



AIA FA Portal Guide

Version 4.1
(updated 18th Nov 2014)

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**THE REAL LIFE
COMPANY**

Users of AIA FA Portal

Who are the users of AIA FA Portal?



1. **Advisors with Advisor Code**

- Able to access marketing materials and download SQS
- Able to access policy & claims enquiries (FA/Broker Access)

2. **Firm Administrators with Advisor Code**

- Able to access marketing materials and download SQS
- Able to access policy & claims enquiries (FA/Broker Access) for all FARs within the firm (limited functions)

3. **Advisors without Advisor Code**

- Able to access marketing materials and download SQS
- **NOT** able to access policy & claims enquiries (FA/Broker Access)
- Using branded/corporate email address only

Things to note

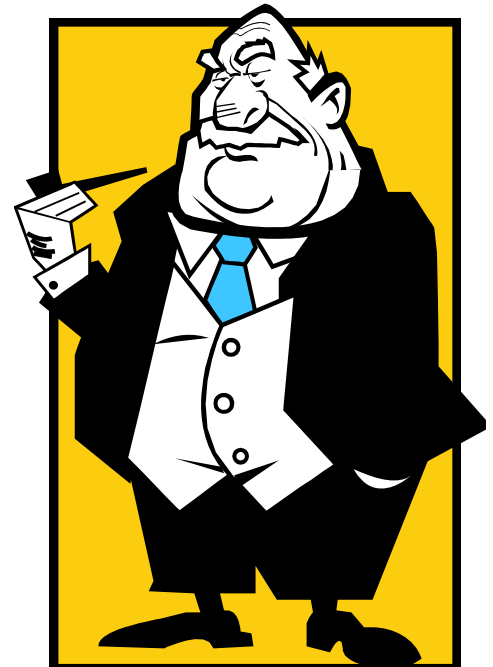


1. Advisors with Advisor Code

- Users can access all the information in AIA FA Portal and Policy Service to view their policies (policy and claim applications).

2. Firm Administrators with Advisor Code

- Users with ***Management Access Rights*** can access all the information in AIA FA Portal and Policy Service to view the policies of all FARs within the firm (policy and claim applications - selected functions).
- For registration for Firm Administrators, please contact sg.pdpos@aia.com for assistance.



Things to note



3. Advisors without Advisor Code

- Users can register for an account using their branded/corporate email address.
- The portal only accepts **branded/corporate email address** (issued by FA/Broker firms) during registration. Personal email address e.g. @yahoo.com / @gmail.com will **not** be accepted due to security issues.
- Users can access all the information in AIA FA Portal **except** Policy Service (policy and claim applications).

How to Access AIA FA Portal?

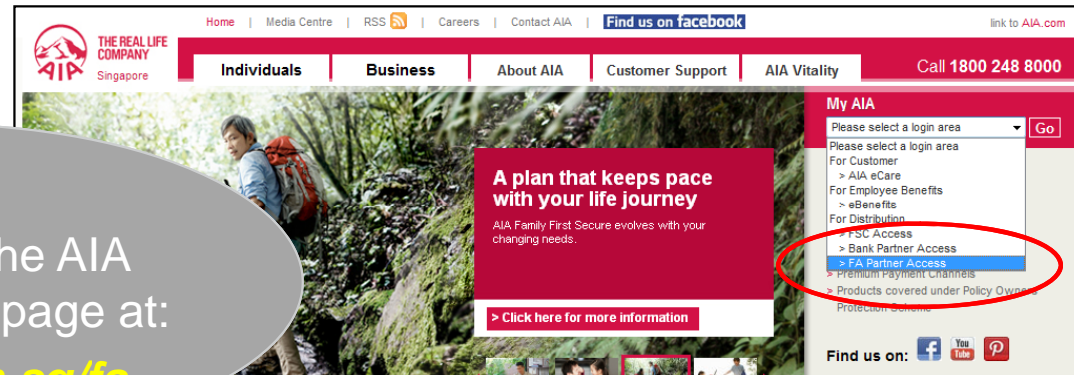
How to Access AIA FA Portal?



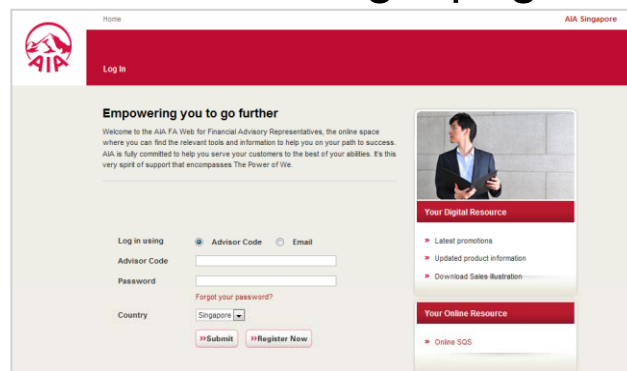
1. Go to www.aia.com.sg → Select “FA Partner Access” in the drop-down box (shown below) → Click on “Go”
OR
2. Go to the portal directly at portal.aia.com.sg/fa

