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**Etiqua Life Insurance Berhad & Etiqa Family Takaful Berhad**

**User Guide for Corporate Portal  
(Phase 3)**

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# 1 Introduction

## 1.1 Brief Background

Corporate Portal is a portal for corporate customers, agents and brokers to administer their group policies, ie: submission of document or / and member data including addition, deletion or alternation as well as viewing of policy information through the portal.

## 1.2 Purpose/ Objective of Document

This document is the User Manual of Corporate Portal. It is intended to provide an overview key features or function of the Corporate Portal to business users to operates the system.

## 1.3 Scope

The scope of this User Manual include the following:

- (a) Login access with 2 Factor Authentication
- (b) Outpatient Member upload function

## 1.4 Abbreviations

Abbreviations	Description
EPP	Etiga Partner Portal
EFTB	Etiga Family Takaful Berhad
ELIB	Etiga Life Takaful Berhad
CGLS	Core Group Life System
ROC	Registration of Company

## 1.5 Intended Audience

Corporate Customers

## 2 User Guide to Corporate Portal

### 2.1 Steps to login with new 2 Factor Authentication into Corporate Portal

Step 1:

- User to login using email address registered with corporate portal. Login page as below:

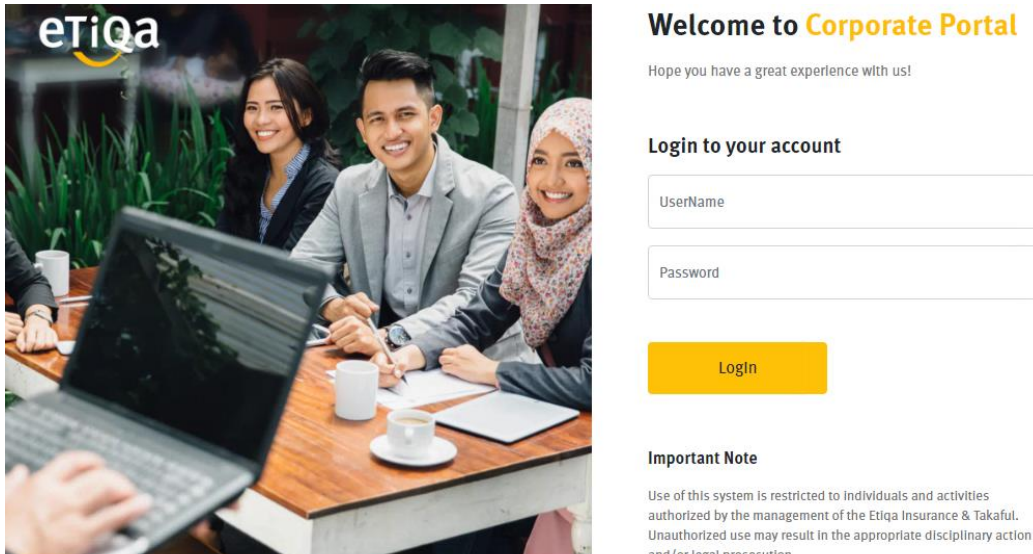


Figure 1: Login Page

- If the login credentials (Username and Password) are correctly entered upon login, it will lead to page below (Figure 2) for user to key in the One-Time Code.

Resend'. Below this message are two yellow buttons: 'SUBMIT' and 'CANCEL'. At the bottom, there is an 'Important Note' section with text: 'Use of this system is restricted to individuals and activities authorized by the management of the Etiqa Insurance & Takaful. Unauthorized use may result in the appropriate disciplinary action and/or legal prosecution'." data-bbox="174 569 843 826"/>

Figure 2: One Time Code

- The One-Time Code will be send to user's Email (based on email address created upon enrolment). May refer automated email details in Figure 3 below

From: [administrator@etiqa.com.my](mailto:administrator@etiqa.com.my) <[administrator@etiqa.com.my](mailto:administrator@etiqa.com.my)>

Sent: Tuesday, May 25, 2021 7:03 PM

To: Teoh Te-Rence

Subject: Corporate Portal OTP Code UAT

Dear [ITRAUser1@gmail.com](mailto:ITRAUser1@gmail.com),

TAC for Login Authorization to Corporate Portal.

TAC Number: **076266**

This TAC Number only valid for 2 minutes.

PLEASE DO NOT SHARE.

Should you require further assistance, please call Etiqa Contact Centre 1300 13 8888 or email to us [info@etiqa.com.my](mailto:info@etiqa.com.my)

Thank you.

