

# The Adviser Portal

Adviser Guide



October 2025



# Contents



## Home dashboard

-  [Dashboard](#)
-  [Preferences](#)





## Quote, Apply & Alterations

-  [New Zurich / OnePath Policy](#)
-  [Increase Quote & Apply](#)
-  [Zurich Quote & Apply tips](#)
-  [OnePath Quote & Apply tips](#)
-  [Policy Alteration/Projection](#)
-  [Change of Ownership Application](#)



## Applications

-  [Applications in progress](#)
-  [Tele-Interview booking tool](#)




## My Clients

-  [Client details](#)
-  [Update payment details](#)
-  [Policy details](#)
-  [Provide Third Party Authority](#)
-  [Cancel a policy](#)
-  [Reinstate & Make a Payment](#)




## Portfolio Insights

-  [Birdseye view of your book across Zurich & OnePath](#)





## Renewals

-  [Track a variety of notices](#)  
(Anniversary, Overdue, Cancellation etc)





## Claims

-  [Lodge claims for Zurich & OnePath policies](#)
-  [View claims information & assessor contact details](#)






## Service Requests

-  [Track open & closed Service Requests](#)
-  [Submit New Requests](#)



## Tools & Resources

-  [Zone Education](#)
-  [Reports](#)
-  [Data feeds](#)



## Multi Factor Authentication - MFA

-  [Extra layer of security, protecting yours and your client's data](#)

# Home Dashboard

**A** **New Policy Quotes** [+Create new quote](#)

Reference number	Life insured	Date of birth	Date last updated	Status
Q002887115	Smith A	1/1/1980	9/9/2025	Unsubmitted application
I064348904	Joseph TestONLY	1/5/1983	26/8/2025	Unsubmitted application
Q002887791	Test Test	20/5/1985	21/8/2025	Unsubmitted application
Q002887087	Test Test	1/1/1989	5/8/2025	Unsubmitted application
Q002887114	Smith A	1/1/1980	13/6/2025	Quote

[View more quotes >](#)

**B** **Applications**

Life insured
uipathillus C0940003011
Lucian Herman
Trudie Tumlinson
Alene Gulbranson
Shaneka Oxendine

**C** **Claims**

Claim No.	Policy No.	Claim type	Life insured	Policy owner	Status
		Death			Notified
		Income Protection			Notified
		Income Protection			Notified
		Death			Notified
		Death			Notified

[View more claims >](#)

**D** **Renewals**

- 0 Cancellation advice >
- 39 Approaching cancellation advice >
- 6 Overdue reminder >
- 26 Unsuccessful premium deduction notice >
- 621 Anniversary notice >

**E** **Service requests**

- 51 Open >
- 16 Recently completed >

**F** **Andrew Prior TEST**

- Preferences
- Logout

**A** Access unsubmitted quotes & applications

**B** Track and manage applications in suspense

**C** Monitor ongoing claims

**D** Keep up to date with the various notices under Renewals

**E** Track open and closed Service Requests

**F** Set up notifications using the notifications panel, or by selecting "Preferences" from the top right drop down



# Home Dashboard

## Preferences

**Preferences** **A** **B** **C** **D** **E**

My details | Security Preferences | Delegate my access | Access delegated to me | **Notification preferences**

**New business**

- New adviser note
- New requirement
- Policy inforce

**Renewals**

- Approaching cancellation advice
- Cancellation advice
- Cover increase advice
- Direct debit dishonour
- Overdue reminder
- Renewal advice

**Service request**

- New comment

**Weekly summary**

- Dashboard summary email

- A** Update your contact details
- B** Change password, update MFA preference
- C** Delegation allows an adviser to delegate complete client access to support staff registered to the portal
- D** Track who has delegated access to you
- E** Keep up to date by using the notification preferences tab

# Quote, Apply & Alterations

Home Quotes Applications My clients Renewals Claims Service Requests Insights Tools &

New Zurich Policy  
New OnePath Policy  
Policy Alteration / Projection

**+Create new quote**

Reference number	Life insured	Date of birth	Date last updated	Status
Q002887115	Smith A	1/1/1980	9/9/2025	Unsubmitted application
I064348904	Joseph TestONLY	1/5/1983	26/8/2025	Unsubmitted application
Q002887791	Test Test	20/5/1985	21/8/2025	Unsubmitted application
Q002887087	Test Test	1/1/1989	5/8/2025	Unsubmitted application
Q002887114	Smith A	1/1/1980	13/6/2025	Quote

View more quotes >

**Applications**

Life insured	Date received	Status
uipathillus C0940003011	10/09/2025	In Progress
Lucian Herman	09/09/2025	In Progress
Trudie Tumlinson	09/09/2025	In Progress
Alene Gulbranson	09/09/2025	In Progress
Shaneka Oxendine	09/09/2025	In Progress

View more applications >

- Access both Zurich & OnePath quoting software
- Single sign-on. No need for multiples logins when launching quoting software
- Create alterations & projections for inforce policies
- Generate and submit COO applications for eligible OneCare policies via Policy Alteration
- Submit reduction alterations on Zurich & OnePath policies

Applications My clients Renewals Claims Service Requests Tools & Resources \_ZONE

Ask a Question Give Feedback Andrew Prior

Ver: 1.0.80 Settings Logout

## Saved quotes and unsubmitted applications

Live applications Archived Create a new quote

Life insured	Reference number	Date of birth	Date last updated	Status	Client status
Fake Fake	I320682559	06/11/1987	2 hours ago	Unsubmitted application	
Troy Lowrie	I005419397	14/05/1969	09/09/2025	Unsubmitted application	
Dakota Xuereb	I932428116	01/08/2003	01/09/2025	Unsubmitted application	
Fake Fake	I921397071	04/06/1978	23/07/2025	Unsubmitted application	Expired
Marielle Roppolo	I353519435	03/11/2003	24/06/2025	Quote	
John Fake	I565277540	31/12/1974	20/06/2025	Unsubmitted application	Expired
Andrew Prior	I714502415	06/11/1987	05/06/2025	Unsubmitted application	
Andrew Prior	I171065032	22/05/2025		Unsubmitted application	Expired
Antonio Perre	I319100207	18/06/1990	13/05/2025	Quote	
Andrew Junior	I700978391	01/05/2001	03/04/2025	Submitted application	

10 entries per page Showing 1 to 10 of 18 entries

## Quotes Dashboard

Wealth Protection Active Active Cover Income Safeguard

A.Prior-1 Total \$1,486.95

Edit Illustrate Download PDF Duplicate Compare Scenarios Pre-Assessment / Loadings