TIPS:

BOOKMARK the AIA
FA Portal login page at:
portal.aia.com.sg/fa



3. AIA FA Portal login page will appear as a pop-out

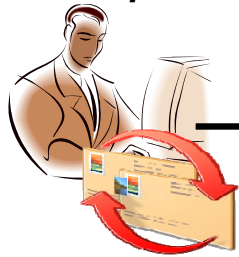


Accessing AIA FA Portal – Advisors with Advisor Code

Registration with Advisor Code → First Time Registration



Go to **portal.aia.com.sg/fa**



Log in using ☒ **Advisor Code** ☐ Email

Advisor Code

Password

Forgot your password?

Country

>>Submit >>Register Now

Select **“Advisor Code”** instead of **“Email”** → Click on **“Register Now”**

Terms & Conditions

Terms and Conditions for Signing Up

The following are the terms and conditions for access and use of the online portal for FA & Broker Access websites. Please read them carefully. This website is provided solely for the use by the authorized representatives or employees of distributors (each a "Distributor") who promote, market, procure and/or submit proposals to the AIA Singapore Private Limited (Reg. No. 201106386R) for life insurance products and/or any other products underwritten by AIA Singapore.

I ACCEPT I DECLINE

Read through the T&Cs → Click on **“I Accept”** at the end of the page to proceed with registration

To sign up, fill in the following information :

Country

Your Agent Code

Your NRIC

Your DOB

Your Mobile no.

Sign-Up Now ! Clear

Select **“Singapore”** → Fill up personal particulars → Click on **“Sign-Up Now!”** to receive temporary password to your mobile registered in AIA system

Temporary password received
→ Click to return to Login page

A Temporary Password was delivered to your registered mobile number XXXX 7862. You will be directed to change the password upon successful login.
Please [click here](#) to return to the Login page. If you did not receive your password, please [click here](#) to return to forget password page.

Successful Login!

Welcome INSURANCE REPRESENTATIVE

Quick Links

- Application and claim status
- Access policy details
- Download forms
- Download Sales Illustration

What We Have Planned

For more information on selling AIA plans, you may download the Product Folder, Understanding guidelines and Compensation Rate Book.

Let Your Voice Be Heard

We are here to help you. Tell us what you think about the portal and what we can improve on.



Enter the OTP...

One-Time-PIN(OTP) will be sent to your mobile number+65****9461.
Please key in your OTP to login. Please note that the OTP will expire in 5 minutes.

OTP **Get A New OTP 26s**

>>Submit

One Time Password (OTP) will be sent to the registered mobile



You password has been changed. New password will be effective at your next logon FA and Bank Portal

Continue

Click on **“Continue”**

Registration with Advisor Code

→ Things to Note



1. If your mobile number is not the same one registered in AIA system, please contact sg.pdpos@aia.com to update your information.

The mobile number you have entered is not the same with the one stored in AIA's system. Please contact Partnership Distribution Operations at sg.partners@aia.com to update your mobile number.

Click [here](#) to return to the Sign-Up page.

2. Should you encounter the screen below, it would mean that you have already registered for an account with us.

FA / Broker Access

[SIGN-UP Results !](#)

You cannot sign up again as you have already subscribed for Distribution Access.

3. Please return to the login page, select “**Advisor Code**” instead of “Email” → Click on “**Forgot your Password**”.

Log in using ☒ Advisor Code ☐ Email

Advisor Code

Password

[Forgot your password?](#)

Country

Forget Password

Forget Password

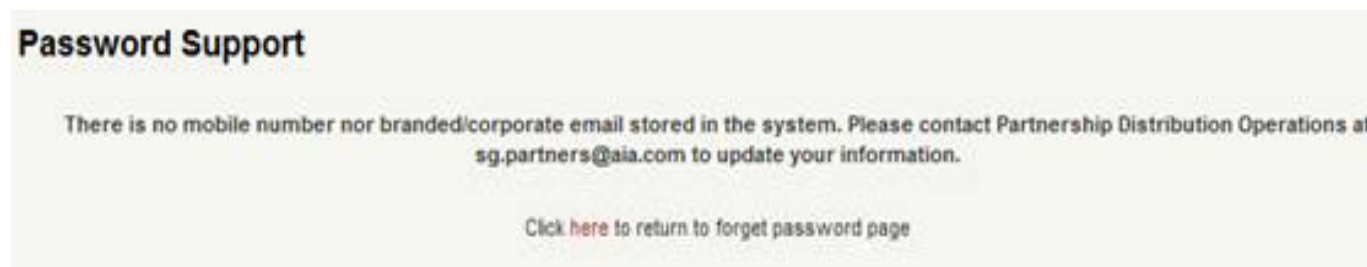
→ No mobile and/or email registered in AIA system



1. If your mobile number is not registered in AIA system, the temporary password will be sent to the branded/corporate email registered in AIA system



2. If both your mobile number and branded/corporate email are not registered in AIA system, please contact sg.pdpos@aia.com to update your information.