This is system generated message, please do not reply to this email.

\*\*\*\*\* Disclaimer: This message is intended only for the use of the person to whom it is addressed. It may contain confidential and legally privileged information. If you are not the intended recipient, you are hereby notified that any use, reliance on, reference to, review, disclosure or copying of the message and the information it contains for any purpose is prohibited. If you have received this message in error, please notify the sender by reply e-mail of the misdelivery and delete all its contents. Opinions, conclusions and other information in this message that do not relate to the official business of Malayan Banking Berhad (Etiqa) shall be understood as neither given nor endorsed by it. \*\*\*\*\*

(ppE)\*\*\*\*\*

Disclaimer:

This message is intended only for the use of the person to whom it is expressly addressed and may contain information that is confidential and legally privileged. If you are not the intended recipient, you are hereby notified that any use, reliance on, reference to, review, disclosure or copying of the message and the information it contains for any purpose is prohibited. If you have received this message in error, please notify the sender by reply e-mail of the misdelivery and delete all its contents. Opinions, conclusions and other information in this message that do not relate to the official business of Malayan Banking Berhad (Etiqa) shall be understood as neither given nor endorsed by it. \*\*\*\*\*

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**Figure 3: Email on One Time Code**

Step 2:

- User needs to key in One-Time Code given and click 'Submit' button in order to access Portal

Note: The One-Time Code will be only valid for 2 minutes.

- If user encounter error messages below (Figure 4 & 5) due to incorrect or invalid code, user may re-attempt by clicking onto 'Resend' to re-trigger a new One-Time Code