### Andrew Prior

Life Insured: 38 year old Male, NSW, Non-smoker, \$100,000 Financial planner - degree and min 2 years exp (or no degree and 5 years exp), earning between \$100k-\$120k

Quotes: A.Prior-1 \$1,486.95 Protection Plus Income Safeguard

Application: Contact Details Ownership Beneficiaries Payment Details Completion Method Life Insured Statement Submission Confirmation

#### Protection Plus

Ownership: Super - SMSF/External trustee Total Super: \$360.27 / yr

Super Frequency: Yearly Super Payment: Direct debit

Purpose: Personal only Commission: Hybrid Premium disc %: 0.00%

Selection pricing: Lower upfront pricing- Smart Value Discount: Auto

Waive policy fee (AG) Indexation Premium waiver Death Cover

Variable Age-Stepped \$ 1,000,000 Variable Age-Stepped

Death Cover Includes SmartValue (15.0%) \$360.27 / yr

TPD Cover (standalone) Trauma Cover (standalone) Continuous Care Option (standalone)

Annualised Total \$1,486.95

Back Continue to application

Edit Illustrate Download PDF Duplicate Compare Scenarios Pre-Assessment / Loadings

Online Manual

Complete an online pre-assessment which provides you with an automatic decision

How to get an instant pre-assessment

1. Click 'Start questionnaire' below.
2. Answer only questions relevant to your client and the policies you've selected.
3. Receive an automated decision complete with any loadings that will update your quoted premiums.



- A** Create Zurich new quotes & applications
- B** Pre-assess your clients using the online pre assessment tool
- C** Set preferences for your default quote & apply settings (Payment method, premium type, ownership etc)
- D** Add additional scenarios
- E** Compare quote scenarios

# Quote & Apply

ZLQ – Change of Ownership via New Business Quote – Zurich only



**\*Adviser generates a “dummy” new business quote to replicate the cover in the manual quote and proceed to application.**

Process	Requirements	Form signed by/change requested by	Send to
Cancel and replace due to change of ownership	<ul style="list-style-type: none"><li>Quote and apply via the Adviser Portal, or</li><li>Quote via Adviser Portal, and</li><li>New application with no Life Insured Statement required via Zurich Life Quotes, ensuring signed quote is attached, and</li><li>Cancellation letter signed by previous policy owner.</li><li><a href="#">Zurich Insurance-only Superannuation Plan – Membership application</a> (for cancel and replace to Zurich Trustee only)</li></ul>	Policy Owner	New Business

## Completion Method for Fake Fake

### Life Insured's Statement completion methods:

You can complete the Life Insured's Statement electronically and receive an immediate underwriting decision. Alternatively, the Life Insured's Statement can be submitted to Zurich for tele-interviewing. Each life to be insured on the application can select a different completion method.

Please be aware that each life to be insured and policy owner has a duty to take reasonable care not to make a misrepresentation, as outlined in this application and in the relevant Product Disclosure Statement (PDS).

### Proceed with

Online application | Tele-interview | Client completion | **LIS not required** ⓘ

**A**

**B** Please provide a brief description as to the purpose of this new quote/application, including any existing policy or application numbers

## Submission

### Additional attachments

If you would like to provide any additional documents to assist Zurich with reviewing your application, please upload them below.

**C**

**A** On the Completion Method tab, select “LIS not required” to bypass underwriting.

**B** In the box provided, input “Change of ownership of policy XXXX from XXXX owned to XXXX owned” or similar

**C** On the Submission tab, upload the signed quote and cancellation letter.

# Quote & Apply

Zurich – Submit with multiple policies / owners / purpose

Wealth Protection | Active | **B** + Protection Plus | + Income Safeguard | + Business Expenses

F.Fake-1  
Total \$0.00

Edit | Illustrate | Download PDF | Duplicate | Compare Scenarios

**A** Protection Plus Remove | Ownership: Super - Zurich Insurance-only

Super Frequency: Yearly | Super Payment: Rollover | Commission: Hybrid | Premium disc %: 0.00%

**A** Purpose: Personal only | Special Discount Code: Select

Selection pricing: Lower upfront pricing...

**Death Cover**

Variable Age-Stepped  
\$ 1,000,000 | Variable Age-Stepped

Add Linked TPD  
Add Linked Trauma

**TPD Cover (standalone)**

**Trauma Cover (standalone)**

**A** Variable Age-Stepped  
\$ [ ] | **Please add another Protection Plus policy with non-super ownership for the standalone Trauma cover**

An optimised super policy arrangement requires split trauma and/or TPD cover

Wealth Protection | Active | + Protection Plus | + Income Safeguard | + Business Expenses

F.Fake-1  
Total \$0.00

Edit | Illustrate | Download PDF | Duplicate | Compare Scenarios

**C** > Protection Plus Remove | Ownership: Super - Zurich Insurance-only

**A** Protection Plus Remove | Ownership: Non-super

Non-super Frequency: Monthly | Non-super Payment: Direct debit

**D** Purpose: Key person | Commission: Hybrid | Premium disc %: 0.00%

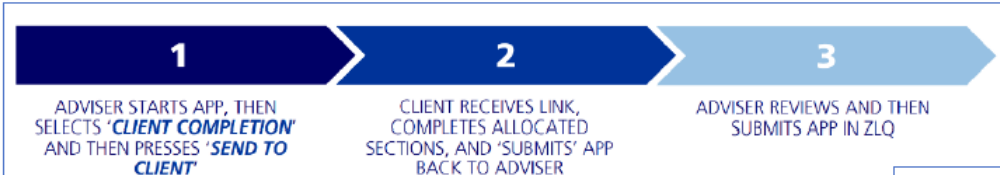
Business future cover: None | Selection pricing: Lower upfront pricing...

Special Discount Code: Select | Smart Value Discount: Auto

- A** When Life is in Super and you want to add standalone Trauma, or want multiple purposes, you will need to add another policy.
- B** Click on + Protection Plus to create a second policy.
- C** The first policy will cut down to one line.
- D** Second policy is added, example – add Key Person cover.
- E** Not to be confused with adding a Scenario, which is a comparison tool.

# Quote & Apply

## Zurich – Client Completion



Reminders Triggered  
Day 3, 7 and 14

• EXPIRED LINK\* – after 21 days or 3 failed attempts by the client

Quotes Dashboard
**Completion Method for Mr Client**
Create a new quote

**Mr Client**

- Life Insured
- Quotes
- Application
- Contact Details
- Ownership
- Beneficiaries
- Payment Details
- Completion Method**
- Life Insured Statement
- Submission
- Confirmation

**Proceed with**

Online application **D** | Tele-interview | **Client completion** | LIS not required

The Life Insured's Statement captures the following information:

- Details of occupation, income and any existing insurance
- Details of lifestyle, including pastimes, travel plans, alcohol and smoking status
- Current height and weight
- Details of personal medical history and usual doctor's information
- Details of family history.