Accessing AIA FA Portal – Advisors without Advisor Code (Registration with branded/corporate email address)

Registration with branded/corporate email address



Log in using ☐ Advisor Code ☒ Email

Email



Select **"Email"** instead of "Advisor Code" → Key in your branded/corporate email address → Click on **"Register Now"**

Go to **portal.aia.com.sg/fa**

Sign Up

Email address

First name

Last name

Last name

Mobile number

Other address

Complete the "Sign Up" form.
Note: Mobile no. is impt!

Portal Server

Information will be stored in database



An activation email will be sent to registered email address

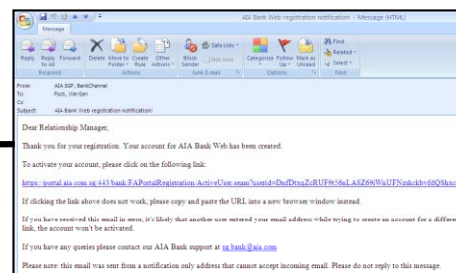
Once account is activated,
user is directed to login page

Log in using ☐ Advisor Code ☒ Email

Advisor Code

Password

Country



Click on the link in the email to activate the account

Log in using ☐ Advisor Code ☒ Email

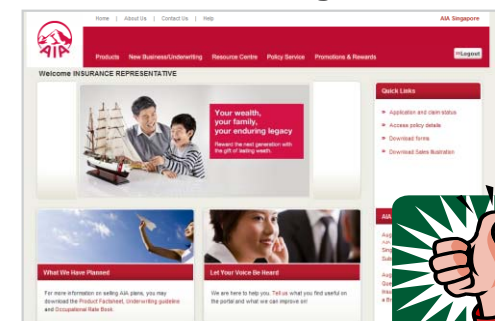
Email

One Time Password (OTP) will be sent to the registered mobile



Select **"Email"**
→ Key in registered email address
→ Click **"Submit"**

Successful Login!



Enter the OTP...

One-Time-PIN(OTP) will be sent to your mobile number+65****9461.
Please key in your OTP to login. Please note that the OTP will expire in 5 minutes.

OTP 26s

Registration with branded/corporate email address → Update registered mobile



1. If you have changed your mobile number, please contact sg.pdpos@aia.com to update your information.

**AIA Policy Service Access –
Only for Advisors and Firm Administrators
with Advisor Codes**

Access to Policy Service (Only for Advisors and Firm Administrators with Advisor Codes)



To access policy and claims enquires → Hold your mouse over “**Policy Services**” → Click on “**Policy and Claims Enquiry**” (Only for Advisors and Firm Administrators with Advisor Codes).

A screenshot of the AIA Singapore website. The top navigation bar is red with white text for 'Home', 'About Us', 'Contact Us', and 'Help'. The main navigation bar is also red with white text for 'Products', 'New Business/Underwriting', 'Resource Centre', 'Policy Service', and 'Promotions & Rewards'. A 'Logout' button is on the right. The 'Policy Service' menu is open, showing 'Policy and Claims Enquiry' (highlighted with a red circle), 'Claims Guidelines', and 'Policy Services Form'. The main content area features a large image of a family with a ship model and the text 'Your wealth, your family, your enduring legacy'. Below this are two smaller sections: 'What We Have Planned' and 'Let Your Voice Be Heard'. On the right, there are 'Quick Links' and 'AIA News' sections.

Access to Policy Service (Only for Advisors and Firm Administrators with Advisor Codes)



After being redirected to the below screen → Click on “**Click here**”.

A screenshot of the AIA Singapore website's Policy Service page. The page has a red header with the AIA logo on the left and navigation links (Home, About Us, Contact Us, Help) and 'AIA Singapore' on the right. Below the header is a red bar with links: Products, New Business/Underwriting, Resource Centre, Policy Service (highlighted with a red underline), and Promotions & Rewards. A 'Logout' button is on the right. The main content area is white. On the left is a sidebar with 'Welcome INSURANCE REPRESENTATIVE' and links for 'Policy and Claims Enquiry', 'Claims Guidelines', and 'Policy Services Form'. The 'Policy and Claims Enquiry' link is expanded, showing a sub-header 'Policy and Claims Enquiry' and a description: 'The status of your policy and claims applications at your fingertips. [Click here](#) to perform your Policy and Claims Enquiry.' The 'Click here' link is circled in red. On the right is a 'Contact Us' section with a photo of three customer service representatives and contact information for the AIA FA Sales Team, including a hotline and email address, and a 'Learn more' link.

