



VUE - Representative Management System (RMS)

User Guide

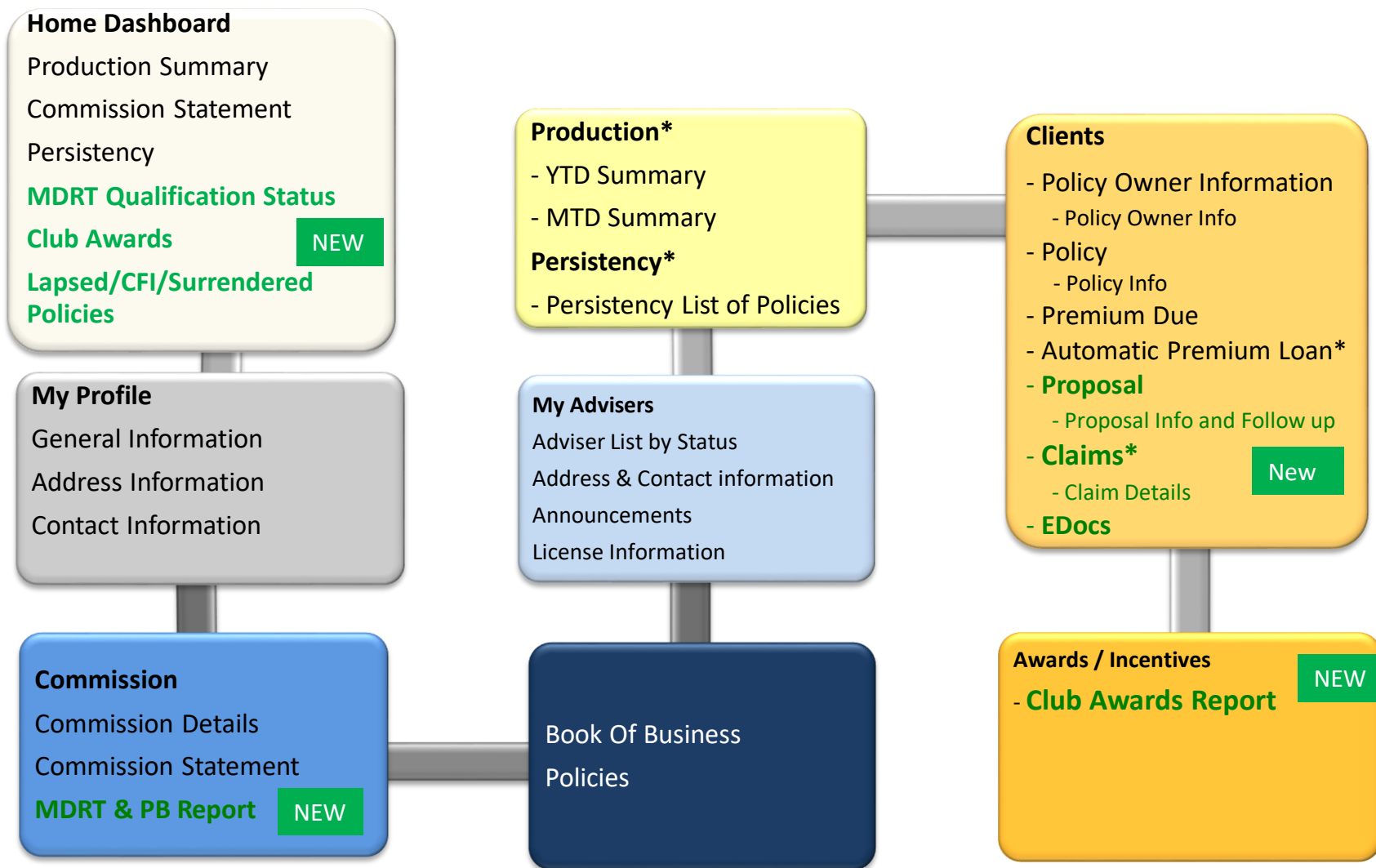
Updated as at 11 August 2020

- What is VUE RMS Portal
- How to login
- Details of Main Modules
- Contact parties

What is VUE RMS Portal?

- VUE RMS Portal is an online portal which enables Advisers to view and download all commission statements and Production report.
- VUE RMS Portal can be accessed anywhere with an internet connection.
- It contains details of all insurance, investment, fees, production and referrals transactions which have been paid to the Adviser.
- For Managers and Directors, they will be able to view all their Advisers' commission which have been paid to them and production contributed.
- Commission will only contain information on incepted and successfully transacted cases whereby commission has been paid.
- Commission statements can be downloaded from VUE RMS Portal the day after commission run has been completed. i.e. 29th of every month.
- Production reports can be viewed and downloaded everyday.

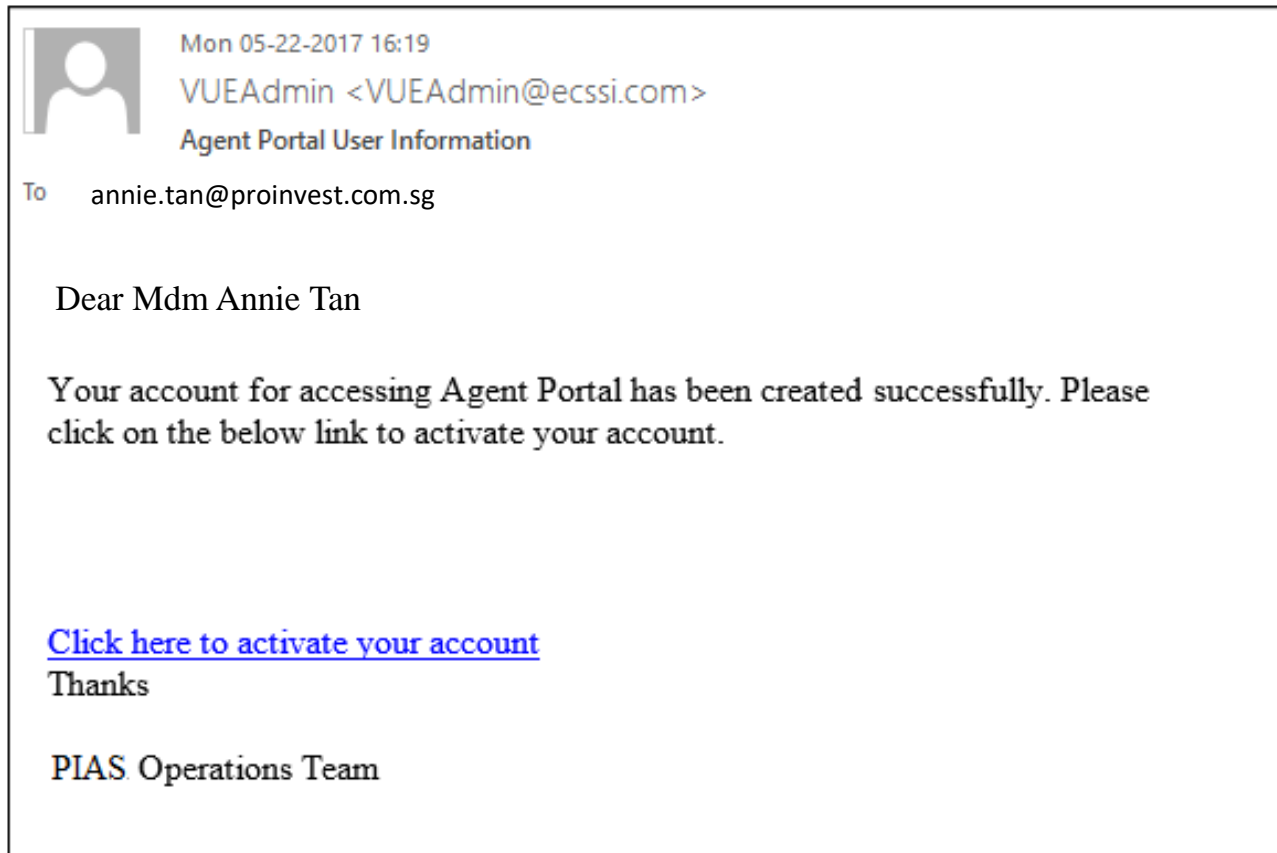
RMS: Overview at High Level



*These modules contain information on Aviva policies only.

How to login

- Existing advisers may login as per normal with their current login details
- New advisers will receive an email informing them to activate their VUE RMS Portal account.
- Click on the link in the email to be re-directed to the VUE Account Settings page.



- It will bring you to the following page.

