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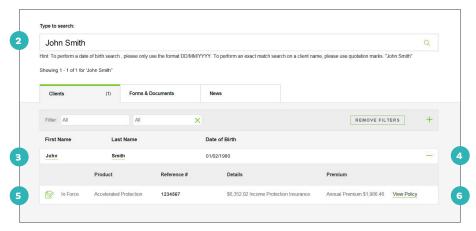
This Quick Reference Guide outlines the functionality available under your client records

**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.

1

578	634	124	47	2
Proposals	Renewals	Overdue	Tele-Interviews	Ready to Inforce

Activity

Actionable Items | Updates | Show All

Grow your way

Type to search:

2 John Smith

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"

Showing 1 - 1 of 1 for 'John Smith'

Clients	(1)	Forms & Documents	News

Filter: All | All | REMOVE FILTERS +

First Name	Last Name	Date of Birth		
3 John	Smith	01/02/1980		**4** —

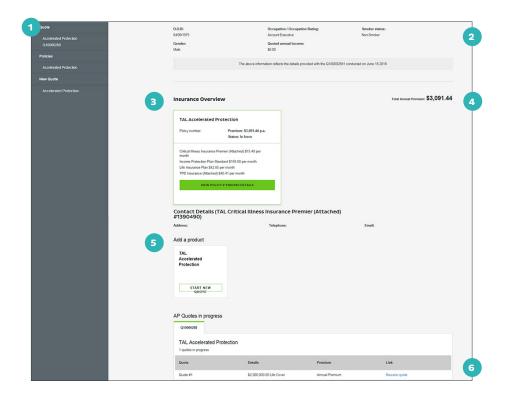|	Product	Reference #	Details	Premium	
5 In Force	Accelerated Protection	1234567	$6,352.02 Income Protection Insurance	Annual Premium $1,986.48	View Policy **6**

TAL / ADVISER CENTRE

Viewing client records

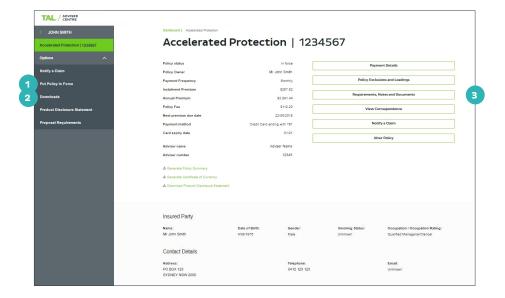Client records will open in a new tab in your browser and allow you to:

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.

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:
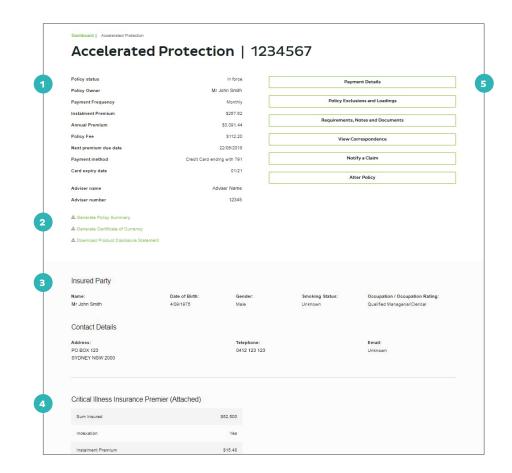
1 If you selected the Policy Commencement function in the application, you will be able to put the policy in-force once it is in ready state

2 Download requirements for the policy

3 View requirements by clicking 'Requirement, Notes and Documents'. You can also upload documentation or notes here.

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	22/06/2018
Payment method	Credit Card ending with 791
Card expiry date	01/21
Adviser name	Adviser Name
Adviser number	12345

5

- Payment Details
- Policy Exclusions and Loadings
- Requirements, Notes and Documents
- View Correspondence
- Notify a Claim
- Alter Policy

2

⬇ Generate Policy Summary
⬇ Generate Certificate of Currency
⬇ Download Product Disclosure Statement

3 Insured Party

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

Contact Details

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

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
Owner	Mr John Smith
ent Frequency	Monthly
ent Premium	$257.62
al Premium	$3,091.44
Fee	$112.20
remium due date	22/06/2018
ent method	Credit Card ending with 791
expiry date	01/21
er name	Adviser Name

1 Payment Details
2 Policy Exclusions and Loadings
3 Requirements, Notes and Documents
4 View Correspondence
5 Notify a Claim
6 Alter Policy

Current payment method

Frequency	Installment Premium	Next Bill Date	Payer	Payment Method
Monthly	$257.62	22/06/2018	MR JOHN SMITH	Credit Card ending with 791 exp: 01/21

1

Policy Exclusion and Loading

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

2

Notes and Attachments

If there is any additional information that you would like to associate with this plicy 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

3

Correspondence

Correspondence	Type of Doc	Date Requested

4

Notify a Claim

Please complete the form below and your query will be forwarded to the appropriate business unit who will response 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:

5

Policy alteration forms

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	651.05KB	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

6

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

adviser.tal.com.au

TAL