Access to Policy Service (Only for Advisors and Firm Administrators with Advisor Codes)



Functions available

The screenshot shows the AIA Policy Service web application interface. On the left is a vertical navigation menu with the following items: Home, Main, Doctors, Best Practice, Policy, Claims, Data Request, Change Password, and Logout. The 'Doctors' item is highlighted with a red dashed box. Below the menu is the AIA logo. The main content area has a header bar with the text 'Main' on the left and 'Wednesday, January 22, 2014' and 'INSURANCE REPRESENTATIVE, 08686-88088' on the right. Below the header, the text 'Welcome, INSURANCE REPRESENTATIVE' is displayed. A 'Whats New!' section follows, listing several features with bullet points:

- Doctors Enquiry**
View all or specify criteria to search for AIA Doctors. Search by Clinic Name, Doctor Name, Gender, Clinic Type, Area and Postal Code.
- Policy Enquiry**
Life, PA and PL policy list and policy detail including Pending. Advance search using policy status and miscellaneous listing premium due listing etc.
- Claim Enquiry**
Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.
- Profile Update**
To update your particulars and submit changes to your profile.
- Customer Data Request**
To download your entire client/policy information.
- Post Sales Benefit Illustration**
Enter policy number to request for PSRI for a specific Life policy

Access to Policy Details

→ Doctors Enquiry



Home
Main
Doctors
Best Practice
Policy
Claims
Data Request
Change Password
Logout

Wednesday, January 22, 2014
INSURANCE REPRESENTATIVE,
08686-88088

Welcome, INSURANCE REPRESENTATIVE

Whats New!

- Doctors Enquiry**
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- Claim Enquiry**
Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.
- Profile Update**
To update your particulars and submit changes to your profile.
- Customer Data Request**
To download your entire client/policy information.
- Post Sales Benefit Illustration**
Enter policy number to request for PSBI for a specific Life policy.

Click here to check on the list of panel of doctors

Access to Policy Details → Policy Enquiry



Home
Main
Doctors
Best Practice
Policy
Claims
Data Request
Change Password
Logout

Wednesday, January 22, 2014
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- Claim Enquiry**
Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.
- Profile Update**
To update your particulars and submit changes to your profile.
- Customer Data Request**
To download your entire client/policy information.
- Post Sales Benefit Illustration**
Enter policy number to request for PSBI for a specific Life policy.

Click here to check on your existing policies submitted

Access to Policy Details

→ Policy Enquiry Options



A screenshot of the AIA website's 'Policy' section. The page has a dark blue header with the word 'Policy' and a date 'Monday, December 06, 2010'. A sidebar on the left contains links: Home, Main, Doctors, Policy, Claims, Change Password, and Logout. The main content area is titled 'Policy Query Options' and lists three options: 'Quick Search' (Search by Policy Number, Insured Name, Insured NRIC, Status for Life, A&H, PL and Credit Life Policies), 'Advanced Search' (Enquiry of Life, A&H and PL policies), and 'Viewing of Correspondence' (marked with a 'NEW' tag, Viewing of Outsourced Cheque Payment Correspondences, Par Plan Anniversary Statement and Supplementary Anniversary Statement). A red dashed circle highlights these three options, and a red arrow points from the circle to the text below. The footer includes a copyright notice for 2009 and a 'Please Read Terms of Use' link.

3 search options for “Policy Enquiry Options”:

- (1) Quick Search
- (2) Advanced Search
- (3) Viewing of Correspondences <not applicable to Firm Administrators with Advisor Code>

Access to Policy Details

→ Policy Enquiry Options → (1) Quick Search



Home
Main
Doctors
Policy
Claims
Change Password
Logout

Main

Monday, December 06, 2010
TAN TAN, 08814-88900

Quick Policy Search

Policy Type ☒ Life ☐ Accident & Health ☐ Personal Lines

☒ Policy No.

☐ Insured Name

☐ Insured NRIC No.

☐ Agent

☐ Status

If you need more complex queries, you can fill in your

Search by any of these options under "Quick Search".

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Access to Policy Details

→ Policy Enquiry Options → (2) Advanced Search



Home
Main
Doctors
Policy
Claims
Change Password
Logout

Main

Monday, December 06, 2010
TAN TAN, 08814-88900

Advanced Search

Policy Type ☒ Life ☐ Accident & Health ☐ Personal Lines

Policy No.

NOTE: If Policy No. is specified, the other search criteria will be ignored.

Agency

Agent

Insured NRIC No.

Insured Name
(A more precise text input will speed up the searching process)

Status

Pay To Date To (MM/DD/YYYY)

Policy Date To (MM/DD/YYYY)

Payment Mode

Sort by
☐ Policy No.
☐ Agent Code
☐ Insured Name
☐ Pay to Date
☐ Policy/Expiry Date
☐ Payment Mode

You have to be patient when using this search as it may take quite a while to return your results due to the complexity of the query and the huge number of records to traverse!