All questions in the Life Insured's Statement need to be answered by the life to be insured.

**Notice to Life Insured:**

For Life Insured's Statements completed online electronically or via tele-interview, the information collected is sent back to you as a completed Life Insured's Statement for you to check and confirm.

You must check the information we recorded for any errors or omissions. Your duty to take reasonable care not to make a misrepresentation or continue to apply after the application has been submitted or the telephone interview has been completed. If any information we received or recorded is incorrect, incomplete or omitted, you must inform us about the correction, omission or additional information within 5 days of your receiving the written copy of the information. If you do not, inform us about the correction, omission or additional information within this time, you may fail to comply with your duty to take reasonable care not to make a misrepresentation. The consequences of failing to comply with your duty to take reasonable care not to make a misrepresentation are detailed later in this application.

**Client details**

Mobile phone: 0414 000 000  
Client email: test@hotmail.com

**Notes for Client**

**Pages to share**

Contact Details  
 Beneficiaries  
 Life Insured Statement

**C** Cancel client access

Contact Details  
 Beneficiaries  
 Life Insured Statement

**E** Send to client

### Saved quotes and unsubmitted applications

Live applications		Archived			
Life insured search	Quote ID search	Status filter: All			
Life insured	Reference number	Date of birth	Date last updated	Status	Client status
Mr Client	I443830767	01/01/1980	0 minutes ago	Unsubmitted application	Waiting for client <b>A</b>

- A** Client completion status, Adviser will receive notification when complete
- B** Navigate to Completion Method tab to change method or resend the link
- C** Revoke the access from the client
- D** Select the method or
- E** Resend link (button changes to "Send to client")

**\*\*Note\*\***

If email address needs changing after you've sent the link, revoke the access first, update the email address and re-send the link

# Quote & Apply

Zurich – Altering Life Insured Statement (LIS) mid application



Adviser completes LIS	Change to Tele interview Change to Client Completion	Yes Yes
Tele Interview	Change to Adviser Change to Client Completion  <b>App to be resubmitted</b>	<b>No</b> <b>No</b>
Client Completion	Change to Adviser Change to Tele Interview	Yes Yes

# Quote & Apply

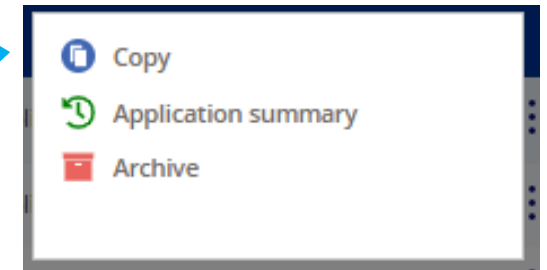
Zurich – Copy & Resubmit an application

## Saved quotes and unsubmitted applications

**Live applications** Archived Create a new quote

Life insured search Quote ID search Status filter All

Life insured	Reference number	Date of birth	Date last updated	Status	Client status	
John Fake	I565277540	31/12/1974	0 minutes ago	Unsubmitted application	Expired	⋮ <b>A</b>
Troy Lowrie	I005419397	14/05/1969	0 minutes ago	Unsubmitted application		⋮
Fake Fake	I921397071	04/06/1978	0 minutes ago	Unsubmitted application	Expired	⋮



## Saved quotes and unsubmitted applications

**Live applications** Archived Create a new quote

Life insured search Quote ID search Status filter All

Life insured	Reference number	Date of birth	Date last updated	Status	Client status	
<b>B</b> John Fake	I494865777	31/12/1974	0 minutes ago	Quote		⋮
John Fake	I565277540	31/12/1974	4 minutes ago	Unsubmitted application	Expired	⋮
Troy Lowrie	I005419397	14/05/1969	4 minutes ago	Unsubmitted application		⋮

**A** On the quote or application, click the three dots next to the quote or application you're wanting to duplicate and select "Copy"

**B** A new quote will appear on the dashboard, where the adviser can access, amend and resubmit

# Quote & Apply

Zurich – Quote error (Pre assessment)

M.Client-1  
Total \$0.00

Edit Illustrate Download PDF Duplicate Compare Scenarios Pre-Assessment / Loadings

Please review the details of your pre-assessment.

Ownership Super - Zurich Insurance-only

Non-super Frequency Monthly  
Super Frequency Yearly  
Purpose Personal only  
Selection pricing Lower upfront pricing...  
Smart Value Discount Auto  
 Waive policy fee (AG)  
 Indexation  Premium waiver  
 Death Cover  
Variable Age-Stepped \$ 1,000,000 Variable Age-Stepped Includes SmartValue (5.0%)  
Add Linked TPD  
Trauma Linked Remove  
Variable Age-Stepped  Trauma reinstatement Includes SmartValue (5.0%)

Annualised Total \$0.00  
Total net of tax rebate \$0.00

Back Continue to application

\*Superannuation optimiser applies. Refer to your PDS for more information.

M.Client-1  
Total \$0.00

Edit Illustrate Download PDF

Online Manual

Pre-Assessment Method Select

M.Client-1  
Total \$235.69

Edit Illustrate Download PDF

Online Manual

Complete an online pre-assessment which automatic decision

- A When premium won't calculate, reflecting \$0
- B Check Edit / Illustrate at the top (hovering over the error will help you resolve the problem)
- C Click the Pre-Assessment / Loadings button
- D A manual Pre-Assessment has been started
- E Click Online
- F Click Edit to go back to the quote

### Ownership for Mr Client

**Owner #1 for Protection Plus** (Type: Personal, Cover: Death) [Remove](#)

Pre-fill from  
Find an existing owner

**Owner details**

Company Search  
Type here to search

→ Or Enter the company manually

Company Name  
A and B Smith

Company ABN or ACN  
123456789

Contact name  
A Smith

Email  
smith@hotmail.com

Please enter a valid ABN

**A** Error when manually adding ABN/ACN

### Ownership for Mr Client

**Owner #1 for Protection Plus** (Type: Personal, Cover: Death) [Remove](#)

Pre-fill from  
Find an existing owner

**Owner details**

Company Search  
Type here to search

Or Enter the company manually

Company Name  
A and B Smith

Company ABN

Contact name  
A Smith

Company contact phone

Email  
smith@hotmail.com

**B** The solution is to remove the ABN/ACN which will allow you to progress with the application

- A** Error when submitting application
- B** Adviser has accidentally added a Life Insured, creating a joint application
- C** Click on the added Life Insured profile
- D** Navigate to the Delete button to remove

**A** + Add New Quote   Recent Quotes   Applications   Incomplete TI/Client URL   External Quotes

Displaying recent quotes for Andrew Prior. Please note: alterations to existing policies cannot be processed using Illustrator. To obtain a quote for an alteration to an existing policy, please contact OnePath's Risk Adviser Services on 1800 222 066.

