

Managing Suspense

This Quick Reference Guide outlines how to manage suspense online and access faster turnaround times

TAL ADVISER CENTRE QUICK REFERENCE GUIDE

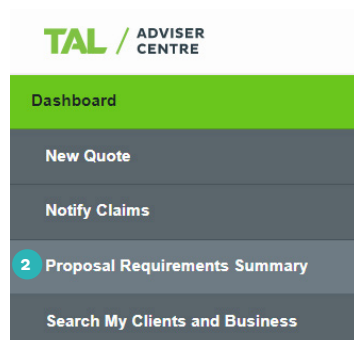
Viewing requirements, adding notes and attachments to a policy on the TAL Adviser Centre.

You can view or submit requirements or additional information online instead of having to email, fax or mail the documents to us. It means you can access faster turnarounds and helps you streamline back office processing.

How does it work?

To view requirements OR add notes OR attach documents:

- 1 Login to the TAL Adviser Centre.
- 2 Using the navigation panel on the left Select Proposal Requirement summary.
- 3 A list of all outstanding clients currently in proposal will be displayed.
- 4 Click the comments section to expand text requirements.
- 5 Status is colour coded to assist with navigation:
 - Green:** Completed requirements that will display as Withdrawn or Actioned.
 - Blue:** A note or discussion point that doesn't require to be actioned eg: Rollover requested.
 - Red:** An outstanding requirement that can be actioned. This can include items waiting for a reports or medicals.
- 6 Actioning outstanding requirements is quick and efficient. Simply click the Policy number to navigate through to the Requirements, notes and documents section of a client's policy.



Dashboard | Proposal Requirements Summary

EXPAND COMMENTS (4) PRINT

Life Insured	Policy Number	Days Open	Req ID	Description	Comments	Status	Requested Date	Received Date
Example Client	1888822	7	3393030	Invalid TFN	We require your clients Tax File Number.	Pending Response (5)	10/8/2021	
Example Client	1814423 (6)	705	3096122	Invalid TFN	We require your clients Tax File Number.	Withdrawn (5)	19/9/2019	
		705	3097093	Await File	TAL training	Pending Response (5)	14/9/2019	
		705	3138995	Health Q	We require completion of the Health Questionnaire. You will find the Health Declaration questionnaire on the on-line TAL Adviser Centre.	Pending Response (5)	23/12/2019	
		705	3174046	Personal Statement	We require completion of a new application form. You will find the Application form on the on-line TAL Adviser Centre.	Pending Response (5)	22/3/2020	
Example Client	1814417 (3)	705	3096144	Additional Information Re...	The client disclosed a history of back pain on a previous application, please arrange for completion of a back/neck pain questionnaire.	Actioned (5)	23/9/2019	10/12/2019
		705	3096145	Stress Q	Please arrange for your client to complete the Depression/Nervous Disorder Questionnaire. You will find the Depression, Anxiety, Stress, Chronic Fatigue and other Nervous Condition questionnaire on the on-line TAL Adviser Centre.	Pending Response (5)	23/9/2019	
		705	3096146	POI Employed	We require: For AAA and AA+ occupation...	Actioned (5)	23/9/2019	06/2/2020
		705	3138997	Health Q	We require completion of the Health Questionnaire. You will find the Health Declaration questionnaire on the on-line TAL Adviser Centre.	Actioned (5)	23/12/2019	10/12/2020
		705	3174044	Personal Statement	We require completion of a new application form. You will find the Application form on the on-line TAL Adviser Centre.	Pending Response (5)	22/3/2020	
Example Client	1814417	705	3095999	Invalid TFN	We require your clients Tax File Number.	Withdrawn (5)	23/9/2019	



A new tab will open, view the requirements, add notes or attach documents to each one as needed.

- 7 Select the UPLOAD button to save the details.

When you have selected UPLOAD a notification will automatically be sent to our team.

- 8 You will see it in the notes section on the screen which will display the status of the requirement.

Notes & Documents for policy

Requirements

Requirement	Requirement ID	Request Date	Status	
Payment Advice - DDR or CC	3028545	20/02/2019	TAL Reviewing	+
Additional Information Required	3028833	21/02/2019	Pending Response	+
Adviser Information	3028834	21/02/2019	Pending Response	+

Note	Attachment	Created	Created By
There are no notes or attachments to display			

Notes and Attachments 8

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

CANCEL

UPLOAD 7

If you have miscellaneous information you would like to provide to TAL click either the “New Business” or “Underwriting” option, add the information and click “UPLOAD”.