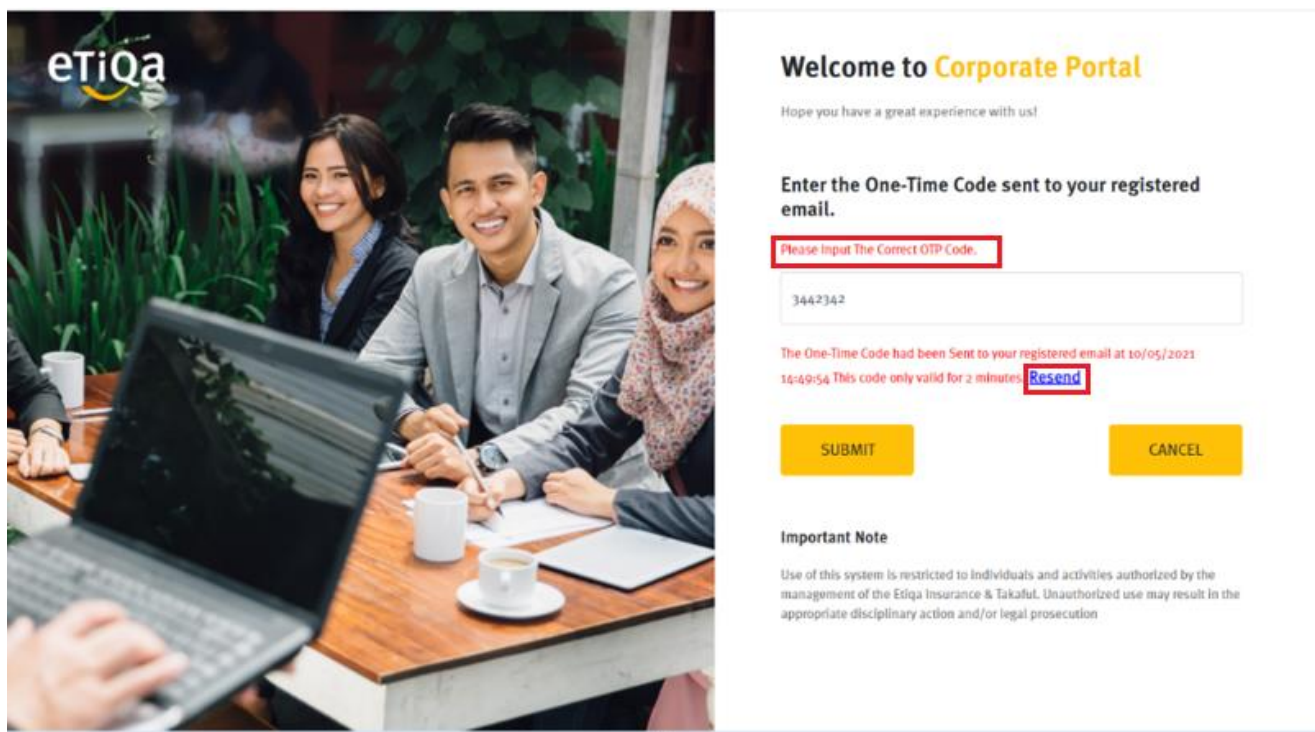


Figure 4: Incorrect OTP

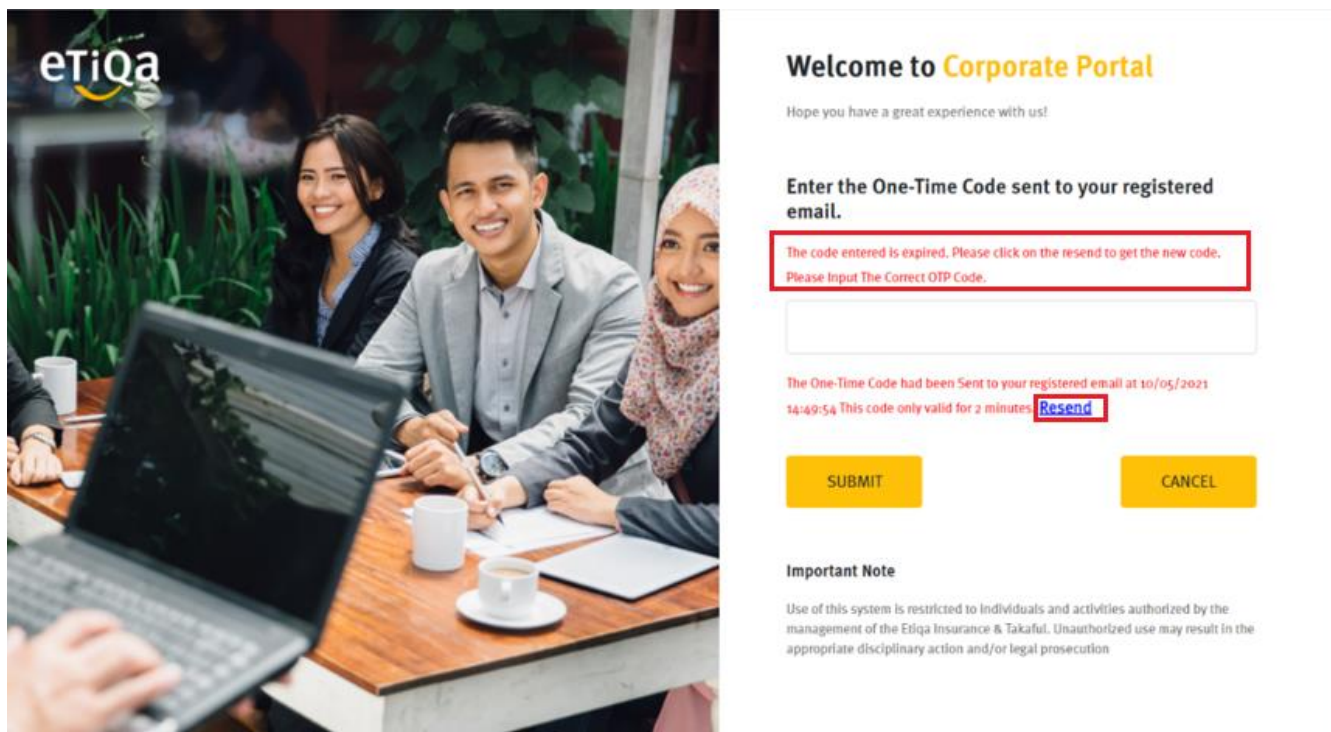


Figure 5: Invalid OTP

- User can contact EB support at [ebpolicy@etiga.com.my](mailto:ebpolicy@etiga.com.my) for any further assistance



## 2.2 Member Upload in Corporate Portal

Step 1:

- User need to click on the member tab on the menu bar on the left side of the main screen for member upload feature and press 'Submit new member/endorsement listing' button to upload member (Figure 6) and submission window will be prompted (Figure 7) as below:

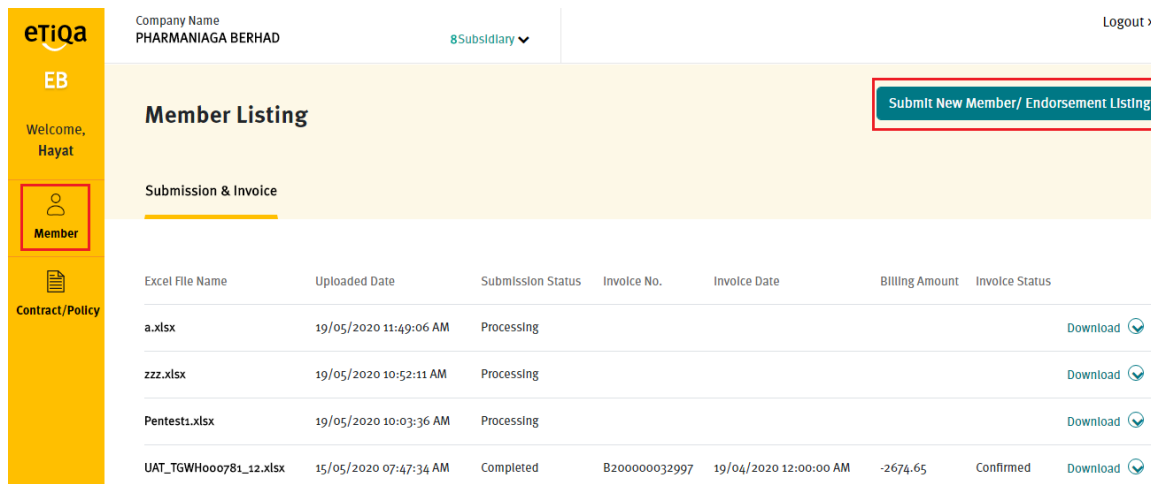


Figure 6: Member Upload Screen

Step 2:

- Once the upload member-listing window appears (Figure 7), user will need to select Outpatient product from dropdown to perform upload.

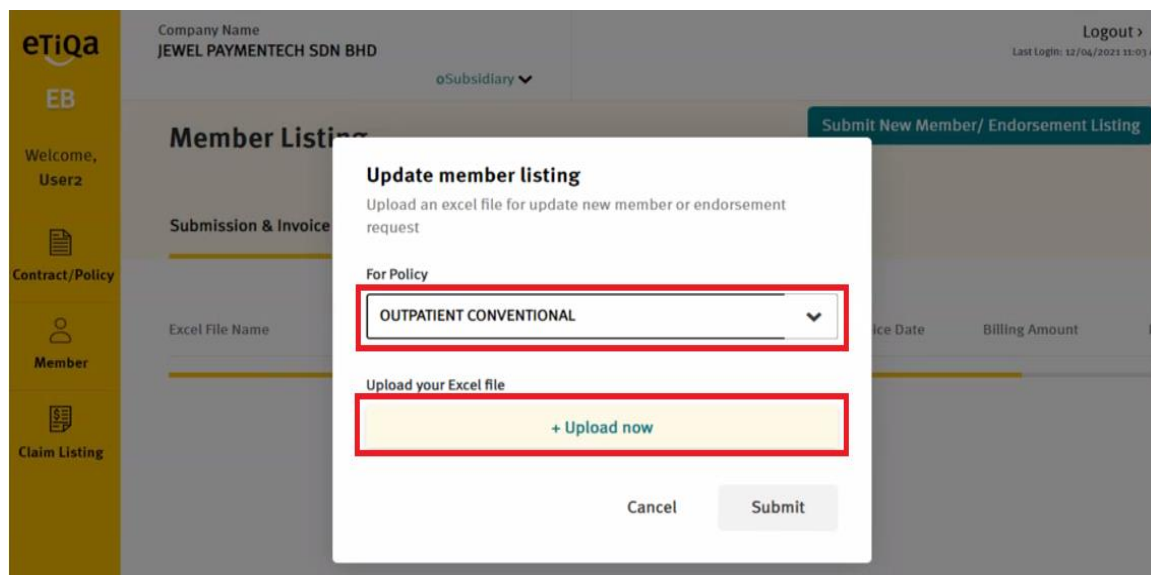


Figure 7: Member Upload Submission Window

- A message will appear to notify user (Figure 8), that they will need to enroll members for GHS product first before enrolling member for Outpatient Product.

