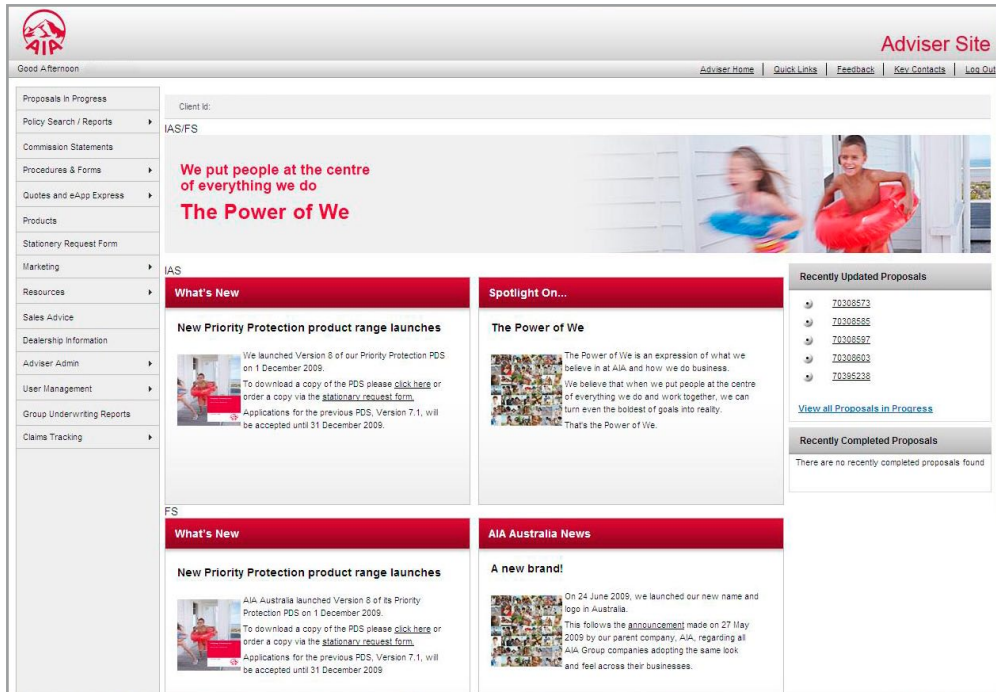


Claims Tracking User Guide

Version 1.0, Issued March 2010

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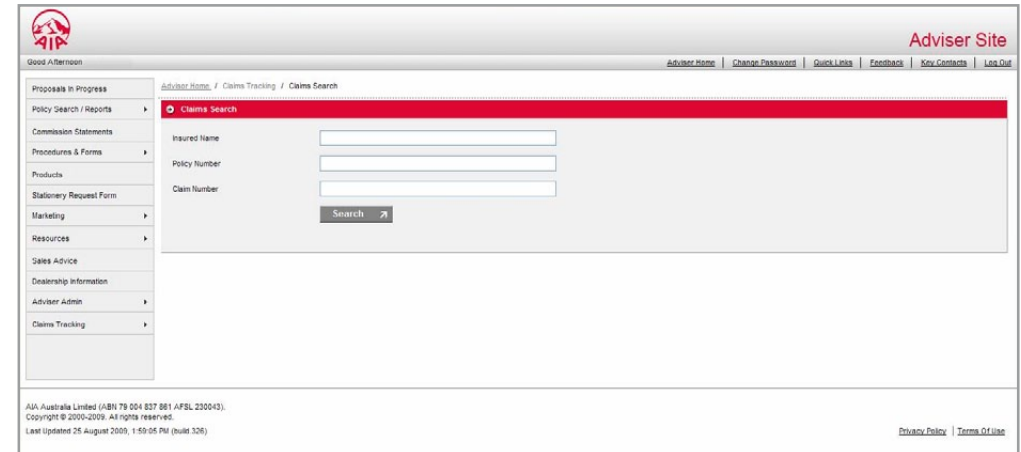




Adviser home page

To navigate to the Claims Tracking, click on Claims from the left hand menu. There are four options to choose from:

- Open Claims – claims that are under assessment
- Closed Claims – claims that have been finalised
- Declined Claims – claims that have been declined
- Claims Search – use this function to search for a specific claim using Insured Name, Policy Number or Claim Number



Claims Search

The search function can be used to find a specific claim quickly by searching using Insured Name, Policy Number or Claim Number. Enter the required information and click search.