Quote #	Lives	Status	Reference	Modified By	Modified On	Action
Q003316641	Fake Name	Incomplete Application		Andrew Prior	22 Jan 2025 02:46 PM	<a href="#">open</a> <a href="#">delete</a>
Q003316606	Andrew Prior	Incomplete Application		Andrew Prior	22 Jan 2025 02:23 PM	<a href="#">open</a> <a href="#">delete</a>
Q003313892	Andrew Prior	Quote		Andrew Prior	17 Jan 2025 11:48 AM	<a href="#">open</a> <a href="#">delete</a>
Q003268039	Fake Name	Incomplete Application		Andrew Prior	29 Nov 2024 09:54 AM	<a href="#">open</a> <a href="#">delete</a>
Q003278831	Andrew Prior	Incomplete Application		Andrew Prior	29 Nov 2024 09:34 AM	<a href="#">open</a> <a href="#">delete</a>
Q003278824	Andrew Prior	Quote		Andrew Prior	29 Oct 2024 10:37 AM	<a href="#">open</a> <a href="#">delete</a>
Q003278242	Jane Smith	Quote		Andrew Prior	29 Oct 2024 10:37 AM	<a href="#">open</a> <a href="#">delete</a>
Q003277090	Person 1	Quote		Andrew Prior	25 Oct 2024 09:36 AM	<a href="#">open</a> <a href="#">delete</a>
Q003265200	Andrew Prior	Quote		Andrew Prior	03 Oct 2024 10:16 AM	<a href="#">open</a> <a href="#">delete</a>
Q003237862	Andrew Prior	Incomplete Application		Andrew Prior	02 Oct 2024 11:31 AM	<a href="#">open</a> <a href="#">delete</a>

### Life insured details for Fake Name

First Name: Fake   Surname: Name   Date of Birth: 1-Jan-1991   Age: 34   State: NSW   Gender: **Male** Female

Employment Status: Employed   Principal Occupation: Accountant/auditor - degree qualified   Smoker: **Smoker** Non-smoker

Annual Income (excluding super): \$125,000   Annual Super: **None**   Super Percent: %   Super Amount: \$

Existing OneCare: **Yes** No   Continuation Option: Yes No

Existing Insurance > Pre-assessment/Loadings > Cover Summary   **+ Add Covers**

---

### Policy 1 - Non Super

Payment Method: Direct Debit   Payment Frequency: **Monthly** Half-yearly Annually   Policy Type: Create a new policy

Life with optional Trauma and TPD   Non-Super Premium: \$26.08 Monthly

Benefit Payment Type: **Lump Sum** Monthly Instalment   Purpose of Cover: **Personal only** Buy/Sell Key person Loan protection

Life Benefit: \$1,000,000    Premium Waiver Disability

Trauma Benefit: \$   Trauma Definition: \_\_\_\_\_

TPD Benefit: \$   TPD Definition: \_\_\_\_\_

### Policy Summary

Remuneration: Commission

Commission Type: Upfront (H4ybrid)

Package Discount: None

Policy 1 Premium: **\$26.08** Monthly

**+ Add Policy / Life**   **Save Quote**   **Back to Quote List**   **PDF Quote**   **Start Application**

**B** Pre-assessment Options

Select the pre-assessment type:

Online    Manual

Use the online OPERA pre-assessment calculator to receive an indicative decision.

**Continue**   **Cancel**

- A** Create OneCare quotes & applications via Illustrator
- B** Pre-assess your clients using the online pre-assessment tool
- C** Apply a package discount with up to 10 lives (Family or Business)
- D** Download PDF quote
- E** Provide details of existing OneCare cover

# Quote & Apply

OnePath – Submit with multiple policies / owners / purpose

**Life insured details for Ms Client**

First Name Ms	Surname Client	Date of Birth 1-Jan-1990	Age 35	State QLD	Gender Male Female
Employment Status Employed	Principal Occupation Accounts clerk	Smoker Smoker Non-smoker		Existing OneCare Yes No	
Annual Income (excluding super) \$60,000	Annual Super None	Super Percent %	Super Amount \$	Continuation Option Yes No	

Existing Insurance > Pre-assessment/Loadings > Cover Summary > **+ Add Covers** **C**

---

P1/P2 - OneCare Super **A** P3 - Non Super **E**

**Policy 1 - OneCare Super** **Policy 2 - Non Super**

Payment Method: Direct Debit Payment Frequency: Monthly Half-yearly Annually

**Policy 1 Covers**

Life with optional Trauma and TPD Super Premium: \$23.25 Monthly, Non-Super Premium: \$0.00 Monthly

Life Benefit \$1,000,000	Purpose of Cover <b>Personal only</b> Buy/Sell Key person Loan protection <b>B</b>
Trauma Benefit \$	<input type="checkbox"/> Premium Waiver Disability
TPD Benefit \$	TPD SuperLinking SuperLink/Super Non Super

Head Office: Limited User Rate Stream: 8D KickStart version:  Large Case

**Policy Summary**

Remuneration: Commission Upfront (H4ybrid) Package Discount: None Policy 1 Premium: **\$23.25** Monthly

**+ Add Policy / Life** **D** Save Quote Back to Quote List PDF Quote Start Application >

P1/P2 - OneCare Super P3 - Non Super **E**

**Policy 3 - Non Super**

Payment Method: Direct Debit Payment Frequency: Monthly Half-yearly Annually

Life with optional Trauma and TPD

Benefit Payment Type <b>Lump Sum</b> Monthly Instalment	Purpose of Cover Personal only <b>Buy/Sell</b> <b>F</b>
Life Benefit \$1,000,000	<input type="checkbox"/> Premium Waiver Disability

- A** Policy 1 & 2 is superlinked cover.
- B** Personal purpose selected.
- C** Add Covers will add more under the original Policy 1 & 2.
- D** Add Policy / Life will add a third Policy that can have different ownership / purpose.
- E** Policy 3 cover.
- F** Buy/Sell purpose selected.