The screenshot shows the 'Account Settings' page of the VUE Producer Portal. The page has a blue header with the VUE logo and 'Producer Portal' text. Below the header, the title 'Account Settings' is displayed. A red asterisk icon with the text '* = Required' is in the top right corner. The main content area is white and contains the following sections:

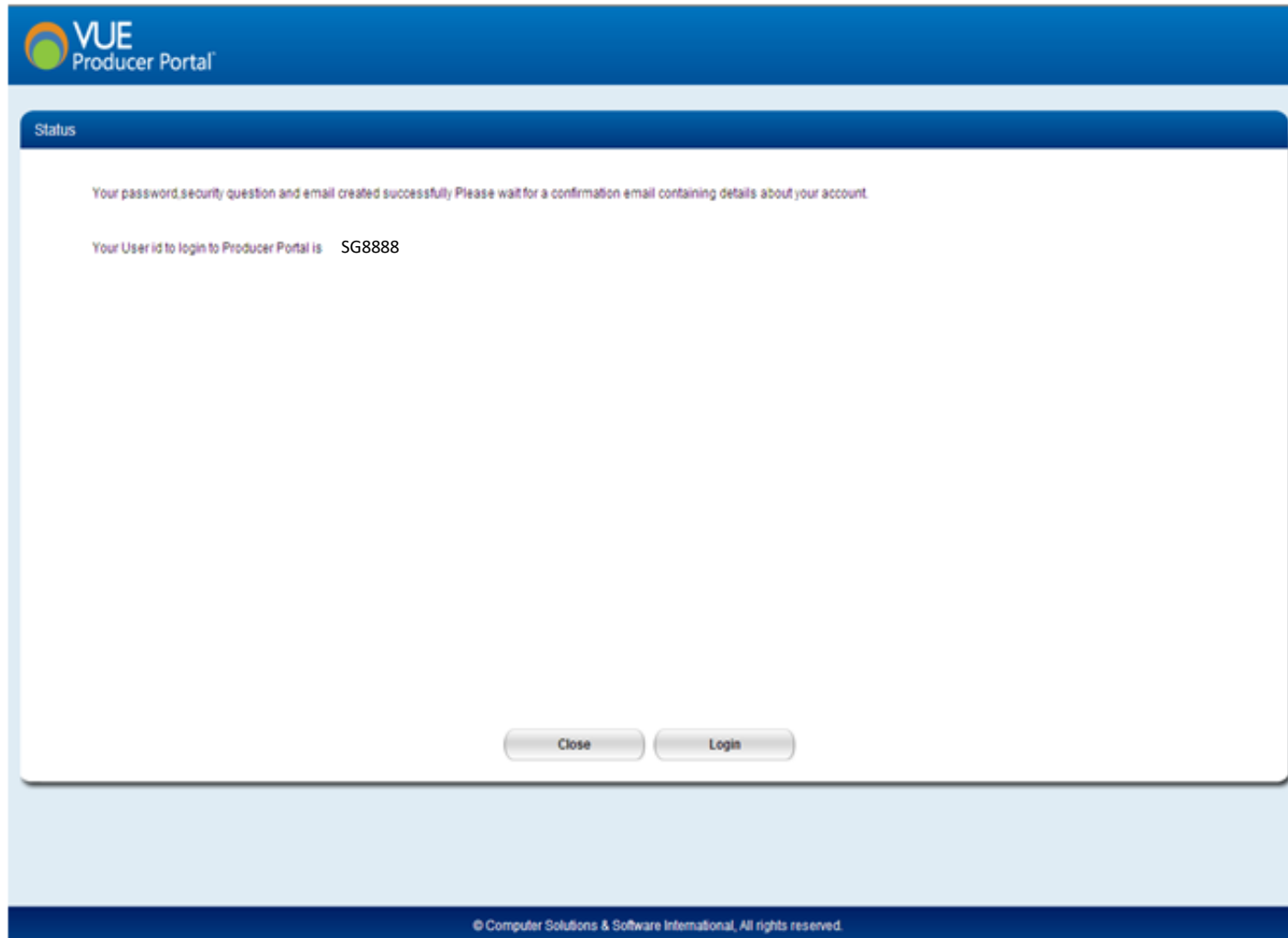
- Welcome,**
As per our security policies you are required to provide the password to login into portal. You are also required to provide the account recovery settings like email address, security question and answer which helps secure your account from unauthorized access and give you a way to access your account.
- Password*** and **Confirm Password*** fields, both containing masked text (dots).
- Email**
We'll use your email address to do things like verify that you own your account, reset your password and more.
Email Address : SagarDS@ecssi.com [Edit](#)
- Security Question**
If you forget your password, your security question helps establish that you own your account.
Security Question* : A dropdown menu showing 'What is the name of your favorite childhood friend'.
Answer* : A text field containing masked text (dots).

A blue **Submit** button is located at the bottom right of the form area.

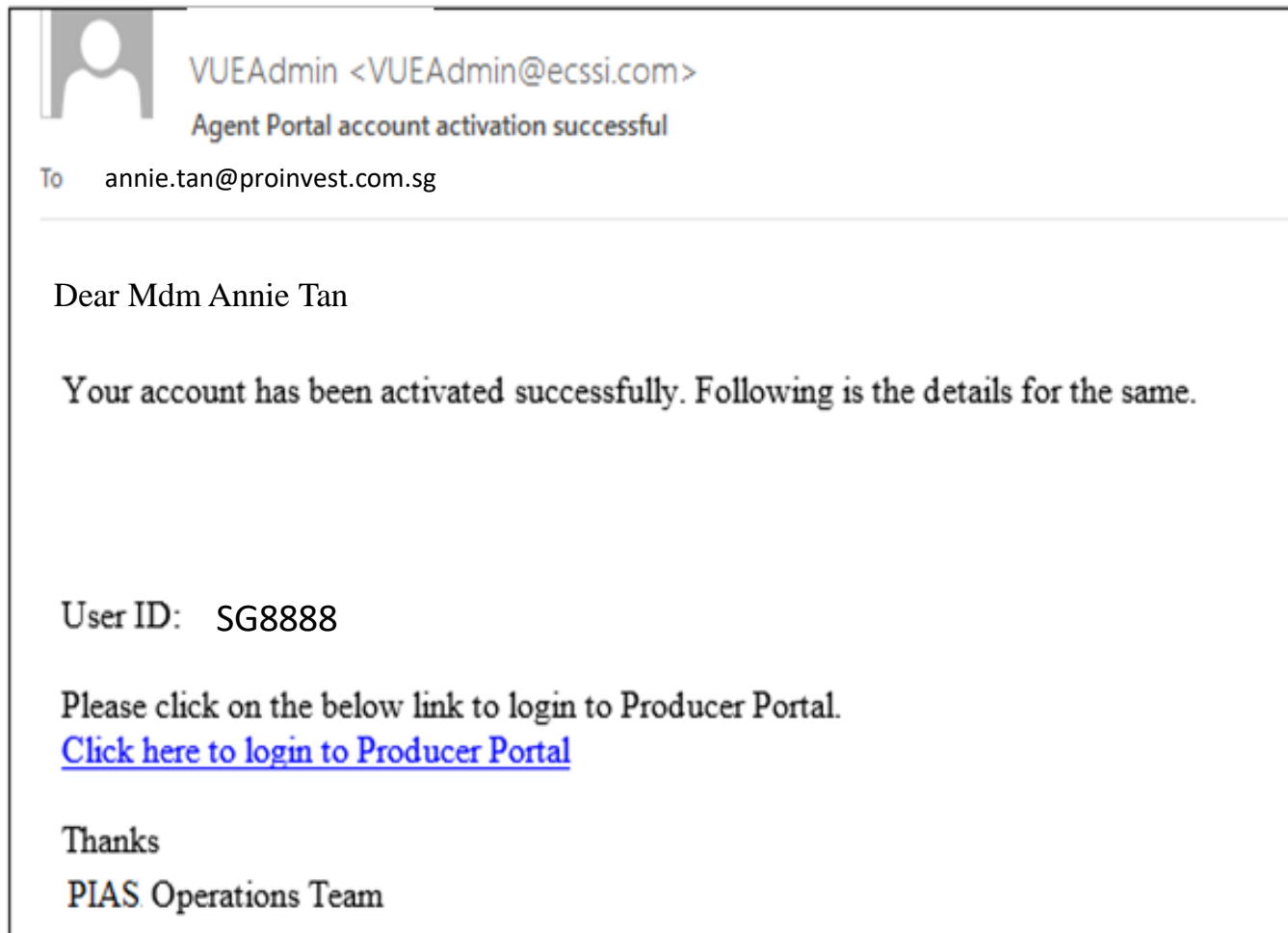
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- Please proceed to set up your personal password.
 - A minimum of 10 Characters/ Uppercase alphabet/ Lowercase alphabet/ Number/ Special character (e.g !, #, \$)
 - Password will expire every 180 days.
- Select one of the Security Question and your own answer to it.
- Do take note that you will need to login **within 72 hours (3 days)** after receiving the email. After 72 hours, the link will expire and you will need to email to vdesk@pias.asia to re-activate your account.

- Once the login is created, you will receive a confirmation message.



- You will also receive a Portal authentication success email with Portal user name and link details.