Claim No.	Benefit Type	Policy Number	Insured Name	DOB	Gender	Date Claim Submitted	Sum Insured(\$)	Status	Claim Decision	Last Action Date	Closed Date	Adviser Code	Memos	Requirements	Payments
	Waiver of Premium			13/08/1951	MALE	28/10/1999	135200.00	Assessed	Approved	07/02/2001	-	N/A	N/A	Requirements	Payments
	Income Protection			24/05/1954	MALE	10/11/2009	800.00	Assessment Pending	Approved	10/11/2009	-	N/A	N/A	N/A	N/A
	Income Protection			25/12/1948	MALE	12/08/2008	1500.00	Assessed	Approved	18/08/2008	-	N/A	N/A	Requirements	Payments
	Income Protection			28/01/1982	MALE	12/09/2007	4900.00	Assessed	Approved	20/09/2007	-	N/A	N/A	Requirements	Payments
	Income Protection			24/05/1954	MALE	10/11/2009	800.00	Assessment Pending	Approved	10/11/2009	-	N/A	N/A	N/A	N/A
	Waiver of Premium			01/02/1955	FEMALE	29/11/1990	978.40	Assessed	Approved	13/01/2005	-	N/A	N/A	Requirements	Payments
	Waiver of Premium			28/04/1951	MALE	04/11/1990	932.80	Assessed	Approved	10/06/1999	-	N/A	N/A	Requirements	Payments
	Crisis Recovery			28/12/1951	FEMALE	20/11/2009	10000.00	Under Assessment	Approved	30/11/2009	-	N/A	N/A	Requirements	N/A
	Waiver of Premium			22/05/1950	FEMALE	22/05/2001	2378.60	Assessed	Approved	09/11/2001	-	N/A	N/A	Requirements	Payments
	Waiver of Premium			26/12/1959	MALE	01/09/2009	877.70	Under Assessment	Approved	09/09/2009	-	N/A	N/A	Requirements	N/A

Open Claims

The open claims section enables you to view claims that are currently under assessment. You can check the status of the claim, if there are any outstanding requirements that we require and the notes on the file made by the claims assessor. To view further information on another page, click on the underlined words. For example, to view outstanding requirements, click on the word **Requirements** for the claim you wish to view.

Requested Date	Type	Details	Next Followup	Last Comments	Status	Last Modified Date
12/05/2008	Other	N/A	20/03/2010	N/A	FOLLOWED UP (1)	13/03/2009

Outstanding Requirements

Once you have clicked on **Requirements** on the Open Claims page, you will be taken to a new window where you can view the outstanding requirements for the claim. In this case a Supplementary Report Form is required. You can see the date it was requested and when we will follow up if the requirement isn't received.

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Commission Statements | Claim Number, Policy Number, Insured Name, Insured Amount, Adviser Code, Benefit Type, Claim Status, Occupation, Date Claim Submitted

Procedure & Forms | **Payments**

Release Date	Benefit Type	Amount	From	To	Type	Reversed
20/11/2009	Income Protection	\$1224.14	01/10/2009	31/10/2009	payment	No
22/10/2009	Income Protection	\$1520.00	01/09/2009	30/09/2009	payment	No
21/09/2009	Income Protection	\$1163.85	01/08/2009	31/08/2009	payment	No
27/08/2009	Income Protection	\$1327.71	01/07/2009	31/07/2009	payment	No
15/07/2009	Income Protection	\$1280.55	01/06/2009	30/06/2009	payment	No
23/06/2009	Income Protection	\$1230.55	01/05/2009	31/05/2009	payment	No
21/05/2009	Income Protection	\$1012.32	01/04/2009	30/04/2009	payment	No
25/04/2009	Income Protection	\$718.34	01/03/2009	31/03/2009	payment	No
16/03/2009	Income Protection	\$487.45	30/01/2009	28/02/2009	payment	No
16/02/2009	Income Protection	\$1001.43	30/12/2008	28/01/2009	payment	No

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Payment Information

Once you have clicked on **Payments** on the Open Claims page, you will be taken to a new window where you can view the payments that have been made to your client. You can see the amount that has been paid and the period that the payment is relevant to.