Search by Policy Number OR any of these options under Advanced Search

Access to Policy Details

→ Policy Enquiry Options → (1) Quick Search; and (2) Advanced Search → Successful



[Home](#)
[Main](#)
[Doctors](#)
[Policy](#)
[Claims](#)
[Change Password](#)
[Logout](#)

Monday, December 06, 2010
TAN TAN, 08814-88900

www.aia.com.sg

Policy List

(Information taken from AES/PLAS Database)

S/N	Clas	Policy No.	Insured Name	Contact	NRIC No.	Ins	Own	Pay	Status	Basic Sum Insured	Pay To/ Inception Date	Policy/ Expiry Date	Payment Mode/Method	Servicing Agent
1	SEL	H220028574	MASKEDNG CHYE	Contact	S0677253F	Y	-	-	Inforce - Premium Paying	10	08/01/2009	08/01/2000	ANNUALLY	08814 - 88903 / -
2	SEL	H221394443	MASKEDOON YEW	Contact	S0110508F	Y	Y	Y	Inforce - Premium Paying	10	09/01/2009	09/01/2000	ANNUALLY	08814 - 88904 / -
3	SEL	H239000758	ROBART TO -	Contact	S8473785B	Y	Y	Y	Inforce - Premium Paying	10	10/20/2014	10/20/2009	ANNUALLY	08814 - 88900 / -
4	SEL	L539265714	MASKEDEY YI	Contact	S7536011H	Y	Y	Y	Terminated - Expiry	51,054	10/11/2011	10/11/2009	MONTHLY	08814 - 88900 / -
5	SEL	L539267709	MASKEDEY YI	Contact	S7536011H	Y	Y	Y	Inforce - Premium Paying	50,000	10/11/2014	10/11/2009	ANNUALLY	08814 - 88904 / -

Total Records is 5

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List of policies will be displayed upon successful search by:

- (1) Quick Search
- (2) Advanced Search

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Access to Policy & Claims Status

→ Policy Enquiry Options → (3) Viewing of Correspondences



Note: Not applicable to Firm Administrators with Advisor Code

The screenshot displays the AIA Policy Enquiry system interface. On the left is a navigation menu with links: Home, Main, Doctors, Policy, Claims, Change Password, and Logout. The main content area is titled 'Policy' and has tabs for 'Submit' and 'Inbox'. A search form is visible with 'Policy No: L539265714' and a 'Query' button. A red dashed circle highlights this search area, with a red arrow pointing down to the text 'Search by policy number to view the documents for the particular policy'. Below the search form, a note states: '** If you are the servicing agent for the policy, please query using Policy No and use the Policy Tree on the left side to view all documents including Pending Memo.' Another note below that says 'Submitting agents only. Please see **, if you are the Servicing Agent'. On the right side, there is a 'Note' section explaining that electronic images will be available after 30 seconds, with a longer wait time for high volume requests. Below the note is a tree view showing the document structure for policy L539265714, including folders for 'POS', 'Unmatched Correspondence', 'Correspondences', and 'Sys Gen Docs', each containing specific documents like 'Letter - POSA 20110920' and 'Letter - ETI 20111220'.

Monday, December 06, 2010
TAN TAN, 08814-88900

Policy
Submit Inbox

Policy No: L539265714 Query

** If you are the servicing agent for the policy, please query using Policy No and use the Policy Tree on the left side to view all documents including Pending Memo.

Submitting agents only. Please see **, if you are the Servicing Agent

Note:
If you have submitted the request to view e-document, the electronic image will be available for viewing after 30 seconds.
In the event of high volume of concurrent requests to view the electronic document, the waiting time will be longer (estimate 1 to 5 minutes) to make available the image for viewing.
Thank you for your understanding.

L539265714
POS
Unmatched Correspondence
Correspondences
Letter - POSA 20110920
Endorsement 20110920
Letter - POSA 20110920
Endorsement 20110920
Sys Gen Docs
Letter - ETI 20111220
Letter - ETI 20111220

Search by policy number to view the documents for the particular policy

Access to Policy Details

- Policy Enquiry Options → (3) Viewing of Correspondences
- Successful



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[Policy](#)
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[Change Password](#)
[Logout](#)

Policy

Monday, December 06, 2010
TAN TAN, 08814-88900

Submit **Inbox**

Inbox

Click [Refresh](#) now for status update.

[Back to previous page](#)

Adobe Reader is required to view PDF documents.
If Adobe Reader is not installed yet,
click on Get Adobe Reader to download and install.