# Quote & Apply

## OnePath – Quoting Super & Non-Super cover

The screenshot displays the 'Add Policy' interface. On the left, a sidebar lists 'Policy Ownership' options: Non Superannuation, Super – OneCare Super (including rollovers) (selected), External Super - Issued to a SMSF, and External Super - Issued to a Master Trust. Below this are 'SuperLink' options, including 'Create as SuperLink arrangement' (checked). A 'Cover Required' section lists various coverages with checkboxes. The 'Life with optional Trauma and TPD' option is checked. On the right, the 'Policy 1 - OneCare Super' summary shows 'Payment Method' as Direct Debit and 'Payment Frequency' as Annually. The 'Life with optional Trauma and TPD' section shows a Life Benefit of \$1,000,000 and a Purpose of Cover of Personal only. The Trauma Benefit field is greyed out. A 'Premium Waiver Disability' checkbox is present. A second 'Add Policy' window is overlaid at the bottom, showing the 'Cover Required' table with columns for Super and Non Super.

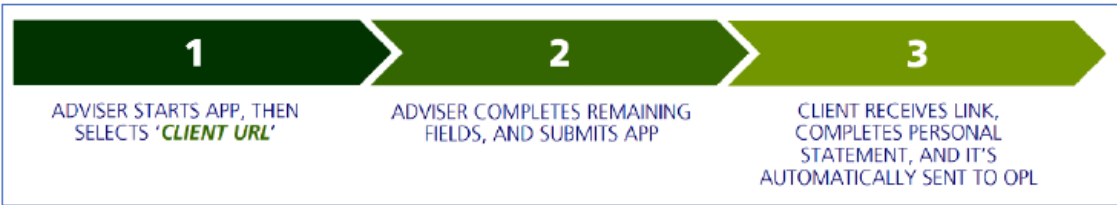
Cover Required	Super	Non Super
Life with optional Trauma and TPD	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Stand Alone Trauma with optional TPD	<input type="checkbox"/>	<input type="checkbox"/>
Stand Alone TPD	<input type="checkbox"/>	<input type="checkbox"/>
Income Secure Cover	<input type="checkbox"/>	<input type="checkbox"/>
Business Expense Cover	<input type="checkbox"/>	<input type="checkbox"/>
Living Expense Cover	<input type="checkbox"/>	<input type="checkbox"/>
Extra Care Cover	<input type="checkbox"/>	<input type="checkbox"/>
Child Cover	<input type="checkbox"/>	<input type="checkbox"/>

- A** Selecting Super ownership will create one Super owned policy.
- B** Selecting Life with optional Trauma & TPD won't allow for a non-super policy to be added, despite "Trauma" used in the wording, it's misleading.
- C** Trauma is greyed out because your set up was Super only.
- D** At set up, tick the SuperLink box.
- E** Super and non-super ownership is allowed.

\*\*Note – ownership cannot be changed in the quote. A new quote needs to be created from the start.

# Quote & Apply

## OnePath – Client URL



[+ Add New Quote](#)
[Recent Quotes](#)
[Applications](#)
[Incomplete TI/Client URL <sup>A</sup>](#)
[External Quotes](#)

Current Adviser: Andrew Prior

ⓘ Displaying outstanding Personal Statements for Andrew Prior. To cancel a Personal Statement, please contact OnePath on 1800 751 983.

Lives	Submission Date	Assigned To	Status	Expiry Date	Last Accessed Date	Action
Daisy Duck	28 Jun 2024	Client URL	Not accessed	26 Jul 2024		resend email <sup>B</sup> change method

### OneCare Application Summary

**Lives Insured**

Please complete the life and existing insurance details sections. Once complete, you can then access the Personal Statement

Life	Existing Insurance	Personal Statement
✓ Mr Training Client, 01-Jan-1980 <a href="#">edit</a>	✓ No existing insurance <a href="#">edit</a>	✓ Client URL <sup>D</sup> <a href="#">edit</a> <a href="#">review</a>

### Important information - Mr Training Client (1-Jan-1980)

How would you like to complete your Personal Statement?

[Express](#)
[Client URL](#)
[Tele Interview <sup>D</sup>](#)

Time	Action	Comment
Day 29	Cancelled <sup>E</sup>	Cancelled due to expiration
Day 29	Client expiry email sent	
Day 21	Client reminder email sent	
Day 14	Client reminder email sent	
Day 7	Client reminder email sent	
Day 3	Client reminder email sent	
Day 0	Queued	

### Edit Completion Details

Daisy Duck

Completion Method

Adviser

Client URL <sup>C</sup>

Email Address

disney@disney.com

**Please note:**

Updates to the mobile phone or email address above will be used for completion of the Personal Statement only. You will need to contact OnePath to permanently update these details.

OK Cancel

- <sup>A</sup> Applications waiting for Tele Interview or Client URL
- <sup>B</sup> For Client URL, links can be resent
- <sup>C</sup> Completion method can be changed to Adviser
- <sup>D</sup> Completion method to Tele Interview from within the Application
- <sup>E</sup> After link expires, application needs to be resubmitted

# Quote & Apply

## Policy Alteration/Projection

**Policy Alteration Quotes / Projections**

+ New Policy Alteration Quote

Here you can create a new Policy Alteration Quote, and view all previously created Quotes. If you have submitted a quote as a Policy Alteration Request, you can track the status of its submission here.

Search by Quote / Policy / Life Insured / Policy Owner

Created Date	Quote	Description	Status	Policy Number	Life Insured	Policy Owner	Premium	Expiry Date	Actions
11/02/2025	PQ-280225	CP off	Active	90424205	Affie Aebersold	Affie Aebersold	\$313.94	12/04/2025	Actions
10/02/2025	PQ-280221								
23/01/2025	PQ-280082								
05/11/2024	PQ-279775								
05/11/2024	PQ-279774								
05/11/2024	PQ-279772								
01/11/2024	PQ-279771								
31/10/2024	PQ-279770								
31/10/2024	PQ-279769								

**New Policy Alteration Quote / Projection**  
Policy 77001640

Quote Expiry: 12/04/2025  
Quote Date (for testers): 11 Feb 2025

77001640 - OneCare Non-super

Payment Frequency: Monthly  
State: ACT

Discounts: No records found

UIPTHILLUS C0940001373  
Sex: Male  
Date of Birth: 01/01/1970  
Age: 54

Smoker Status: Non-Smoker

Life with optional Trauma and TPD

Life Cover

Cover Amount: 500,000  
Value Protector option:   
Premium: \$77.83 /mth

Premium Type: Variable Age-Stepped  
Premium Waiver Disability option:   
Business Guarantee option:

- Generate alteration quotes on inforce Wealth Protection, OneCare, Active policies & more
- Quotes are valid for 60 days
- Submit decreases without a client signature from the new alteration quote screen.
- Reduce & increase sums, add covers, change waiting/benefit period, change occupation class & more
- Generate Change of Ownership quotes on eligible Wealth Protection & OneCare policies.