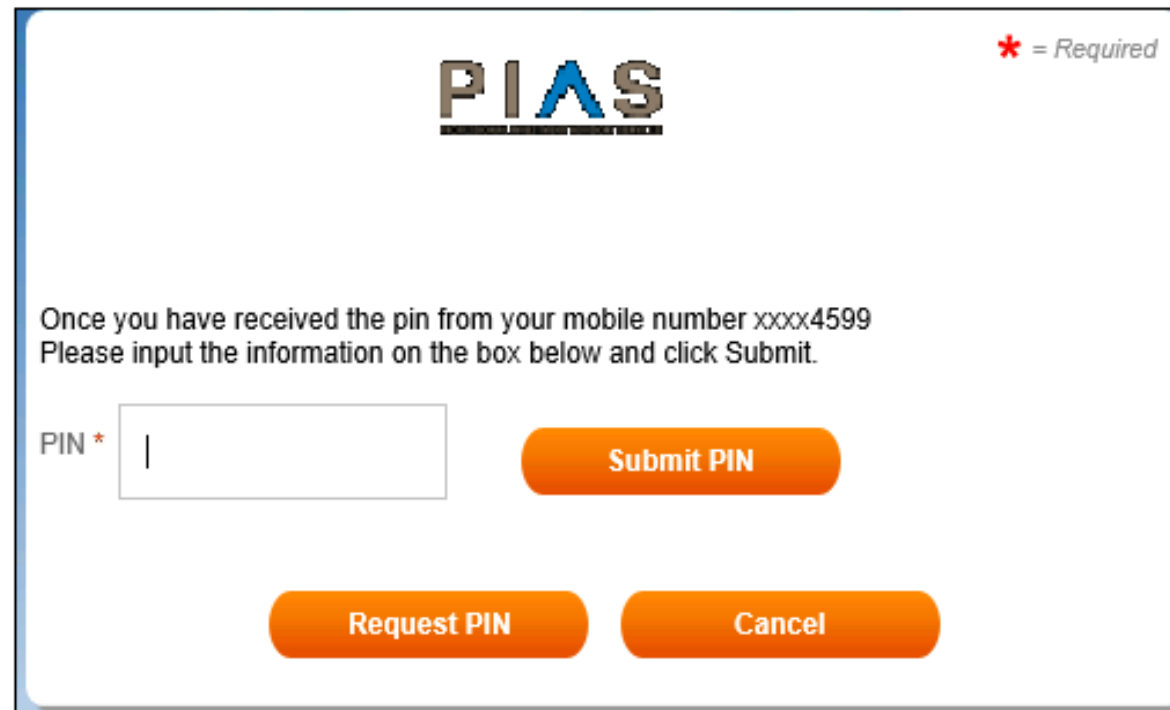


- Click on the link to navigate to login page.
- Also you will have an option to get the temporary password to your email under trouble logging in.



The screenshot shows the PIAS Portal login interface. At the top center is the PIAS logo. To the right of the logo, a red asterisk is followed by the text "= Required". Below the logo, there are two input fields: "User Name *" and "Password *". The "User Name" field contains a single vertical bar character. The "Password" field contains the placeholder text "Enter your password". Below these fields is a checkbox labeled "Remember User Name". At the bottom center is an orange "LOGIN" button. Below the button is a link that says "Having trouble logging in ? [Click Here](#)".

- Once you enter a valid User Name and Password, a One-Time Password (OTP) is sent to your mobile phone. You will be prompted to enter the OTP, as shown below.
- After entering the valid PIN in below screen, you will be logged in to RMS Portal application and the Dashboard will be shown.



The image shows a screenshot of the PIAS portal login screen for OTP verification. At the top center is the PIAS logo. In the top right corner, there is a red asterisk followed by the text "= Required". Below the logo, a message states: "Once you have received the pin from your mobile number xxxx4599 Please input the information on the box below and click Submit." Below this message, there is a label "PIN *" followed by a text input field containing a vertical cursor. To the right of the input field is an orange button labeled "Submit PIN". At the bottom of the screen, there are two orange buttons: "Request PIN" on the left and "Cancel" on the right.

Detail of Main Modules

- Dashboard is landing area, which allows you to visualize the data in different formats with the help of Widgets
- Widgets can be charts, grids or custom widgets.

Home Dashboard is the landing page of VUE RMS portal, the page shows Production Summary, Commission Statements, Persistency, MDRT Qualification Status, Club Awards and Lapsed/CFI/Surrendered policies.

Production (As At 26-Jul-2020)

YTD / MTD	Aviva L & H API (A)	Aviva L & H SPI (B)	Non-Aviva L & H API (C)	Non-Aviva L & H SPI (D)	Navigator (E)	Group Business (F)	General Insurance (G)	Total AIPI (A+B+C+D+E+F+G)	Aviva Non-Par	Aviva Pending APE (Estimation)
YTD	2,564,903	36,150	0	0	0	0	0	2,601,053	259,902	1,963,405
MTD	84,044	23,714	0	0	0	0	0	107,758	12,573	1,963,405



Displaying items 0 - 0 of 0

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of 0

Commission Statement

Pdf	Excel	Payee Name	Statement Date	Amount (\$)	Opening Debit Balance (\$)	Closing Balance (\$)
			28/07/2017	\$1.91	0	
			28/08/2017	\$4,579.42	0	

Displaying items 1 - 50 of 52

50



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Persistency (As At 26-Jul-2020)

TYPE	Inforce APE	Base APE	Persistency
Personal	22,168	25,757	86.07
Direct Team	244,543	257,531	94.96
Unit	3,412,800	3,457,629	98.7

MDRT Qualification Status (As At 03-Aug-2020)

View Select		
Qualification	By Commission Method	By Income Method
MDRT	Not Qualified	Not Qualified
COT	Not Qualified	Not Qualified
TOT	Not Qualified	Not Qualified

Club Awards (As At 08-Apr-2020)

View Select	
Award Name	Status
Platinum	Not Qualified
High Performance	Not Qualified
Achievers	Not Qualified

Lapsed / CFI / Surrendered Policies

View Select								
Carrier	PolicyNo.	Product Name	Client Name	Inception Date	Status Date	Status	Premium	APE
Aviva	UATRR00327	MySavingsPlan		06/02/2020	06/02/2020	Lapsed	3700.8	3700.8

- Advisers can view their information as well as their reporting Advisers by using different SmartVUEs provided in My Advisers module.
- These details include Addresses/contacts, Adviser list, licenses and announcements.

Home	My Agents	Commissions	Production	Book of Business	Repository
	<p>View information related to your profile.</p> <hr/> <p>MY AGENT</p> <p>Addresses/Contacts</p> <p>Agent List by Status</p> <p>View Announcements</p> <p>View Excel Export Jobs</p> <p>View Licenses</p>				

- Commissions are paid for the policies sold.
- The Commission module provides Commission Details and Statement, which lets advisor to know the detailed information regarding how exactly the commission is calculated.
- Advisor can view his MDRT / PB Report under the Commission Menu

Home	My Agents	Commissions	Production	Awards/Incentives	Book of Business	Clients	Repository
		<p>View commission information.</p> <hr/> <p>COMMISSIONS</p> <p>Commission Details</p> <p>Commission Statement</p> <p>MDRT / PB Report</p>					



Compensation Statement

Professional Investment Advisory Services
Shenton Way, #09-08 OUE Downtown2
Singapore 068809
comenquiry@pias.asia

Representative Name: Mr P16 GD1_PB_PSCB_PSCA_05
Representative Code: GDD1

Statement Date: 22/05/2017

Commission Summary

Agent Balance - Beginning		\$0.00
Earned Commission - Personal		\$1,638.00
First Year	\$1,638.00	
Renewal	\$0.00	
Override Commissions - Direct		\$1,404.00
First Year	\$1,404.00	
Renewal	\$0.00	
Override Commissions - Indirect		\$233.97
First Year	\$233.97	
Renewal	\$0.00	
Adjustments		\$350.00
Miscellaneous	\$350.00	
Agent Balance - Ending		<u><u>\$3,625.97</u></u>

- MDRT & PB Report shows the following :
 - Production Bonus Report
 - MDRT – Commission Method
 - MDRT – Income Method

Representative Name :

Representative Code :

\$

Report Date: 02 Oct 2019

Commission Bonus (As at 02 Oct 2019)	Year To Date					
	FYC/Year 1	Year 2	Year 3	Year 4	Year 5	Year 6
Earned Commission (\$\$)	17,184	496	-	-	-	-
Commission Bonus Rate %	10 %	0 %	0 %	0 %	0 %	0 %
Payout Rate %	100 %	100 %	100 %	100 %	100 %	100 %
Indicative Commission Bonus Payable (\$\$)	1,718	0	0	0	0	0
Shortfall for Next Tier	816	7,003	3,000	1,500	1,500	1,500
Next Commission Bonus Tier (%)	12 %	10 %	10 %	10 %	10 %	10 %
Indicative Production Bonus Payable (\$)	1,718	(Amount is payable in February of the following year.)				