Get ADOBE® READER®

S/N	Policy No.	Owner Name	Insured Name	Document Description	Request Date	Status	Delivery Date	Click on image to view
1	L539267709	MASKEDEV YI	MASKEDEV YI	Letter - APL 20131210	12/3/2010 5:01:38 PM	Completed	12/3/2010 5:02:27 PM	0.057 MB
2	L539265714	MASKEDEV YI	MASKEDEV YI	Letter - ETI 20111220	12/3/2010 4:59:41 PM	Completed	12/3/2010 5:00:27 PM	0.038 MB

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List of documents will be displayed upon successful search.

Access to Policy Details → Claim Enquiry



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Main

Wednesday, January 22, 2014
INSURANCE REPRESENTATIVE,
08686-88088

Welcome, INSURANCE REPRESENTATIVE

Whats New!

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- Claim Enquiry**
Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.
- Profile Update**
To update your particulars and submit changes to your profile.
- Customer Data Request**
To download your entire client/policy information.
- Post Sales Benefit Illustration**
Enter policy number to request for PSBI for a specific Life policy.

Click here to check on your existing claims submitted

Access to Policy Details

→ Claim Enquiry Options



The screenshot shows the AIA website interface. On the left is a navigation menu with links: Home, Main, Doctors, Policy, Claims, Change Password, and Logout. The 'Claims' link is highlighted. The main content area has a header with 'Main' and a date/time stamp 'Monday, December 06, 2010 TAN TAN, 08814-88900'. Below the header is a search bar with the text 'Looking for Claims?'. Underneath the search bar is a section titled 'Claims Query Options' with two sub-links: 'Minor Claims' (with a description 'Minor Claims Enquiry for Life, PA and PL Policy.') and 'Major Claims' (with a description 'Major Claim List by Agent or Agency.'). A red dashed circle highlights these two links, and a red arrow points from the circle to the text 'Search by Minor or Major Claims'.

Home
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Doctors
Policy
Claims
Change Password
Logout

Main

Monday, December 06, 2010
TAN TAN, 08814-88900

Looking for Claims?

Claims Query Options

[Minor Claims](#)
Minor Claims Enquiry for Life, PA and PL Policy.

[Major Claims](#)
Major Claim List by Agent or Agency.

Search by Minor
or Major Claims

Access to Policy Details

→ Claim Enquiry Options → Example of a claim search



Home
Main
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Claims
Change Password
Logout

Main

Monday, December 06, 2010
TAN TAN, 08814-88900

Minor Claims

If you need to search for your customers' Minor Claims or you want to know the Minor Claims details, fill in some or all of the following blanks and let us do the work for you !

Agent : TAN TAN - 88900
Claims No. :
Policy No. :
Policy Type : ☒ Life ☐ Personal Accident
☐ Personal Lines
Status : All Status
Insured Name :
Sort By :
☐ Claim No.
☐ Policy No.
☐ Policy Type
☐ Status
☐ Insured Name

Search Now! Clear

Fill in as much information as possible

[Please Read Terms of Use](#)

Access to Policy Details

→ Claim Enquiry Options → Example of a claim search



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[Doctors](#)
[Policy](#)
[Claims](#)
[Change Password](#)
[Logout](#)

Monday, December 06, 2010
TAN TAN, 08814-88900

Minor Claims List

(Information taken from AES and Minor Claims Database)

Servicing Agent : TAN TAN - 0000088900-TAN TAN

S/N	Policy No.	Claim No.	Claimant Name	Status	Accident Date	Hospitalization Date	Discharge Date	Receive Date	Settlement Date	Claim Agent
1	L639266714	BF000102	Maskedey Yi	NA	5/1/2010	-	-	5/14/2010	-	08814 - 88900
2	H239000758	BF000153	Robartto -	RT	-	8/1/2010	8/5/2010	8/12/2010	7/1/2013	08814 - 88900

Total Records: 2

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Claims will be displayed;
Click on any of them to
check on the details

Access to Policy Details

→ Claim Enquiry Options → Example of a claim search



The screenshot displays the AIA Minor Claims portal. On the left is a navigation menu with links: Home, Main, Doctors, Policy, Claims, Change Password, and Logout. The 'Claims' link is highlighted. The main content area is titled 'Minor Claims - BF000153' and includes a sub-header '(Information taken from AES and Minor Claims Database)'. Below this, the 'Agent' section shows 'Name : TAN TAN - 88900 @ FA FIRM B (51)'. The 'Claims Details' section is divided into two columns. The left column lists: 'Key Policy No. : H239000758', 'Occurrence No. : 1', 'Claimant Name : ROBERTTO -', 'Description : -', 'Illness : 4561 - ESOPH VARICES W/O BLEED', 'Accident Date : -', 'Hospitalization Date : 8/1/2010', 'Receive Date : 8/12/2010', and 'Remarks : sfjasfjasjldjsalkjsdfla'. The right column lists: 'Assessor : M5DSK', 'Status : RT', 'Discharge Date : 8/5/2010', and 'Settlement Date : 7/1/2013'. A red dashed oval encircles the 'Claims Details' section, with a red arrow pointing from it to the text 'Claims information/details will be displayed'. At the bottom of the page, there is a copyright notice: 'Copyright © 2009, American International Assurance Company, Limited and its affiliates and subsidiaries. All rights reserved.' and a blue bar with the text 'Please Read Terms of Use'.