# Quote & Apply

## Change of Ownership

**A**

Policy Alteration Quote / Projection

Test  
Policy 77001645 - PQ-279772

View Quote PDF Start Application

Quote Expiry: 01/01/2025  
Quote Date (for testers): 05/11/2024

Replacement Policy 1 - OneCare Non-super

Payment Frequency: Monthly  
State: ACT  
Non-Super Payment Method: Direct Debit

Discounts: No records found

UIPHILLUS C0940001378  
Sex: Male  
Date of Birth: 01/01/1970  
Age: 54

Smoker Status: Non-Smoker

Add Cover

- A** Three simple steps to complete a Change of Ownership application
- B** Once the quote has been created, select start application from the quote screen and follow the prompts on the three sections.
- C** Confirm or update contact details of the Life Insured
- D** Confirm new policy owner, be it either a person or a company
- E** Submit the application without requiring a signature

**C**

Change of Ownership Application

Test  
Policy 77001645 - PQ-279772

View Quote PDF Start Application

Life Insured Details Policy Administration Review Application

The life insured details below have been pre-filled for your convenience. If any details are incorrect, you can click on the 'edit' button to update the details. Otherwise, please tick the checkbox to continue.

**Life Insured Details**

**Personal Details**

Title	First Name	Middle Name	Last Name	Date of Birth	Age	Gender	Smoker Status
Mr	UIP		HILLUS	01/01/1970	54	Male	Non-Smoker

**Residential Address**

Address	Suburb	State	Postcode
40 Gruzman View	TAYLOR	ACT	2913

**Contact Details**

Email	Mobile Phone	Home Phone	Work Phone
abc@zurich.com.au	0417147672	N/A	N/A

I confirm that the life insured details displayed are correct.

**D**

Change of Ownership Application

Test  
Policy 77001645 - PQ-279772

View Quote PDF Start Application

Replacement Policy 1 - OneCare Non-super

**Policy Owner Details**

\*You can add up to 2 owners to this policy.

Name	Relationship
+ Add owner	

**Mailing Address**

Nominate alternate address

Address	Suburb	State	Postcode
		State	

Please add at least 1 policy owner

**Payment Details**

Premium Frequency: Monthly

+ Add payment Details

**E**

Change of Ownership Application

Test  
Policy 77001645 - PQ-279772

View Quote PDF Start Application

Review Application

Please review the details below. Note: you must download and review the Application Form PDF before you can submit the application.

**Application Summary**

**Life Insured Details**

Personal Details: Mr UIPhillus C0940001378, 1/01/1970, Male, Non-Smoker, aged 54  
Residential Address: 40 Gruzman View, TAYLOR, ACT, 2913  
Contact Details: abc@zurich.com.au, 0417147672 (M)

**Policy Administration**

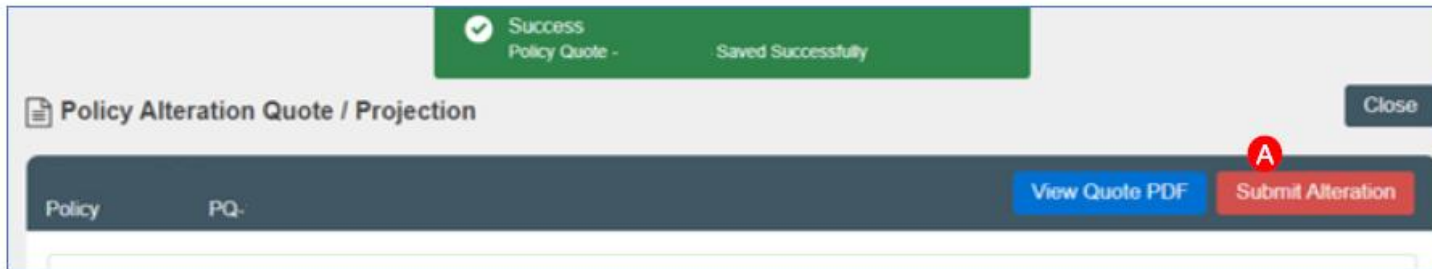
Replacement Policy 1 - OneCare Non-super

Policy Owner	UIPhillus C0940001378
Mailing Address	40 Gruzman View, TAYLOR, ACT, 2913
Payment Details	Monthly, Direct Debit
Loyalty Program	Not eligible for Qantas Frequent Flyer
Nomination of Beneficiaries	Nomination of Beneficiaries Form required

**Adviser Details**

# Quote & Apply

## Change of Ownership via Inforce Quote



After an inforce quote is generated and saved, one of two scenarios will appear:

- A** Submit Alteration button is active, alteration can be submitted
- B** Submit Alteration button is inactive, unable to submit from quote, options are
  - For Zurich – generate quote from NB portal and apply online (see previous slide)
  - For OnePath – complete cancel & replace application with signed quote

# Quote & Apply

OnePath – Altering Personal Statement method (PS) mid application

Adviser completes PS	Change to Tele interview Change to Client URL	Yes Yes
Tele interview	Change to Adviser Change to Client URL  <b>App to be resubmitted, unable to be duplicated, re-create quote.</b>	<b>No</b> <b>No</b>
Client URL	Change to Adviser Change to Tele interview	Yes Yes

# Quote & Apply

Life Insured Statement – Where to find it after submission

Saved quotes and unsubmitted applications

Live applications Archived Create a new quote

Life insured search Quote ID search Status filter All

Life insured	Reference number	Date of birth	Date last updated	Status
Andrew Prior	1199359548	06/11/1987	05/09/2024	Submitted app
Andrew Prior	1414743239	06/11/1987	03/09/2024	Unsubmitted app

Application Full application Client application Copy

- A Click on the 3 vertical dots
- B Click full application

+ Add New Quote Recent Quotes Applications Incomplete TI/Client URL External Quotes

Displaying submitted applications and Personal Statements for Andrew Prior TEST

Lives	Document Type	Reference	Completed By	Completed On	Action
John Fake	Personal Statement	C002887128	Andrew Prior TEST	03 Jun 2025 12:31 PM	view
John Fake	Application Form	C002887089	Andrew Prior TEST	07 May 2025 10:33 AM	view app view quote
John Fake	Application Form	C002887088	Andrew Prior TEST	07 May 2025 10:29 AM	view app view quote

- A Click on Applications
- B Click view

# 🔗 Increase Quote & Apply

## Increase Quote & Apply (Zurich Only)

A

B

C

A

Using the alterations quote screen, create an increase quote. Once saved, select start application to begin.