Persistence=

100.00

MDRT Qualifying Status by Commission method(as at 02 Oct 2019)

-Minimum of \$69,900.00 Total Commission

-Minimum of \$34,950.00 Commission from Risk-Protection Products

Commission (Risk Protection) (\$\$)	16,216
Commission (Others) (\$\$)	967
Indicative Commission Bonus (\$\$)	1,718
Total Commission (\$\$)	18,901
Number of cases (Risk Protection)	23
Number of cases (Others)	18
Qualify for MDRT?	Not Qualified
Qualify for COT?	Not Qualified
Qualify for TOT?	Not Qualified

MDRT Qualifying Status by Income method (as at 02 Oct 2019)

-Minimum of \$121,000.00 Total Gross Revenue

-Minimum of \$35,145.00 Gross Revenue from Risk-Protection Products and

-Minimum of \$35,145.00 Gross Revenue from New Business

Gross Revenue (Risk Protection) (\$\$)	28,257
Gross Revenue (Others) (\$\$)	1,672
Indicative Commission Bonus (\$\$)	1,718
Total Gross Revenue (\$\$)	31,647
Number of cases (Risk Protection)	25
Number of cases (Others)	18
Qualify for MDRT?	Not Qualified
Qualify for COT?	Not Qualified
Qualify for TOT?	Not Qualified

- YTD and MTD Production Report of the Advisers can be viewed and exported.
- YTD and MTD Summary Reports contain Aviva Life & Health policies only.
- These reports are updated on a daily basis.*
- Advisors can view their Production in the Current Year (Year To Date) and Current Month (Month To Date)
- Supervisors (Managers and Directors) can see their Own Production as well as the Production of all their Advisers.

Home	My Agents	Commissions	Production	Book of Business	Repository
			YTD Summary Report MTD Summary Report		

Note:

***Figures in report may differ from Aviva Online (AOL), as information in AOL is real-time.**

YTD Production Report

- Adviser's Production from 1st Jan of Current Year till Current Date is displayed.
- List of Policies contributing to the Total Production and Aviva Non Par can be viewed by clicking on the hyperlink (text in blue).

YTD Summary Report

Advanced Search

ON

Manager Initial

Agent Name

View Report

Show All My Agents

Yes

Production Date

05-Mar-20

Clear Search

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PIAS

PROFESSIONAL INVESTMENT ADVISORY SERVICES

YTD Production Report

Representative Name: Lim SG Agent1421

Representative Code: SG1421

Report Date: 06 Mar 2020

YTD Production (as at 05 Mar 2020)

Manager	Rep Name	Aviva Life & Health		Non-Aviva Life & Health		Navigator (E)	Group Business (F)	General Insurance (G)	Total (A + B + C + D + E + F + G)	Aviva Non-Par	Aviva Pending APE (Estimation)
		API (A)	SPI (B)	API (C)	SPI (D)						
Lim SG Agent1421	Lim SG Agent1421	31,642	0	0	0	0	0	0	31,642	4,096	21,384
Lim SG Agent1421	Lim SG Agent1422	2,561	0	0	0	0	0	0	2,561	2,561	269,601
Lim SG Agent1421	Lim SG Agent1423	18,090	0	0	0	0	0	0	18,090	15,745	205,713
Lim SG Agent1421 Total		52,293	0	0	0	0	0	0	52,293	22,402	496,697

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YTD Production Report

YTD Production Report

Representative Name: Lim SG Agent1421
Representative Code: SG1421

Report Date: 06 Mar 2020

YTD Production (as at 05 Mar 2020)

Manager	Rep Name	Aviva Life & Health		Non-Aviva Life & Health		Navigator (E)	Group Business (F)	General Insurance (G)	Total (A + B + C + D + E + F + G)	Aviva Non-Par	Aviva Pending APE (Estimation)
		API (A)	SPI (B)	API (C)	SPI (D)						
Lim SG Agent1421	Lim SG Agent1421	31,642	0	0	0	0	0	0	31,642	4,096	21,384
Lim SG Agent1421	Lim SG Agent1422	2,561	0	0	0	0	0	0	2,561	2,561	269,601
Lim SG Agent1421	Lim SG Agent1423	18,090	0	0	0	0	0	0	18,090	15,745	205,713
Lim SG Agent1421 Total		52,293	0	0	0	0	0	0	52,293	22,402	496,697

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Click on the hyperlink (text in blue) to view List of Policies.

YTD Summary Report

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PIAS
PROFESSIONAL INVESTMENT ADVISORY SERVICES

YTD List of Policies

YTD List Of Policies(as at 05 Mar 2020)

Total APE: \$31,642

Manager	Rep Name	Manufacturer	Policy Number	Policy Name	Policy Owner Name	API	SPI	Navigator	Group Business	General Insurance	Aviva Non-PAR	Issued Date
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan		1,244	-	-	-	-	1,244	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing		1,244	-	-	-	-	1,244	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00326	MySavingsPlan		25,186	-	-	-	-	0	05/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield		1,386	-	-	-	-	1,386	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield		168	-	-	-	-	168	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00031	MyEduPlan		2,413	-	-	-	-	53	31/01/2020
Total :						\$31,642					\$4,096	

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YTD Summary Report

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PIAS
PROFESSIONAL INVESTMENT ADVISORY SERVICES

YTD List of Policies (Non-PAR)

YTD List Of Policies(Non-PAR)(as at 05 Mar 2020)

Total Aviva Non-PAR: \$4,096

Manager	Rep Name	Manufacturer	Policy Number	Policy Name	Coverage Name	Policy Owner Name	Aviva Non-PAR	Issued Date
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan	Basic Death/Terminal Illness		1,034	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan	Total and Permanent Disability		210	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing	Basic Death/Terminal Illness		1,034	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing	Total and Permanent Disability		210	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00326	MySavingsPlan	Accidental Death Benefit		0	05/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield	MyShield Basic Cover		0	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield	MyShield Integrated Plan 1		1,386	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield	MyShield Basic Cover		0	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield	MyShield Integrated Plan 3		168	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00031	MyEduPlan	Payer CI Premium Waiver		53	31/01/2020

Page No: 1 of 1

- List of Policies contributing to the Total Production of the Adviser are displayed

YTD List of Policies

YTD List Of Policies(as at 05 Mar 2020)

Total AIP : **\$31,642**

Manager	Rep Name	Manufacturer	Policy Number	Policy Name	Policy Owner Name	API	SPI	Navigator	Group Business	General Insurance	Aviva Non-PAR	Issued Date
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan	[REDACTED]	1,244	-	-	-	-	1,244	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing	[REDACTED]	1,244	-	-	-	-	1,244	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00326	MySavingsPlan	[REDACTED]	25,186	-	-	-	-	0	05/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield	[REDACTED]	1,386	-	-	-	-	1,386	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield	[REDACTED]	168	-	-	-	-	168	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00031	MyEduPlan	[REDACTED]	2,413	-	-	-	-	53	31/01/2020

Total : **\$31,642**

\$4,096

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YTD List of Policies (Non-PAR)

- List of Aviva Non Par Policies (including Riders) will be displayed.

YTD List of Policies (Non-PAR)

YTD List Of Policies(Non-PAR)(as at 05 Mar 2020)

Total Aviva Non-PAR :

\$4,096

Manager	Rep Name	Manufacturer	Policy Number	Policy Name	Coverage Name	Policy Owner Name	Aviva Non-PAR	Issued Date
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan	Basic Death/Terminal Illness	[REDACTED]	1,034	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00032	MyEduPlan	Total and Permanent Disability	[REDACTED]	210	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing	Basic Death/Terminal Illness	[REDACTED]	1,034	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR0600032	MyProtector - Decreasing	Total and Permanent Disability	[REDACTED]	210	01/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00326	MySavingsPlan	Accidental Death Benefit	[REDACTED]	0	05/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield	MyShield Basic Cover	[REDACTED]	0	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00815	MyShield	MyShield Integrated Plan 1	[REDACTED]	1,386	20/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield	MyShield Basic Cover	[REDACTED]	0	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00816	MyShield	MyShield Integrated Plan 3	[REDACTED]	168	21/02/2020
Lim SG Agent1421	Lim SG Agent1421	Aviva Ltd	UATRR00031	MyEduPlan	Payer CI Premium Waiver	[REDACTED]	53	31/01/2020

- Adviser's Production from 1st Day of Current Month till Current Date is displayed
- Advisers can view the List of Policies contributing to the Total Production and Aviva Non Par by clicking on the hyperlink (text in blue).

MTD Production Report

Representative Name: Lim SG Agent1421
Representative Code: SG1421

Report Date: 06 Mar 2020

MTD Production (as at 27 Feb 2020)

Manager	Rep Name	Aviva Life & Health		Non-Aviva Life & Health		Navigator (E)	Group Business (F)	General Insurance (G)	Total (A + B + C + D + E + F + G)	Aviva Non- Par	Aviva Pending APE (Estimation)
		API (A)	SPI (B)	API (C)	SPI (D)						
Lim SG Agent1421	Lim SG Agent1421	27,985	0	0	0	0	0	0	27,985	2,799	21,384
Lim SG Agent1421	Lim SG Agent1422	2,561	0	0	0	0	0	0	2,561	2,561	269,601
Lim SG Agent1421	Lim SG Agent1423	18,090	0	0	0	0	0	0	18,090	15,745	205,713
Lim SG Agent1421 Total		48,636	0	0	0	0	0	0	48,636	21,104	496,697

Page No: 1 of 1

- Adviser's Persistence for the Past 24 months is displayed
- Advisers can view the List of Policies contributing to the Persistence by clicking on the hyperlink (text in blue).