Home
Main
Doctors
Policy
Claims
Change Password
Logout

Monday, December 06, 2010
TAN TAN, 08814-88900

Minor Claims - BF000153

(Information taken from AES and Minor Claims Database)

Agent
Name : TAN TAN - 88900 @ FA FIRM B (51)

Claims Details

Key Policy No.	: H239000758	Assessor	: M5DSK
Occurrence No.	: 1	Status	: RT
Claimant Name	: ROBERTTO -		
Description	: -		
Illness	: 4561 - ESOPH VARICES W/O BLEED		
Accident Date	: -		
Hospitalization Date	: 8/1/2010	Discharge Date	: 8/5/2010
Receive Date	: 8/12/2010	Settlement Date	: 7/1/2013
Remarks	: sfjasfjasjldjsalkjsdfla		

Claims information/details will be displayed

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Access to Policy Details

→ Customer Data Request

A screenshot of the AIA Insurance Representative portal. On the left is a vertical navigation menu with links: Home, Main, Doctors, Best Practice, Policy, Claims, Data Request, Change Password, and Logout. The 'Data Request' link is highlighted with a red dashed oval. The main content area has a header with the date 'Wednesday, January 23, 2013' and the user's name 'INSURANCE REPRESENTATIVE, 08627-84444'. Below this is a 'Welcome, INSURANCE REPRESENTATIVE' message. A 'Whats New!' section lists several items: 'Doctors Enquiry' (green text), 'Policy Enquiry' (red text), 'Claim Enquiry' (blue text), 'Customer Data Request' (orange text, highlighted with a red dashed oval), and 'Post Sales Benefit Illustration' (orange text). A red arrow points from the 'Customer Data Request' link to the text below the screenshot.

Home
Main
Doctors
Best Practice
Policy
Claims
Data Request
Change Password
Logout

Wednesday, January 23, 2013
INSURANCE REPRESENTATIVE,
08627-84444

Welcome, INSURANCE REPRESENTATIVE

Whats New!

- Doctors Enquiry**
View all or specify criteria to search for AIA Doctors. Search by Clinic Name, Doctor Name, Gender, Clinic Type, Area and Postal Code.
- Policy Enquiry**
Life, PA and PL policy list and policy detail including Pending. Advance search using policy status and miscellaneous listing premium due listing etc.
- Claim Enquiry**
Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.
- Customer Data Request**
To download your entire client/policy information.
- Post Sales Benefit Illustration**
Enter policy number to request for PSBI for a specific Life policy.

Click here to download your entire client/policy information
<not applicable to Firm Administrators with Advisor Code>

•Access to Policy Details → Customer Data Request → Submit



Data Request

Submit Check

Wednesday, January 23, 2013
INSURANCE REPRESENTATIVE,
08627-84444

Submit Requests ?



You are restricted to submit requests only once a month.

Please select the following data to be extracted :

Request for Client Data Download



Enter a password to secure the Excel file:

Please confirm password :

SubmitClear

Password Logic:

Password must be at least 8 characters, alphanumeric, and combination of upper and lower case alphabets, and numbers. (at least one upper case character, one lower case character, and one number e.g. Aa123456)

Notes:

- The data extraction report will be available on the next working day.
- Request can only be submitted 1 month after your last request.
eg. Last report was generated on 15 Jan 2014, you can only generate a report after 15 Feb 2014.

Access to Policy Details

→ Customer Data Request → Submit → Acknowledgement



Data Request

[Submit](#) [Check](#)

Wednesday, January 23, 2013
INSURANCE REPRESENTATIVE,
08627-84444

Your request for Client Data Download was
successfully submitted on 1/23/2013 11:30:56 AM.

Your request will be processed and the data file will be available for download at least 3 working days later.

A confirmation email containing the password (provided by you), has been sent to the your email id: ;@aia.com].

Data Request Submission Notification dated Wednesday, January 23, 2013. - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward Print Attachments X Undo Redo A+ A-

This message was sent with High importance.

From: DataRequest_Admin [distribution.support@aia.com] Sent: Wed 1/23/2013 11:31 AM
To: [REDACTED]
Cc:
Subject: Data Request Submission Notification dated Wednesday, January 23, 2013.

Ref: 84444

Dear INSURANCE REPRESENTATIVE,
This is to confirm that your request for data download was successfully submitted on 1/23/2013 11:30:56 AM. Your request will be processed and the data file will be available for download at least 3 working days later.

Your self-defined password to access the data file is 'Aa123456'

This is a system generated notification. Pls do not to reply to this message.

