

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.

The screenshot displays the TAL Adviser Centre dashboard. On the left is a dark navigation menu with the following items: Dashboard (highlighted in green), New Quote, Notify Claims, Search My Clients and Business, Search Forms and Documents, Reporting, Product and Marketing Hub, Risk Academy, TAL News, Claims Help, Tools and Calculators, Settings, and Launch Original TAL Adviser Centre (highlighted with a red box). The main dashboard area features a top navigation bar with a search icon and a user profile icon. Below this is a summary section with five cards: Proposals (578), Renewals (634), Overdue (124), Tele-Interviews (47), and Ready to Inforce (2). The central 'Activity' section has tabs for 'Actionable Items', 'Updates', and 'Show All'. The 'Actionable Items' tab is active, showing a list of items dated August 30, 2018. Each item is a notification: 'A new requirement has been raised for application Q2001234 belonging to John Smith' (repeated three times) and 'A new requirement has been raised for application Q2004567 belonging to Brad Smith'. To the right of the activity feed is a 'Grow your way' section with a graphic and the text 'Leading education for forward thinkers'. Below that is a 'News Articles' section with two items: 'News from TAL: Latest update our award-winning Accelerated Protection. Read more' and 'Latest Risk Academy courses: Check out the new courses just added to the TAL Risk Academy. Read more'.

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
- (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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