to contact you regarding the details you have provided.

Name:

Contact Number:

Email Address:

Policy alteration forms					6
Category	Document Name	Size	Published		
Administration Forms	Application for Increase or Alteration.pdf	792.43KB	20/07/2018	Download	
Administration Forms	Application for Increase or Benefit Option Addition - Within 12 months.pdf	851.05KB	20/07/2018	Download	
Administration Forms	Beneficiary Nomination Ordinary.pdf	512.51KB	20/07/2018	Download	
Administration Forms	Beneficiary Nomination Ordinary.pdf	512.51KB	20/07/2018	Download	

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

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