Access to Policy Details

→ Customer Data Request → Check



Data Request

Submit

Check

Wednesday, January 23, 2013
INSURANCE REPRESENTATIVE,
08627-84444

Customer Data Download

Download the most recently completed requests :
Note: After the downloading is completed, please double click on the downloaded file to uncompress it.

Data Request Information	Details
» Request Submitted Date	1/23/2013 11:30:56 AM
» Request Status	Pending Extraction
» Request Completed Date	NA
Data Extracted Information	Details
» Extract Completion Date	
» Extracted File Type - After Uncompressed	EXCEL
» Download the Extracted File Link	Pending Extraction

Important Note:
Leaving downloaded data in your PC or Notebook or other backup device is always a risk. Please protect your customer information

Access to Policy Details

→ Customer Data Request → Check → Successful



Data Request

LI AILING OF AI

Customer Data Download

Download the most recently completed requests :

Note: After the downloading is completed, please double click on the downloaded file to uncompress it.

Data Request Information	Details
» Request Submitted Date	1/23/2013 11:05:58 AM
» Request Status	Completed
» Request Completed Date	1/24/2013 4:04:41 AM
Data Extracted Information	Details
» Extract Completion Date	1/24/2013 4:04:28 AM
» Extracted File Type - After Uncompressed	EXCEL
» Download the Extracted File Link	Download

Important Note:

Leaving downloaded data in your PC or Notebook or other backup device is always a risk. Please protect your customer information

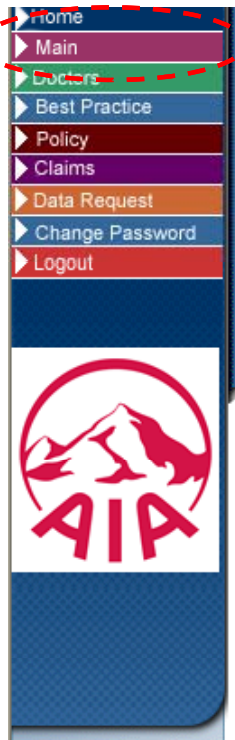
Important Note: There are 2 passwords!

-First password is your Advisor Code.

-After that when you want to view the content, you need to enter the password keyed in during request submission.

Access to Policy Details

→ Post Sales Benefit Illustration



Main

Wednesday, January 23, 2013
INSURANCE REPRESENTATIVE,
08627-84444

Welcome, INSURANCE REPRESENTATIVE

Whats New!

Doctors Enquiry

View all or specify criteria to search for AIA Doctors. Search by Clinic Name, Doctor Name, Gender, Clinic Type, Area and Postal Code.

Policy Enquiry

Life, PA and PL policy list and policy detail including Pending. Advance search using policy status and miscellaneous listing premium due listing etc.

Claim Enquiry

Minor and Major Claim Enquiry System for Life and PA. Allow search by Minor Claim status and Insured name.

Customer Data Request

To download your entire client/policy information.

Post Sales Benefit Illustration

Enter policy number to request for PSBI for a specific Life policy.

Click here to request
for PSBI for a
specific Life policy

Post Sales Benefit Illustration - Request



Post Sales Benefit Illustration

Step 1 - PSBI Request Submission

Step 2 - Retrieve PSBI Document

Submission of Request for Post Sales Benefit Illustration (PSBI)

Company:

Singapore

Enter Policy Number:

Submit

Note:

If you have submitted **ten (10)** PSBI requests which are still pending for processing, the next request will be accepted after the existing requests have been processed. This is to facilitate efficient allocation of system resources and to ensure reasonable waiting time for all users of this function. Thank you for your understanding !!

Note:
- Only applicable to Traditional Life Policy [excludes Investment Linked Policies (ILP) and Platinum Legacy/Preserver policies]

Post Sales Benefit Illustration - Retrieve



Post Sales Benefit Illustration

[Step 1 - PSBI Request Submission](#)

[Step 2 - Retrieve PSBI Document](#)

Retrieve PSBI Document (in PDF format)

- The list will only reflect submission for last 3 days.

Company	Policy No	Request Date / Time	Basic Plan	Coupon Accumulated	Stop Paying Premium Option	Stop Paying Premium at Year	Include Rider Premium	Dividend Accumulated	PSBI Status	PSBI
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No PSBI Requested.

[REFRESH!](#)

AIA Partnership Distribution Operations Team - Enquiry Contact Details

AIA Partnership Distribution Operations Team

Contact Details



Enquiry	Contact Details
Post Sales – All channels	Hotline: 62-488-488 Operating Hours: Mon – Fri, 9am to 5pm (excluding Public Holidays) Email: sg.pdpos@aia.com
New Business – Financial Advisory Channel	Hotline: 62-488-488 Operating Hours: Mon – Fri, 9am to 5pm (excluding Public Holidays) Email: sg.partners@aia.com