Persistence Report

Representative Name : AgentABC 291

Representative Code : SG1047

Report Date : 09 Jun 2020

Persistence (Policy Status as at 25-May-2020)

Manager	Rep Name	Persistence (%)	Inforce APE	Base APE (IF+LA+SU)
AgentABC 288	AgentABC 373	0.00%	0	792
AgentABC 288 Persistence		0.00%	0	792
AgentABC 291	AgentABC 287	100.00%	5,906	5,906
AgentABC 291	AgentABC 291	81.28%	15,579	19,168
AgentABC 291 Persistence		85.69%	21,485	25,074
AgentABC 294	AgentABC 284	64.99%	2,441	3,755
AgentABC 294	AgentABC 289	100.00%	1,856	1,856
AgentABC 294	AgentABC 320	0.00%	0	2,290
AgentABC 294 Persistence		54.39%	4,297	7,901
AgentABC 301	AgentABC 295	100.00%	948	948
AgentABC 301	AgentABC 297	100.00%	2,665	2,665
AgentABC 301	AgentABC 301	100.00%	570	570
AgentABC 301	AgentABC 313	100.00%	3,108	3,108
AgentABC 301 Persistence		100.00%	7,291	7,291
AgentABC 302	AgentABC 286	0.00%	0	398
AgentABC 302	AgentABC 302	100.00%	6,035	6,035
AgentABC 302	AgentABC 312	100.00%	8,255	8,255
AgentABC 302	AgentABC 346	100.00%	2,427	2,427
AgentABC 302	AgentABC 370	100.00%	7,055	7,055
AgentABC 302	AgentABC 417	100.00%	484	484
AgentABC 302 Persistence		98.39%	24,256	24,654
AgentABC 305	AgentABC 356	100.00%	456	456
AgentABC 305 Persistence		100.00%	456	456

- Policies contributing to Persistence of an Adviser will be displayed



Persistence List of Policies Report

Representative Name: AgentABC 287

Report Date: 09 Jun 2020

Representative Code: SG1043

Manager	Serv Agent Name	Policy Owner Name	Policy No	Product Name	Inception Date	Status Effective Date	Premium	APE	Policy Contract Status
AgentABC 291	AgentABC 287	Jerry Lee	30301740	MyShield	09/09/2019	10/09/2019	672	672	IF
AgentABC 291	AgentABC 287	PDPA Test1	80513428	MYLIFEINCOME - 5 TO 25 YEARS LIMITED PAY	08/05/2019	09/05/2019	3,034	3,034	IF
AgentABC 291	AgentABC 287	PDPA Test1	80230192	MyProtector-MoneyBack	07/08/2018	04/10/2018	532	532	IF
AgentABC 291	AgentABC 287	PDPA Test1	30304570	MyShield	20/05/2019	21/05/2019	157	157	IF
AgentABC 291	AgentABC 287	PDPA Test1	80526804	MyCoreCI	05/05/2019	06/05/2019	1,511	1,511	IF

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New Menu with the following options:

- Policy Owner Information
- Policy
- Premium Due
- Automatic Premium Loan
- Proposal
- Claims
- EDocs

The screenshot displays the PIAS web application interface. At the top, a navigation bar includes links for Home, My Agents, Commissions, Production, Awards/Incentives, Book of Business, Clients, and Repository. The 'Clients' menu is open, showing options: Policy Owner Information, Policy, Premium Due, Automatic Premium Loan, Proposal, Claims, and EDoc. On the left, a sidebar under 'My Clients' lists the same options. The main content area is titled 'Policy Owner Information' and features a search form with fields for Policy Owner Name, Servicing Agent Name, and a dropdown for DOB Month. A 'View' dropdown is set to 'Select'. Below the search form is a table with columns: Servicing Agent Name, Policy Owner Name, Policy Owner ID, Home Number, Mobile Number, Office Number, Email Address, Residential/Office Address, Nationality, Gender, and Date of Birth. The table currently shows 'No records to display.' and includes icons for favorite, refresh, and export.

- Adviser can see Policy Owners of all Policies where the logged in adviser or his lower hierarchy is the Servicing Adviser.

Policy Owner Information										
<div> <div>My Clients</div> <div> <div>Policy Owner Information</div> <div> Policy Premium Due Automatic Premium Loan Proposal Claims </div> </div> </div>										
<div> <div>SEARCH</div> <div> <div>Policy Owner Name</div> <div>Policy Owner ID</div> <div>Servicing Agent Name</div> <div>Mobile Number</div> <div>DOB Month</div> </div> <div> <div>Clear Search</div> <div>Search</div> </div> </div>										
Servicing Agent Name	Policy Owner Name	Policy Owner ID	Home Number	Mobile Number	Office Number	Email Address	Residential/Office Address	Nationality	Gender	Date of Birth
AgentABC 297	CustomerABC 11273	SAMPLECUSTOMER11...	1212121212	887766554433	111111111111 Ext. 1111	test@Aviva-asia.com	home,ADDRESSLINE2,...	Singapore	Female	01/01/1991
AgentABC 302	CustomerABC 11540	SAMPLECUSTOMER11...		99887766			ADDRESSLINE1,ADDR...	Singapore	Female	01/01/1991
AgentABC 302	CustomerABC 11639	SAMPLECUSTOMER11...		99887766			ADDRESSLINE1,ADDR...	Singapore	Male	01/01/1991
AgentABC 295	CustomerABC 11899	SAMPLECUSTOMER11...		99887766			ADDRESSLINE1,SG,Sin...	Malaysia	Female	01/01/1991
AgentABC 287	CustomerABC 12078	SAMPLECUSTOMER12...		99887766		jillion.teo@pias.asia	ADDRESSLINE1,SG,Sin...	Singapore	Female	01/01/1991
AgentABC 287	CustomerABC 12171	SAMPLECUSTOMER12...		99887766		jillion.teo@pias.asia	ADDRESSLINE1,SG,Sin...	Singapore	Male	01/01/1991
AgentABC 287	CustomerABC 12190	SAMPLECUSTOMER12...		99887766		jillion.teo@pias.asia	ADDRESSLINE1,ADDR...	Singapore	Female	01/01/1991
AgentABC 287	CustomerABC 12424	SAMPLECUSTOMER12...	99887766	99887766		jillion.teo@pias.asia	ADDRESSLINE1,SG,Sin...	Singapore	Male	01/01/1991
AgentABC 299	CustomerABC 12430	SAMPLECUSTOMER12...		99887766			ADDRESSLINE1,ADDR...	Singapore	Male	01/01/1991
AgentABC 294	CustomerABC 12495	SAMPLECUSTOMER12...	99887766	99887766		jillion.teo@pias.asia	ADDRESSLINE1,ADDR...	Singapore	Female	01/01/1991
AgentABC 311	CustomerABC 12540	SAMPLECUSTOMER12...		99887766		jillion.teo@pias.asia	ADDRESSLINE1,SG,Sin...	Singapore	Female	01/01/1991
AgentABC 291	CustomerABC 13283	SAMPLECUSTOMER13...		99887766			ADDRESSLINE1,SG,Sin...	Singapore	Male	01/01/1991
AgentABC 304	CustomerABC 13565	SAMPLECUSTOMER13...		99887766			ADDRESSLINE1,SG,Sin...	Singapore	Female	01/01/1991
AgentABC 299	CustomerABC 13615	SAMPLECUSTOMER13...		99887766			ADDRESSLINE1,SG,Sin...	Singapore	Female	01/01/1991
AgentABC 287	CustomerABC 13620	SAMPLECUSTOMER13...		99887766		jillion.teo@pias.asia	ADDRESSLINE1,ADDR...	Singapore	Male	01/01/1991

- Adviser can see Policy Owner details by clicking on the Name

Client Information

Policy Owner Personal Information

Salutation	Mr	Name	[REDACTED]
Date of Birth	16/10/1975	Race	
Identification Number	XXX-XX-427B	Nationality	Singapore
Marital Status	Married		
Residential/Office Address			
Home Number		Office Number	
Mobile Number	[REDACTED]	Email Address	[REDACTED]@YAHOO.COM.SG
Employment Status		Occupation	
Name of Employer		Nature of Business	

Client Portfolio Summary

Policy Information

Policy Number	Policy Name	Policy Owner Name	Life Assured Name	Joint Life Assured Name	Policy Status	Mailing Address
PMUAT0037960	MyRetirement Plus	[REDACTED] [REDACTED]	[REDACTED] [REDACTED]		Active	

- Adviser can see all Policies where the logged in Adviser or his lower hierarchy is the Servicing Adviser