All details will be displayed here for future reference so you will have an audit history of the information you’ve provided to TAL.

Notes and documents are created at client level and can be added during the application or at any time the policy is in proposal status, you can add as many notes or documents as you require.

This is not to be used for policy enquiries.

Frequently Asked Questions

1. What should I do if the same requirement is outstanding for multiple policies?

You can upload the file once as an attachment to one of the policy requirements, and add a note to the other policy requirement, referencing that the requirement has been uploaded as an attachment to the other policy number.

2. What if I want to query the status of a policy application – can I request this by attaching a note?

This process is designed to provide information for requirements only. If you want to enquire on where a policy is up to, please check your policies in Proposal on TAL Adviser Centre.

3. What file types can I upload?

You can upload Word, PDF, Excel, XPS, text and image (bmp, tiff, jpeg and png) files. If you're using Internet Explorer 8 or 9 you may have restrictions uploading some image files (except jpeg). You can convert the image files to jpeg or upgrade to Internet Explorer 10. When uploading Excel files they will be scanned as they would print. We unfortunately are unable to accept zip files.

4. Are there any restrictions on the upload file size?

Yes. The total size of a single file or multiple files in the same 'Send' transaction cannot exceed 24MB. If a single file or combined files exceed 24MB, you will receive an error message and won't be able to upload the file/s.

For a single file –split the file into two smaller files and submit separately. The first as an attachment to the relevant requirement, and the second as additional information (make sure you quote the relevant Requirement ID). Alternatively, you can email the large file directly to us. Please note that you will receive a system block notification due to the large file size. We will organise for the file to be scanned to the policy and confirm once this is completed.

For multiple files –submit files up to 24MB as an attachment to the relevant requirement. Submit the remaining files as additional information (make sure you quote the relevant Requirement ID).

5. What do I do if I attach the wrong document to a policy?

Before clicking send, select the incorrect document (by clicking on the box to the left of the item) and then click 'Delete'. Note, once the attachment has been sent, you cannot delete the document.

6. What happens if I attach and send an incorrect document?

If you attach and send an incorrect document, please contact us so we can remove the incorrect document. Please check to ensure the correct documents, ie. only documents relating to that particular policy, are attached before clicking 'Send'. If an error is made, a new requirement will be raised for the same item.

7. Can I submit requirements for different policies/clients in the one 'Send'?

No. To assist with ensuring the accuracy and efficiency of the new process, you and your staff need to check that the information you submit via TAL Adviser Centre is complete and accurate.

Eg. if you provide a payment advice for Jane Brown in the same attachment as a health declaration for Fred Smith, the payment advice for Jane Brown won't be marked off as received in TAL Adviser Centre, and TAL will need to remove the payment advice from Fred Smith's file to ensure Jane Brown's privacy is protected.

8. Why aren't all the files I uploaded appearing under Sent Notes and Attachments, even after I've clicked 'Send'?

If you sent multiple documents at the same time for a requirement, they will be consolidated into a single PDF under 'Sent Notes and Attachments'. Please note that it does not matter what order you upload the documents, as long as they are submitted at the same time, they will be sorted to ensure all notes are displayed before any attachments in the PDF.

9. How long will it take for the documents to reach TAL?

Depending on the size of file submitted it may take approximately 5 to 15 minutes for TAL to receive the file.

10. I've attached notes and attachments. Why aren't they appearing under Sent Notes and Attachments?

The documents may still be sitting under 'Unsent Notes and Attachments'. After uploading any notes and attachments, you must click the 'Send' button. They will then move to the 'Sent Notes and Attachments' section.

11. Will I be able to view submitted requirement documents indefinitely through TAL Adviser Centre?

Once a policy is in force, you'll no longer be able to view the uploaded notes or attachments. Once a policy is in force, please contact us if you would like to see the documents on file. We will provide you with a copy as per our current privacy guidelines.

For more information, contact your TAL sales team or our Adviser Service Centre on **1300 286 937** (Monday to Friday 8am – 7pm AEST) or via email at **acceleratedservices@tal.com.au**

adviser.tal.com.au

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The data is for illustrative purposes only.

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