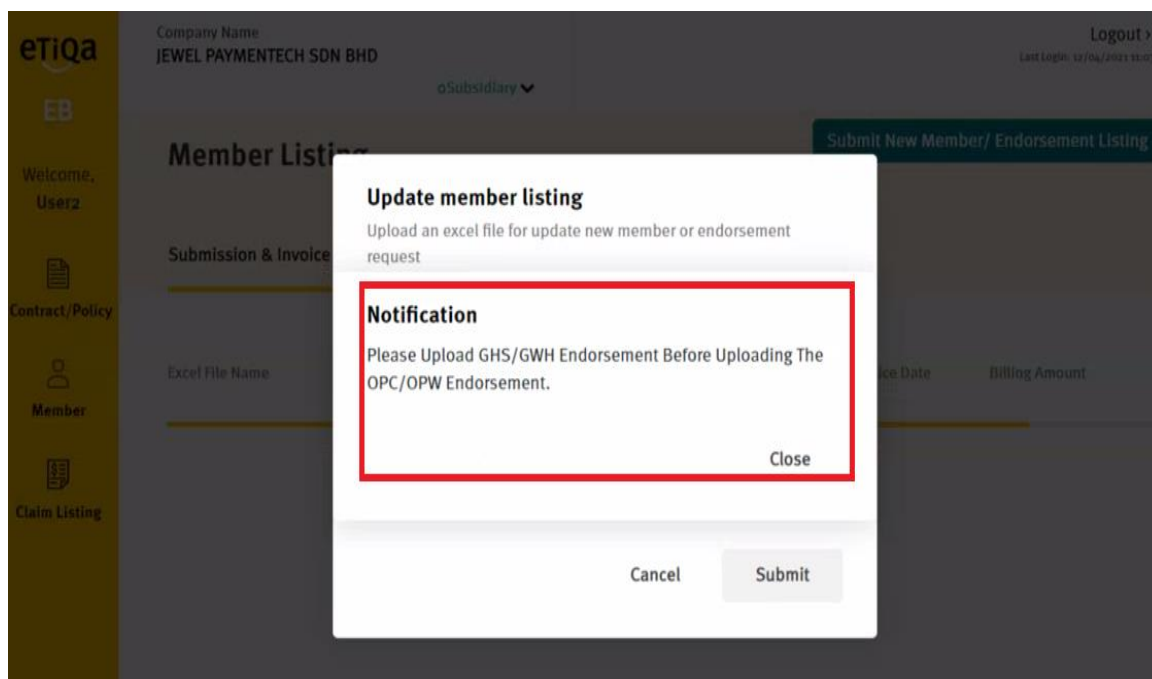


Figure 8: Outpatient Member Upload Notification


- User is allowed to upload member multiple times per day.

Step 3:

- After user successfully submit upload file, system will prompt message to notify successful upload as below



- Upload format, validation and process below:

Items	Description
Upload file	<p>Format: Upload file must be in excel.xlsx file format.</p> <p>Filename: No standard format for file name. File name must be different from previous successfully uploaded files in portal. One upload file should contain members from one policy only, no mixing of different policies in a single upload file.</p>
Sample of Upload File	<p>Sample of endorsement upload file OPW:</p>  <p>OPW Member upload.xlsx</p>