My Clients

Policy

Policy Owner Information

Policy

Premium Due

Automatic Premium Loan

Proposal

Claims

SEARCH

Policy Owner Name and ID

Application Received Year

Application Received Month

Policy Status

Date of Issue Year

Date of Issue Month

Premium Status

Manufacturer

Policy Number

Servicing Agent Name

Clear Search

Search

View

Select

Manufacturer	Servicing Agent Name	Policy Owner Name and ID	Policy Number	Policy Name	Application Received Date	Issue Date	Inception Date	Policy Status	Status Date	Premium Paid To Date	Premium Status	Payment Method	Payment Frequency	Policy Premium Amount
NTUC Income I...	AgentABC 297	CustomerABC 11273 SAMPLECU...	PEND013050	Enhanced Inco...	05/09/2018	05/09/2018	05/09/2018	App Received	12/09/2018				Annually	
NTUC Income I...	AgentABC 302	CustomerABC 11540 SAMPLECU...	PEND027813	Maternity 360	09/04/2019	09/04/2019	22/04/2019	App Received	22/04/2019				Once	
AIA Singapore	AgentABC 302	CustomerABC 11639 SAMPLECU...	PEND025075	HEALTHSHIEL...	10/03/2019	10/03/2019	19/03/2019	App Received	19/03/2019				Annually	
NTUC Income I...	AgentABC 295	CustomerABC 11899 SAMPLECU...	PEND030126	Enhanced Inco...	13/05/2019	13/05/2019	23/05/2019	App Received	23/05/2019				Annually	
Navigator Inves...	AgentABC 287	CustomerABC 12078 SAMPLECU...	PEND030218	Investment Pla...	19/05/2019	19/05/2019	19/05/2019	App Received	24/05/2019				Once	
Navigator Inves...	AgentABC 287	CustomerABC 12078 SAMPLECU...	PEND030219	Investment Pla...	19/05/2019	19/05/2019	19/05/2019	App Received	24/05/2019				Once	
Navigator Inves...	AgentABC 287	CustomerABC 12171 SAMPLECU...	PEND026760	Investment Pla...	29/03/2019	29/03/2019	29/03/2019	App Received	05/04/2019				Once	
Navigator Inves...	AgentABC 287	CustomerABC 12190 SAMPLECU...	PEND029469	Investment Pla...	06/05/2019	06/05/2019	06/05/2019	App Received	14/05/2019				Once	
AIA Singapore	AgentABC 287	CustomerABC 12424 SAMPLECU...	PEND000927	HEALTHSHIEL...	14/03/2018	14/03/2018	14/03/2018	App Received	14/03/2018				Annually	
AXA Insurance ...	AgentABC 299	CustomerABC 12430 SAMPLECU...	PEND009830	AXA Basic Car...	25/07/2018	25/07/2018	25/07/2018	App Received	25/07/2018				Monthly	
AXA Insurance ...	AgentABC 299	CustomerABC 12430 SAMPLECU...	PEND009829	AXA Shield (FI...	25/07/2018	25/07/2018	25/07/2018	App Received	25/07/2018				Annually	
AXA Insurance ...	AgentABC 299	CustomerABC 12430 SAMPLECU...	PEND009831	AXA Shield Ge...	25/07/2018	25/07/2018	25/07/2018	App Received	25/07/2018				Monthly	
Navigator Inves...	AgentABC 294	CustomerABC 12495 SAMPLECU...	PEND027864	Investment Pla...	17/04/2019	17/04/2019	22/04/2019	App Received	22/04/2019				Once	

Displaying items 1 - 50 of 3531

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- Adviser can see all details related to the Policy by clicking on the Policy Number

Policy Summary

PDF


EDoc

Policy Information						
Policy Number	Policy Name	Policy Owner Name	Life Assured Name	Joint Life Assured Name	Policy Status	Mailing Address
8	MyEduPlan	EL	PDPA Test1		Active	Blk 999 Xbx Xvxnx 9, #99-999, Singapore 999999

Displaying items 1 - 1 of 1

Financial Information						
As of Date	Total Premium Paid	Net Surrender Value	Outstanding Policy Loan	Outstanding NF Surr Loan	Revisionary Bonus	APL
03-Jun-2020	\$5,329.50	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

- Policy Information also shows the details related to Premium and Covers

Premium Payment Information								
Policy Premium Amount	Paid to Date	Payment Frequency	Payment Method	Bank Name	Account Number	Giro Status	GIRO Application Date	Rejection Reason
\$2,664.75	05/12/2020	Annually				Success		
<div>  Displaying items 1 - 1 of 1 1 </div>								
Coverage Information								
Coverage Name	Coverage Status	Sum Assured	Coverage Premium Amount	Single Premium Amount	Premium Cessation Date	Risk Commencement Date	Risk Cessation Date	
MyEduPlan (Payout 21 ANB)	In Force	\$28,500.00	\$2,664.75	\$0.00	05/12/2028	05/12/2018	05/12/2039	
Terminal Illness Benefit	In Force	\$28,500.00	\$0.00	\$0.00	05/12/2028	05/12/2018	05/12/2039	

- Adviser can see all Policies where Premium Paid to Date is Today or earlier and the logged in Adviser or his lower hierarchy is the Servicing Adviser

Premium Due									
<div> <div>SEARCH</div> <div> <div>Due From</div> <div>Due To</div> <div>Payment Method</div> <div>Servicing Agent Name</div> </div> <div> <div>Clear Search</div> <div>Search</div> </div> </div>									
Policy Number	Servicing Agent Name	Policy Name	Policy Owner Name and ID	Policy Premium Amount	Payment Frequency	Payment Method	Policy Status	Premium Paid To Date	Latest Giro Collection Status
30304570	AgentABC 287	MyShield	PDPA Test1 T0543329G	426.01	Annually	Basic ElderShield MultiPayment	Active	20/05/2020	
80527758	AgentABC 302	MYLIFEINCOME - SI...	PDPA Test1 T0030514B	100768.05	Once	Cash/Cheque	Active	05/05/2020	
80126419	AgentABC 302	MyWholeLifePlan II	PDPA Test1 T0769143I	3882	Annually	Bank Direct Debit Billing	Active	04/05/2020	Success
P5215566	AgentABC 357	LifetimeFlexi	PDPA Test1 S0142400I	5038.6	Annually	Cash/Cheque	Active	02/05/2020	
51329607	AgentABC 357	MyLifeChoice	PDPA Test1 S0153035F	1318	Annually	Cash/Cheque	Active	02/05/2020	
51329607	AgentABC 357	MyLifeChoice	PDPA Test1 S0153035F	1318	Annually	Cash/Cheque	Active	02/05/2020	
51329895	AgentABC 357	MyRetirement Plus	PDPA Test1 S0170003J	21709.5	Annually	Cash/Cheque	Active	02/05/2020	
51329989	AgentABC 357	MyRegularPay	PDPA Test1 S0170012Z	7012.5	Annually	Cash/Cheque	Active	02/05/2020	
51329947	AgentABC 357	MyWealthPlan	PDPA Test1 S0170008A	2559.6	Semi Annually	Cash/Cheque	Active	02/05/2020	
51335298	AgentABC 357	MyFamilyCover	PDPA Test1 S0142355Z	1603	Annually	Cash/Cheque	Active	02/05/2020	
51329437	AgentABC 357	MyProtector-MoneyB...	PDPA Test1 S0153024J	1064	Annually	Cash/Cheque	Active	02/05/2020	
51335337	AgentABC 357	MyWholeLifePlan	PDPA Test1 S0142405Z	2238	Annually	Cash/Cheque	Active	02/05/2020	
51335355	AgentABC 357	MyWholeLifePlan 25-	PDPA Test1 S0142417C	2234	Annually	Cash/Cheque	Active	02/05/2020	
51334985	AgentABC 357	MyProtector-Level Plus	PDPA Test1 S0113147H	767.2	Annually	Cash/Cheque	Active	02/05/2020	
E7799169	AgentABC 388	MyCare 400	PDPA Test1 T0023058D	510.65	Annually	Basic ElderShield MultiPayment	Active	25/04/2020	
<div>Displaying items 1 - 50 of 111</div> <div>50 Page 1 of 3</div>									

- Adviser can see all Policies with valid APL and the logged in Adviser or his lower hierarchy is the Servicing Adviser

My Clients

Policy Owner Information

Policy

Premium Due

Automatic Premium Loan

Proposal

Claims

Automatic Premium Loan

SEARCH

Due From

Due To

Policy Number

Policy Owner Name and ID

Servicing Agent Name

Clear Search

Search

View

Select

Policy Number	Servicing Agent Name	Policy Owner and ID	Life Assured Name	Policy Name	Payment Frequency	Payment Method	Policy Premium Amount	Premium Due On / Since	Date
E6066009	AgentABC 302	PDPA Test1 T0027075F	PDPA Test1	MyCare Plus 300	Annually	Medisave Acco...	\$0.00	01/09/2019	01/01/2020
E6066009	AgentABC 302	PDPA Test1 T0027075F	PDPA Test1	MyCare Plus 300	Annually	Medisave Acco...	\$0.00	01/09/2019	01/12/2019
E6066009	AgentABC 302	PDPA Test1 T0027075F	PDPA Test1	MyCare Plus 300	Annually	Medisave Acco...	\$0.00	01/09/2019	01/03/2020
80461357	AgentABC 289	PDPA Test1 T0022521A	PDPA Test1	MyWholeLifePlan II	Monthly	Interbank GIRO	\$154.70	02/05/2019	02/02/2020
80461357	AgentABC 289	PDPA Test1 T0022521A	PDPA Test1	MyWholeLifePlan II	Monthly	Interbank GIRO	\$154.70	02/05/2019	02/01/2020
80337085	AgentABC 373	PDPA Test1 T1276871G	PDPA Test1	MyProtector - Term Plan	Monthly	Bank Direct De...		06/10/2019	22/02/2020
06585177	AgentABC 364	PDPA Test1 T0010206C	PDPA Test1	MyWholeLifePlan II	Annually	Cash/Cheque	\$1,302.95	08/03/2019	02/02/2020
06585177	AgentABC 364	PDPA Test1 T0010206C	PDPA Test1	MyWholeLifePlan II	Annually	Cash/Cheque	\$1,302.95	08/03/2019	02/12/2019
06585177	AgentABC 364	PDPA Test1 T0010206C	PDPA Test1	MyWholeLifePlan II	Annually	Cash/Cheque	\$1,302.95	08/03/2019	02/11/2019
80415707	AgentABC 313	PDPA Test1 T7686859F	PDPA Test1	MyWholeLifePlan II	Monthly	Cash/Cheque	\$259.00	07/02/2019	22/02/2020
80101032	AgentABC 388	PDPA Test1 T1268127A	PDPA Test1	MyProtector - Decreasing	Monthly	Bank Direct De...	\$36.40	22/01/2020	18/02/2020
80101032	AgentABC 388	PDPA Test1 T1268127A	PDPA Test1	MyProtector - Decreasing	Monthly	Bank Direct De...	\$36.40	22/01/2020	18/01/2020
80101032	AgentABC 388	PDPA Test1 T1268127A	PDPA Test1	MyProtector - Decreasing	Monthly	Bank Direct De...	\$36.40	22/01/2020	18/12/2019
80800562	AgentABC 302	PDPA Test1 T9718146I	PDPA Test1	MyProtector - Decreasing	Monthly	Visa/Master Cr...		15/10/2019	02/02/2020