B

You will be asked to complete an eligibility check, to confirm there are no changes to the client's occupation rating, as only increases to sums insured are currently available.

C

Follow the prompts and answer relevant questions on the LIS. LIS can also be completed as a Tele-Interview.

This feature is only currently available for Zurich products

# Applications

**A** Applications Export Applications

Alert status	Latest adviser note	Life Insured	Date received	Days in progress	Status
No recent updates	No notes	Jonathon McJames	11/02/2025	1	Submitted
No recent updates	No notes	Jonathon McJames	11/02/2025	1	Submitted
No recent updates	No notes	uipath 1000502717	11/02/2025	1	In Progress
No recent updates	No notes	uipathillus C0940002191	11/02/2025	1	In Progress
No recent updates	No notes	Jonathon Smith	11/02/2025	1	Submitted
No recent updates	No notes	Braxton Sponsler	10/02/2025	2	In Progress
No recent updates	No notes	uipathillus C0940002187	10/02/2025	2	In Progress
No recent updates	No notes	uipath 1000502709	10/02/2025	2	In Progress
No recent updates	No notes	uipathillus C0940002184	10/02/2025	2	In Progress
No recent updates	No notes	uipath 1000502704	09/02/2025	3	In Progress
No recent updates	No notes	uipathillus C0940002179	09/02/2025	3	In Progress

**A** View a list of applications in progress using the Applications tab

**B** Track the status using chevrons  
**Submitted** = Zurich have received the application  
**Outstanding Requirements** = Zurich are awaiting outstanding requirements (Medical, financial etc)  
**In Progress** = Zurich are assessing the application  
**Finalised** = A decision has been made to accept or decline

**C** Use the Tele-Interview booking tool to set up a specific time that suits your client best

**B** An underwriting or admin requirement has been raised within the last 72 hours ✕

**Application details: ReferenceFive PhaseOne** Export as PDF

**B** Submitted Outstanding Requirements **In Progress** Finalised

Life insured	ReferenceFive PhaseOne	TFN status	Tax File Number Not Supplied
Date of birth	15/03/1991	Submission date	09/12/2024
Gender	Male		

**Underwriting enquiries**  
 1800 244 306

**General enquiries**  
 1800 500 655   
 adviser.service@zurich.com.au

**C** **Tele Interview Details**

Status: Awaiting Booking Awaiting Tele Interview Tele Interview NPW Tele Interview Complete

Date: 10/12/2024 12:30:PM (AEST)

Policy number	Product	Application type
90427466	Protection Plus	New Business

**Requirements** Benefit details Direct Message Give Feedback for this page

Show outstanding requirements only

Notifications	Status	Date requested
<b>Declaration of Continued Good Health</b> Due to the age of this application a declaration of continued good health may be required upon acceptance.	Requested	08/02/2025



# Applications

Apps in progress

**Application details: Whitney Shaw** Export as PDF

Awaiting Requirements
In Progress
Finalised

**A**

<b>Life insured</b>	Whitney Shaw	<b>TFN status</b>	Tax File Number Not Supplied
<b>Date of birth</b>	29/10/1993	<b>Submission date</b>	30/07/2025
<b>Gender</b>	Female		

**Underwriting enquiries**  
1800 244 306

**General enquiries**  
1800 500 655  
adviser.service@zurich.com.au

Policy number	Product	Application type
91271138	Protection Plus	New Business
91271140	Income Protector	New Business
91271139	Protection Plus	New Business

**D**

**B** Requirements **E** Benefit details Direct Message Give Feedback for this page

Show outstanding requirements only

Medical requirements	Status	Date requested	Date received	Date assessed	Org by	Uploads
<b>Brief Medical Report (BMR) due to Medical History</b>	Requested	05/08/2025			UHG	<b>C</b>

Other requirements	Status	Date requested	Date received	Date assessed	Org by	Uploads
<b>Quote Required due to Missing Information</b> Please provide a separate increase quote to confirm the total sums insured. Additional requirements may be requested depending on the total sums insured being applied for.	Requested	05/08/2025			Adviser	<b>B</b>

Notifications	Status	Date requested
<b>Underwriting (Information Only) due to Medical History</b> On evidence to date, if we can offer cover, 50% loading will apply on Life cover whilst Brain Tumour exclusion to apply to any increase in Income Protection, TPD & Trauma cover	Requested	05/08/2025

**B**

**Upload documents / Add comments**

Or drop files

Zurich doesn't support this file type or more than allowed files are being attached.  
Documents with .bmp,.gif,.jpeg,.jpg,.pdf,.png,.tif,.tiff format can be attached. Maximum of 10 documents can be attached at a time.

**There are no files**

- A** View a summary of the application, including policy number and product.
- B** Review outstanding requirements, and submit them direct against the case using the upload button
- C** Get an update on medical requests via the UHG button
- D** Contact information for underwriters and case management
- E** Send a direct message to or view messages from your case manager or underwriter

# My Clients



# My Clients

## Client details

A

**Clients**

Show filters

Until recently, we have not recorded beneficiaries details on our computer system. Beneficiaries on older policies, may not appear on this listing. If you have questions about any policy, please contact us on 1800 500 655.

Search

Start typing to filter by name

Client name	Title	Date of Birth	Gender	Address	Phone	Email
Aagaard, Ronny	Prof	11 Oct 1981	♂	2 WILLIAM ST HOBART TAS	0414497639	santosh.sharma@zurich.com.au
Abbo, Cleve	Prof	11 Jan 1987	♂	2 WILLIAM ST MELBOURNE VIC	0414497638	fake@hotmail.com
Abbott, Anthony	Mr	15 Apr 1976	♂	160 DANIELS Road MAGRA TAS	0466410623	
Abbott, Beverly	Mr	5 Oct 1970	♂	PO BOX 422 VICTOR HARBOR SA	0466410622	andrewprior2147@hotmail.com
Abbott, Devon	Mr	6 Nov 1988	♂	18 FAIRFAX ROAD WOOLLAMIA NSW		

B

**Client: Mr Beverly Abbott** ☆

Now you can generate stand alone projections for your client

I want to ...