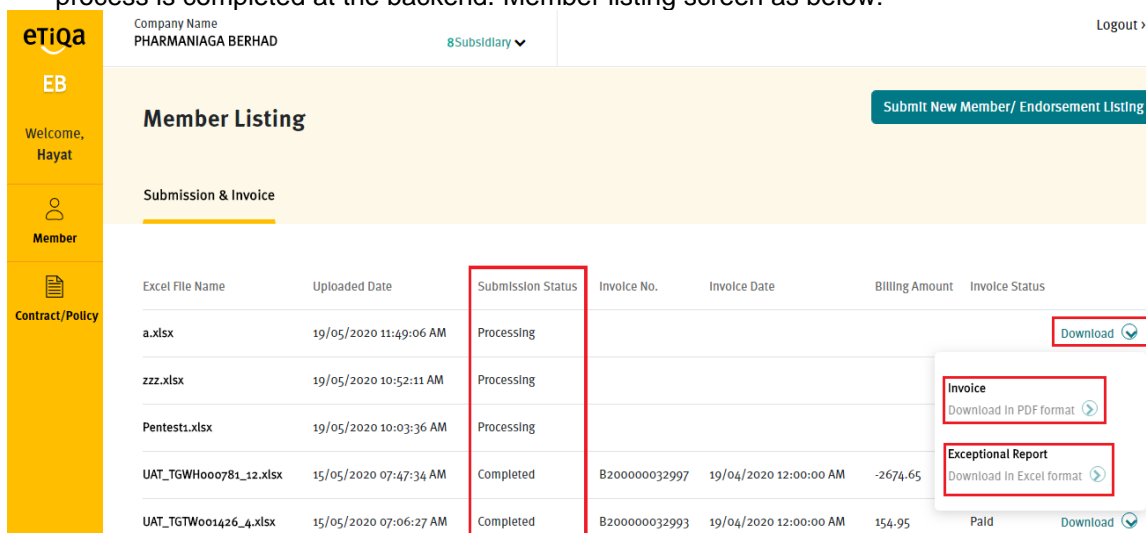


Portal validation upon upload	<p>If user encounters any of the error messages below upon upload, user will need to rectify the error in the upload file and try to resubmit the upload file again. If error persists, user will need to contact EB support at <a href="mailto:ebpolicy@etiga.com.my">ebpolicy@etiga.com.my</a> for assistance.</p> <ol style="list-style-type: none"> <li>Portal will reject and prompt error message if file format is not .xlsx as below: <div data-bbox="578 430 1258 556"> <div>Only .xlsx file allowed</div> <div>OK</div> </div> </li> <li>Portal will reject and prompt error message if file name is the same as below: <div data-bbox="578 661 1258 787"> <div>File exists in system. Kindly rename file name and upload again</div> <div>OK</div> </div> </li> <li>Portal will reject and prompt error message as below if no mandatory fields are present in upload file: <div data-bbox="578 892 1258 1018"> <div>No mandatory headers found</div> <div>OK</div> </div> </li> <li>Portal will reject and prompt error message as below if there are more than 40 fields present in upload file: <div data-bbox="578 1123 1258 1270"> <div>Number of column in upload file could not exceed 40</div> <div>OK</div> </div> </li> <li>If user upload file consisting of duplicated mandatory fields, portal will reject and prompt error message as below: <div data-bbox="578 1375 1258 1522"> <div>Duplicated fields found in the file 'Name' and 'Employee Name'</div> <div>OK</div> </div> </li> <li>If there are any duplicated values under Member/Dependent NRIC, portal will reject the upload file and prompt error message as follows: <div data-bbox="578 1669 1258 1816"> <div>Duplicate values under *Member/Dependant NRIC</div> <div>OK</div> </div> </li> </ol> <p>For the example below, portal will reject the upload file due to duplicated values in the member/dependent NRIC field.</p>
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*Member Coverage Commencement Date	*Member/Dependant Name	*Gender	*Member/Dependant NRIC
20180101	ETIQAMSK	001	80122808xxxx
20180101	ETIQAMSK	001	61011611xxxx
20180101	ETIQAMSK	001	72071503xxxx
20180101	ETIQAMSK	001	80122808xxxx

If there is only one blank value in the field, portal will not reject. If there are more than one blank values, portal will take the blank values as duplicates and reject the upload file.

- After upload file successfully submitted, submission status of the upload will be updated to 'processing'.
- Submission status will change from 'processing' to 'completed' when the entire upload process is completed at the backend. Member listing screen as below:



Excel File Name	Uploaded Date	Submission Status	Invoice No.	Invoice Date	Billing Amount	Invoice Status
a.xlsx	19/05/2020 11:49:06 AM	Processing				
zzz.xlsx	19/05/2020 10:52:11 AM	Processing				
Pentest1.xlsx	19/05/2020 10:03:36 AM	Processing				
UAT_TGWH000781_12.xlsx	15/05/2020 07:47:34 AM	Completed	B200000032997	19/04/2020 12:00:00 AM	-2674.65	
UAT_TGTW001426_4.xlsx	15/05/2020 07:06:27 AM	Completed	B200000032993	19/04/2020 12:00:00 AM	154.95	Paid

Figure 9: Member Listing Screen

- After submission status turns to 'completed' for a particular upload, portal user will be able to download the exceptional file to view failed cases and download the invoice containing members successfully added at the 'download' tab in figure 15 above.

#### Sample of exceptional file:



Exceptional File  
Corporate Portal.csv

#### Sample of invoice:



GWH\_EB\_TGWH000  
781\_1\_AC-009166\_20

- Details of information displayed on the member listing screen as below:

Field Name	Description	Sample Value
Excel File Name	File name of user upload file	Memberupload_Etiqa.xlsx
Upload Date	Date when file is uploaded	30/03/2020 10:30:24 AM
Submission Status	Status is 'processing' after upload successful and will be changed to 'completed' once the entire upload process is completed	Processing
Invoice No.	Billing number of the billing generated for the upload file	B12345
Invoice Date	Billing date	30/03/2020
Contribution	Billing amount	RM 520.00
Invoice Status	Billing status	Confirmed