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- Adviser can see all Policies which are Pending Issuance and the logged in Adviser or his lower hierarchy is the Servicing Adviser

My Clients		Proposal																																																																																																																																																																							
Policy Owner Information Policy Premium Due Automatic Premium Loan Proposal Claims		<div> <div>SEARCH</div> <div> <div>Application Received Year</div> <div>Application Received Month</div> <div>Follow-Up Required</div> <div>Policy Owner Name and ID</div> <div>Servicing Agent Name</div> </div> <div> <div>Clear Search</div> <div>Search</div> </div> </div> <div> <div>View</div> <div>Select</div> </div> <table> <tr> <th>Policy Number</th><th>Servicing Agent Name</th><th>Policy Owner Name and ID</th><th>Policy Name</th><th>Application Received Date</th><th>Payment Method</th><th>Proposal Status</th><th>Status Date</th><th>Failed Lodgement</th><th>APE</th></tr> <tr> <td>PEND013050</td><td>AgentABC 297</td><td>CustomerABC 11273 SAM...</td><td>Enhanced IncomeShield B...</td><td>05/09/2018</td><td></td><td>App Received</td><td>12/09/2018</td><td></td><td></td></tr> <tr> <td>PEND027813</td><td>AgentABC 302</td><td>CustomerABC 11540 SAM...</td><td>Maternity 360</td><td>09/04/2019</td><td></td><td>App Received</td><td>22/04/2019</td><td></td><td></td></tr> <tr> <td>PEND025075</td><td>AgentABC 302</td><td>CustomerABC 11639 SAM...</td><td>HEALTHSHIELD GOLDMA...</td><td>10/03/2019</td><td></td><td>App Received</td><td>19/03/2019</td><td></td><td></td></tr> <tr> <td>PEND044138</td><td>AgentABC 751</td><td>WONG TEST1002 (HANY...</td><td>Trailer fees</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044084</td><td>AgentABC 751</td><td>WONG TEST1004 T93934...</td><td>ePremier Diamond</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044156</td><td>AgentABC 751</td><td>WONG TEST1007 S80069...</td><td>Investment Plan 1 : CPFOA</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044210</td><td>AgentABC 751</td><td>WONG TEST1009 G72463...</td><td>Bank Loans</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044262</td><td>AgentABC 751</td><td>WONG TEST1009 G72463...</td><td>Signature Wealth</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044174</td><td>AgentABC 751</td><td>WONG TEST1013 (HANY...</td><td>Travel</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044048</td><td>AgentABC 751</td><td>WONG TEST1013 (HANY...</td><td>Ready CompleteCare (cov...</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044066</td><td>AgentABC 751</td><td>WONG PTE LTD 004 2018...</td><td>CAPITAL PLUS</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND044192</td><td>AgentABC 751</td><td>WONG PTE LTD 004 2018...</td><td>Contingency Insurance</td><td>03/12/2019</td><td></td><td>App Received</td><td>04/02/2020</td><td></td><td></td></tr> <tr> <td>PEND030126</td><td>AgentABC 295</td><td>CustomerABC 11899 SAM...</td><td>Enhanced IncomeShield B...</td><td>13/05/2019</td><td></td><td>App Received</td><td>23/05/2019</td><td></td><td></td></tr> <tr> <td>PEND030218</td><td>AgentABC 287</td><td>CustomerABC 12078 SAM...</td><td>Investment Plan 1 : CPFOA</td><td>19/05/2019</td><td></td><td>App Received</td><td>24/05/2019</td><td></td><td></td></tr> <tr> <td>PEND030219</td><td>AgentABC 287</td><td>CustomerABC 12078 SAM...</td><td>Investment Plan 1 : CPFSA</td><td>19/05/2019</td><td></td><td>App Received</td><td>24/05/2019</td><td></td><td></td></tr> </table> <div> <div>Displaying Items 1 - 50 of 837</div> <div> <div>50</div> <div>Page 1 of 17</div> </div> </div>								Policy Number	Servicing Agent Name	Policy Owner Name and ID	Policy Name	Application Received Date	Payment Method	Proposal Status	Status Date	Failed Lodgement	APE	PEND013050	AgentABC 297	CustomerABC 11273 SAM...	Enhanced IncomeShield B...	05/09/2018		App Received	12/09/2018			PEND027813	AgentABC 302	CustomerABC 11540 SAM...	Maternity 360	09/04/2019		App Received	22/04/2019			PEND025075	AgentABC 302	CustomerABC 11639 SAM...	HEALTHSHIELD GOLDMA...	10/03/2019		App Received	19/03/2019			PEND044138	AgentABC 751	WONG TEST1002 (HANY...	Trailer fees	03/12/2019		App Received	04/02/2020			PEND044084	AgentABC 751	WONG TEST1004 T93934...	ePremier Diamond	03/12/2019		App Received	04/02/2020			PEND044156	AgentABC 751	WONG TEST1007 S80069...	Investment Plan 1 : CPFOA	03/12/2019		App Received	04/02/2020			PEND044210	AgentABC 751	WONG TEST1009 G72463...	Bank Loans	03/12/2019		App Received	04/02/2020			PEND044262	AgentABC 751	WONG TEST1009 G72463...	Signature Wealth	03/12/2019		App Received	04/02/2020			PEND044174	AgentABC 751	WONG TEST1013 (HANY...	Travel	03/12/2019		App Received	04/02/2020			PEND044048	AgentABC 751	WONG TEST1013 (HANY...	Ready CompleteCare (cov...	03/12/2019		App Received	04/02/2020			PEND044066	AgentABC 751	WONG PTE LTD 004 2018...	CAPITAL PLUS	03/12/2019		App Received	04/02/2020			PEND044192	AgentABC 751	WONG PTE LTD 004 2018...	Contingency Insurance	03/12/2019		App Received	04/02/2020			PEND030126	AgentABC 295	CustomerABC 11899 SAM...	Enhanced IncomeShield B...	13/05/2019		App Received	23/05/2019			PEND030218	AgentABC 287	CustomerABC 12078 SAM...	Investment Plan 1 : CPFOA	19/05/2019		App Received	24/05/2019			PEND030219	AgentABC 287	CustomerABC 12078 SAM...	Investment Plan 1 : CPFSA	19/05/2019		App Received	24/05/2019		
Policy Number	Servicing Agent Name	Policy Owner Name and ID	Policy Name	Application Received Date	Payment Method	Proposal Status	Status Date	Failed Lodgement	APE																																																																																																																																																																
PEND013050	AgentABC 297	CustomerABC 11273 SAM...	Enhanced IncomeShield B...	05/09/2018		App Received	12/09/2018																																																																																																																																																																		
PEND027813	AgentABC 302	CustomerABC 11540 SAM...	Maternity 360	09/04/2019		App Received	22/04/2019																																																																																																																																																																		
PEND025075	AgentABC 302	CustomerABC 11639 SAM...	HEALTHSHIELD GOLDMA...	10/03/2019		App Received	19/03/2019																																																																																																																																																																		
PEND044138	AgentABC 751	WONG TEST1002 (HANY...	Trailer fees	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044084	AgentABC 751	WONG TEST1004 T93934...	ePremier Diamond	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044156	AgentABC 751	WONG TEST1007 S80069...	Investment Plan 1 : CPFOA	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044210	AgentABC 751	WONG TEST1009 G72463...	Bank Loans	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044262	AgentABC 751	WONG TEST1009 G72463...	Signature Wealth	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044174	AgentABC 751	WONG TEST1013 (HANY...	Travel	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044048	AgentABC 751	WONG TEST1013 (HANY...	Ready CompleteCare (cov...	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044066	AgentABC 751	WONG PTE LTD 004 2018...	CAPITAL PLUS	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND044192	AgentABC 751	WONG PTE LTD 004 2018...	Contingency Insurance	03/12/2019		App Received	04/02/2020																																																																																																																																																																		
PEND030126	AgentABC 295	CustomerABC 11899 SAM...	Enhanced IncomeShield B...	13/05/2019		App Received	23/05/2019																																																																																																																																																																		
PEND030218	AgentABC 287	CustomerABC 12078 SAM...	Investment Plan 1 : CPFOA	19/05/2019		App Received	24/05/2019																																																																																																																																																																		
PEND030219	AgentABC 287	CustomerABC 12078 SAM...	Investment Plan 1 : CPFSA	19/05/2019		App Received	24/05/2019																																																																																																																																																																		