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Commission Statements | **Closed Claims**

Procedure & Forms | Claim No., Benefit Type, Policy Number, Insured Name, DOB, Gender, Date Claim Submitted, Sum Insured(\$), Status, Claim Decision, Last Action Date, Closed Date, Adviser Code, Memos, Requirements, Payments

Claim No.	Benefit Type	Policy Number	Insured Name	DOB	Gender	Date Claim Submitted	Sum Insured(\$)	Status	Claim Decision	Last Action Date	Closed Date	Adviser Code	Memos	Requirements	Payments
	Death Benefit			19/08/1951	MALE	24/05/1999	230000.00	Closed	Approved	07/02/2000	07/02/2000	N/A	N/A	N/A	Payments
	Death Benefit			25/10/1951	FEMALE	13/08/2009	253000.00	Closed	Approved	07/08/2009	07/08/2009	N/A	N/A	N/A	Payments
	Whole of Life & Endowment			13/08/1920	MALE	13/08/2002	10000.00	Closed	Approved	25/09/2002	25/09/2002	N/A	N/A	N/A	Payments
	Death Benefit			29/04/1947	MALE	26/08/2009	50000.00	Closed	Approved	03/09/2009	03/09/2009	N/A	N/A	N/A	Payments
	Death Benefit			29/02/1944	MALE	17/04/1997	10000.00	Closed	Approved	30/05/1997	N/A	N/A	N/A	N/A	Payments
	Death Benefit			04/07/1958	MALE	29/04/1994	10000.00	Closed	Approved	15/01/1997	15/01/1997	N/A	N/A	N/A	Payments
	Total & Permanent Disability			08/12/1941	FEMALE	30/10/2000	30000.00	Closed	Declined	22/02/2001	22/02/2001	N/A	N/A	N/A	N/A
	Death Benefit			29/02/1944	MALE	17/04/1997	10000.00	Closed	Approved	30/05/1997	30/05/1997	N/A	N/A	N/A	Payments
	Death Benefit			04/10/1945	FEMALE	23/05/2004	37500.00	Closed	Approved	24/05/2004	24/05/2004	N/A	N/A	N/A	Payments
	Death Benefit			04/01/1942	MALE	20/11/1998	20000.00	Closed	Approved	20/02/1999	20/02/1999	N/A	N/A	N/A	Payments

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Closed Claims

This section enables you to view information relating to finalised claims including when the claim was closed and the payments made to your client.

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Proposals In Progress | [Adviser Home](#) / [Claims Tracking](#) / [Declined Claims](#)

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Commission Statements | **Declined Claims**

Procedure & Forms | Claim No., Benefit Type, Policy Number, Insured Name, DOB, Gender, Date Claim Submitted, Sum Insured(\$), Status, Claim Decision, Last Action Date, Closed Date, Adviser Code, Memos, Requirements, Payments

Claim No.	Benefit Type	Policy Number	Insured Name	DOB	Gender	Date Claim Submitted	Sum Insured(\$)	Status	Claim Decision	Last Action Date	Closed Date	Adviser Code	Memos	Requirements	Payments
	Total & Permanent Disability			08/12/1941	FEMALE	30/10/2000	30000.00	Closed	Declined	22/02/2001	22/02/2001	N/A	N/A	N/A	N/A
	Death Benefit			31/12/1929	MALE	19/07/2004	250000.00	Closed	Declined	19/07/2004	19/07/2004	N/A	N/A	N/A	N/A
	Income Protection			12/10/1941	MALE	20/08/2000	900.00	Closed	Declined	30/08/2000	30/08/2000	N/A	N/A	N/A	N/A
	Income Protection			12/10/1941	MALE	20/08/2000	900.00	Closed	Declined	30/08/2000	30/08/2000	N/A	N/A	N/A	N/A
	Income Protection			25/08/1949	MALE	13/12/2000	17850.00	Closed	Declined	03/01/2001	03/01/2001	N/A	N/A	N/A	N/A
	Income Protection			25/08/1949	MALE	13/12/2000	7500.00	Closed	Declined	03/01/2001	03/01/2001	N/A	N/A	N/A	N/A
	Crisis Recovery			28/01/1959	MALE	02/01/2004	100000.00	Closed	Declined	02/01/2004	02/01/2004	N/A	N/A	N/A	N/A
	Waiver of Premium			07/07/1955	FEMALE	01/03/2000	20000.00	Closed	Declined	01/03/2000	01/03/2000	N/A	N/A	N/A	N/A
	Waiver of Premium			10/11/1949	MALE	10/03/2001	1900.70	Closed	Declined	24/03/2001	24/03/2001	N/A	N/A	N/A	N/A
	Crisis Recovery			09/05/1954	FEMALE	13/10/2008	20000.00	Closed	Declined	27/10/2008	27/10/2008	N/A	N/A	N/A	N/A

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Declined Claims

This section enables you to view information relating to declined claims including when the claim was closed and the date this was actioned.