- Adviser can see information related to Proposal or Mid Term Additions by clicking on the Proposal Status

Proposal information and followups			
Proposal Details			
Policy Number	<input type="text"/>	Policy Name/Component Name	MyCare 300
Policy Owner Name and ID	<input type="text"/>	Proposal Type	New
		Policy Status	Proposal
Underwriting Comments & Letters and Memos			
Date	Policy Number	Document Type(name)	Download
29-11-2019	<input type="text"/>	Policy Illustration and/or Product Summary	DB19333AA.BIL
29-11-2019	<input type="text"/>	Policy Illustration and/or Product Summary	DB19333AA.BIF
29-11-2019	<input type="text"/>	Policy Illustration and/or Product Summary	DB19333AA.BID
29-11-2019	<input type="text"/>	Policy Illustration and/or Product Summary	DB19333AA.BF9
29-11-2019	<input type="text"/>	Policy Illustration and/or Product Summary	DB19333AA.BFX
1 2 3 4 5			

- Adviser can see Claims on all Policies where the logged in Adviser or his lower hierarchy is the Servicing Adviser

Claims								
SEARCH								
Policy Number	<input type="text"/>	Policy Owner Name	<input type="text"/>	Life Assured Name	<input type="text"/>	<div>Clear Search</div> <div>Search</div>		
Claim Number	<input type="text"/>	Claim Status	<input type="text"/>	Servicing Agent Name	<input type="text"/>			
Policy Number	Servicing Agent Name	Policy Name	Policy Owner ID	Policy Owner Name	Life Assured ID	Life Assured Name	Claim Number	Claim Type
51329447	AgentABC 357	MyProtector-MoneyBack	S0153015A	PDPA Test1	S0153015A	PDPA Test1	200563138S	Inpatient
51325192	AgentABC 357	MyWealthPlan	S0164025I	PDPA Test1	S0164025I	PDPA Test1	CL20200695	Death
51325192	AgentABC 357	MyWealthPlan	S0164025I	PDPA Test1	S0164025I	PDPA Test1	TESTUAT001	Accident
80707234	AgentABC 291	MyRetirementChoice	T0027023C	PDPA Test1	T0027023C	PDPA Test1	CL20200706	Personal Accident
30304570	AgentABC 287	MyShield	T0543329G	PDPA Test1	T0543329G	PDPA Test1	CL20200096	Severe Disability
51329607	AgentABC 357	MyLifeChoice	S0153035F	PDPA Test1	S0153035F	PDPA Test1	200562860S	Inpatient
51329607	AgentABC 357	MyLifeChoice	S0153035F	PDPA Test1	S0153035F	PDPA Test1	200562860S	Inpatient
51329607	AgentABC 357	MyLifeChoice	S0153035F	PDPA Test1	S0153035F	PDPA Test1	200562860S	Inpatient
51329607	AgentABC 357	MyLifeChoice	S0153035F	PDPA Test1	S0153035F	PDPA Test1	200562860S	Inpatient
80347515	AgentABC 383	MY MULTIPAY CRITICAL ILLNES...	T0030478B	Jackie Shroff	T0030477D	PDPA Test1	CL20200698	Personal Accident
E7573969	AgentABC 301	MyCare Plus 300	T0030310G	PDPA Test1	T0030310G	PDPA Test1	200567254S	Outpatient
P5215566	AgentABC 357	LifetimeFlexi	S0142400I	PDPA Test1	S0142400I	PDPA Test1	CL20200419	Personal Accident
80800562	AgentABC 302	MyProtector - Decreasing	T9718146I	PDPA Test1	T9718146I	PDPA Test1	200567950S	Inpatient
51325156	AgentABC 357	MyWealthPlan	S0164023B	PDPA Test1	S0164023B	PDPA Test1	190509501S	Inpatient
80527758	AgentABC 302	MYLIFEINCOME - SINGLE PRE...	T0030514B	PDPA Test1	T0030514B	PDPA Test1	200567794S	Inpatient
30301740	AgentABC 287	MyShield	S1390934B	Jerry Lee	S2404108E	PDPA Test1	200556164S	Inpatient

- Adviser can see information related to the Claim by clicking on Claim Number

CLAIM DETAILS			
CLAIM DETAILS			
Policy Number		Policy Name	MyProtector - Legacy
Policy Owner ID		Policy Owner Name	
Life Assured ID		Life Assured Name	
Claim Number	CL20180652	Claim Type	
Claim Received Date		Claim Status	Pending
Incurred From		Incurred To	
Additional Information			
Claim Payable	N/A	Payment Date	
CLAIM DOCUMENTS			
Date	Claim Number	Document Type(name)	Download
11-07-2019	CL20180652	Claim Acknowledgement	DB19192AA.BOO
11-07-2019	CL20180652	Claim Acknowledgement	DB19192AA.BNW
11-07-2019	CL20180652	Claim Acknowledgement	DB19192AA.BF6
23-10-2015	CL20180652	Outstanding Claim Information	DB15296AA.CG2
23-10-2015	CL20180652	Outstanding Claim Information	DB15296AA.CEW

- Adviser can see Documents related to Policies and Claims from the EDoc screen by clicking on the Policy or Claim number

EDoc

SEARCH

Policy Number

Claim Number

Servicing Agent Name

Clear Search

Search

	Servicing Agent Name	Policy Number	Claim Number
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	01201030	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	5	[REDACTED]
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	
<input type="checkbox"/>	[REDACTED]	[REDACTED]	

Displaying items 1 - 50 of 11127

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- EDoc screen can also be accessed from Policy Info screen to see the documents related to the Policy

Policy Summary

PDF

EDoc

Policy Information						
Policy Number	Policy Name	Policy Owner Name	Life Assured Name	Joint Life Assured Name	Policy Status	Mailing Address
	MyCare 400				Active	

Displaying items 1 - 1 of 1

Financial Information						
As of Date	Total Premium Paid	Net Surrender Value	Outstanding Policy Loan	Outstanding NF Surr Loan	Revisionary Bonus	APL
15-Jul-2020	\$592.93	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00


Displaying items 1 - 1 of 1

Premium Payment Information								
Policy Premium Amount	Paid to Date	Payment Frequency	Payment Method	Bank Name	Account Number	Giro Status	GIRO Application Date	Rejection Reason
\$560.25	04/07/2020	Annually						

- Awards/Incentives displays the Club Award Report of the Adviser and all his lower hierarchy

Home	My Agents	Commissions	Production	Awards/Incentives	Book of Business	Clients	Repository
				Club Awards Report			

- Adviser can see his Sales Gross and New Business as well as the Result on the Club Awards Report

		Clubs & Incentives Report			
Representative Name : [REDACTED]		Report Date : 04 Aug 2020			
Representative Code : [REDACTED]					
Club Awards (as at 12 Apr 2020)					
Rep Name	Results	Actual		Target for Next Tier	
		Total Sales Gross	New Business Gross	Total Sales Gross	New Business Gross
Lim SG Agent1422	Not Qualified	125,549	125,549	160,000	130,000
[REDACTED]	Not Qualified	120	120	160,000	130,000
[REDACTED]	Not Qualified	21	-	160,000	130,000
[REDACTED]	Not Qualified	26	-	160,000	130,000
[REDACTED]	Not Qualified	125	125	160,000	130,000
[REDACTED]	Not Qualified	104	104	160,000	130,000

Legend	Total Sales Gross	New Business Gross
Platinum	\$300,000	\$230,000
High Performance	\$230,000	\$180,000
Achievers	\$160,000	\$130,000

- Book of Business displays the policy details of the Adviser and of the all the Advisers reporting to him/her.

Home	My Agents	Commissions	Production	Awards/Incentives	Book of Business	Clients	Repository
					View policy information.		
					BOOK OF BUSINESS		
					My Book of Business		
					My Agent Book of Business		

- Adviser Demographic and Contact information can be viewed from the My Profile screen.

Agent Profile

General Information

Agent Name

Identity #

Agent Code

License #

Status

Status Reason

Business from Date

Date Of Birth

Communication Details(Self)

	Address Type	Address Line1	Address Line2	State	Country
<input type="checkbox"/>	29 5	Cross Street	SG	Singapore	

Contact Information

Preferred Contact

Business Fax

Business Phone

Business Email

Home Phone

Mobile Phone

Alternate Email

Individual Applicant Email

You can contact the following parties should you require assistance on:

- Login and IT: PIAS IT team, email: vdesk@pias.asia
- Enquiries relating to Commission: PIAS Commission team, email: comenquiry@pias.asia
- Enquiries relating to Production Reports: PIAS BD Admin, email: bd@pias.asia