Client Details		Address	
Date of birth	5/10/1970	Gender	Male
Email	andrewprior2147@hotmail.com	Mobile Country Code	Australia (+61)
Phone		Mobile	0466410622
Zurich LiveWell Member	No	Mailing Preference	<input type="radio"/> Post <input checked="" type="radio"/> Email

Policy	Role	Product	Superannuation	Status
76116124	LIFE INSURED, POLICY OWNER, PAYOR	Income Cover (Series 1)	No	IN FORCE

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

D

C

Self Service

I want to

Please select an option

- Change Client Details
- Create / view policy alteration quote or projection
- Create service request
- Edit primary address
- Export client details as PDF
- Provide third party authority

- A Get a list of every client within the “My Clients” tab
- B View the client's contact information, including address, email, phone & preferred mailing preference
- C Update the clients contact information (Phone, email, address etc) using the “I want to” option
- D View a list of policies linked to this client, including their role (Life Insured, Policy Owner, Payor, Beneficiary)
- E Status column allows you to quickly identifying which policies are inforce or lapsed

**Policy Number 76116124** Now you can generate a Policy Alteration Quote I want to ...

**A**

Commencement date	15/12/2014	Product	Income Cover (Series 1)
Status	IN FORCE	Superannuation	No
Agent number	9999	Related superannuation policy	
LIF Flag	No	Related non-superannuation policy	
Reference No.	000093182764		Certificate of Currency <b>D</b>
Policy eligible for Livewell	No		
Livewell Legacy Anniversary Tier			

**B**

Client role | Payor/Payment details | Policy & benefit details | Accounting history | Policy correspondence | Beneficiary details | More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURE					

**E**

Premium \$97.18 | Payment Frequency Monthly | Paid to Date 17/02/2025

Commencement Date 01/12/2005

Life Insured Name	Date of Birth	Sex	Smoker Status	Indexation
KRISTIE ABBOTT	10/10/1980 (ANB 45)	Male	Smoker	Yes
Death Cover	Cover Amount	Premium		
	\$290,304	\$85.71		

Death Cover | Cover Amount \$290,304 | Premium \$85.71

Cover Commencement Date 01/12/2005 (ANB 26) | Original Cover Amount \$110,000

Cover Cessation Date 01/12/2079 (ANB 100) | Premium Structure Variable Age-Stepped

Premium Waiver  | Business Future Cover option

**C**

Self Service

I want to: Please select an option

- Cancel cover within policy
- Cancel the policy
- Create / view policy alteration quote or projection
- Edit payment details
- Export policy details as PDF
- Notify claim
- Other
- Provide Third Party Authority
- Request to decrease cover
- Update beneficiaries

- A** View a quick policy summary including commencement date
- B** Use the various tabs running across the middle of the screen to view policy information
- C** Use the “I want to” button to submit requests such as updating payment details & downloading a policy PDF
- D** Download a certificate of currency
- E** View loading and exclusion information, premium type & additional options



# My Clients

## Cancel a policy

Policy Number 76129636 Now you can generate a Policy New Feature **I want to ...**

Commencement date	27/03/2012	Product	Life Insurance (Series 1)
Status	IN FORCE	Superannuation	No
Agent number	9999	Related superannuation policy	
LIF Flag	No	Related non-superannuation policy	
Reference No.	00009467034		<a href="#">Certificate of Currency</a>
Policy eligible for Livewell	No		
Livewell Legacy Anniversary Tier			

Client role: Payor/Payment details | Policy & benefit details | Accounting history | Policy correspondence | More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURED, POLICY OWNER, PAYOR	Alice Abbott	22/08/1970			fischerlouis8515@example.org
BENEFICIARY	Kristina Abbott	11/02/1971		0466410622	andraunovic254@gmail.com

- A** Cancel a policy using the “I want to” option
- B** From the list, select Cancel the policy
- C** Review T&C’s and submit the request to cancel
- D** Track the request via Service Request tab once the request has been submitted

Self Service

I want to:

- Cancel cover within policy
- B** Cancel the policy
- Create / view policy alteration quote or projection
- Edit payment details
- Export policy details as PDF
- Notify claim
- Other
- Provide Third Party Authority
- Request to decrease cover

**Cancel a policy**

Cancelling a policy will remove all its covers. To modify cover(s) **within** a policy, use the [policy alteration](#) page.

**Should Zurich require a copy in the future, please retain a copy of your clients' consent to cancel their policy. See the [Adviser guide](#) for more information.**

We will send an SMS to your clients once you submit this cancellation request (if we have a mobile number on record).

**Main policy - 76115665 - Income Cover (Series 1)**

Policy owner	Life insured	Life insured's date of birth
Alice Abbott	Alice Abbott	18/10/1979

Help us improve our services and offerings by answering the following:

**C**

**D** **Your cancellation request is in progress**

You and your client/s will receive correspondence **within 5 business days** confirming that your request has been completed.

You can check the progress in [Service Request](#) with reference number **SF5012123**. Refund and reinstatement information can be found in [The Adviser Guide](#).



# My Clients

## Update payment details



Policy Number 03351779 Now you can generate a Policy Alteration Quote I want to ...

Commencement date	01/12/2005	Product	Zurich Wealth Protection - Zurich Protection Plus
Status	IN FORCE	Superannuation	No
Agent number	LT93	Series	1
LIF Flag	No	<a href="#">Certificate of Currency</a>	
Policy eligible for Livewell	Yes		
Livewell Legacy Anniversary Tier			

Client role | **Payor/Payment details** | Policy & benefit details | Accounting history | Policy correspondence | Beneficiary details | More

Payor name	Kristie Abbott	Method of Payment	Credit Card
Payor address	52 Hunter Street, Rutherglen, VIC, 3685	Cardholder name	Mr & Mrs P Woodford
Billing frequency	Monthly	Card number	6646XXXXXXXX4849
Total premium*	\$97.18	Card type	Visa
Paid to date	17/02/2025	Expiry date	11/15

Edit payment

Self Service

I want to: Please select an option

- Cancel cover within policy
- Cancel the policy
- Create / view policy alteration quote or projection
- Edit payment details**
- Export policy details as PDF
- Notify claim
- Other
- Provide Third Party Authority
- Request to decrease cover
- Update beneficiaries

**Edit Payment Details for Policy 03351779**

**Mr & Mrs P Woodford**  
6646XXXXXXXX4849  
Credit Card  
Charged Monthly

**Warning**  
The next premium payment is due in the next 3 business days. The updated payment details may not be applied before this payment is drawn. To ensure the details are updated prior to the premium being drawn, please call 131 551.

[Change Payment Details](#)

[Change Payment Frequency](#)

[Cancel](#) [Save](#)

**Payment Method**

Please select the new Payment Method from the choices below.

**Bank Account**

**Credit Card**

[Back](#) [Next](#)

**Payment Details Credit Card**

Please provide Credit Card details below.

Name: \_\_\_\_\_

Card number: \_\_\_\_\_

CVV: \_\_\_\_\_ Expiry date: MM / YY

How frequently should the payment method be charged for this policy?  
Monthly

[Back](#) [Save](#)

Changing the Payment Frequency will alter the Policy's Premium.

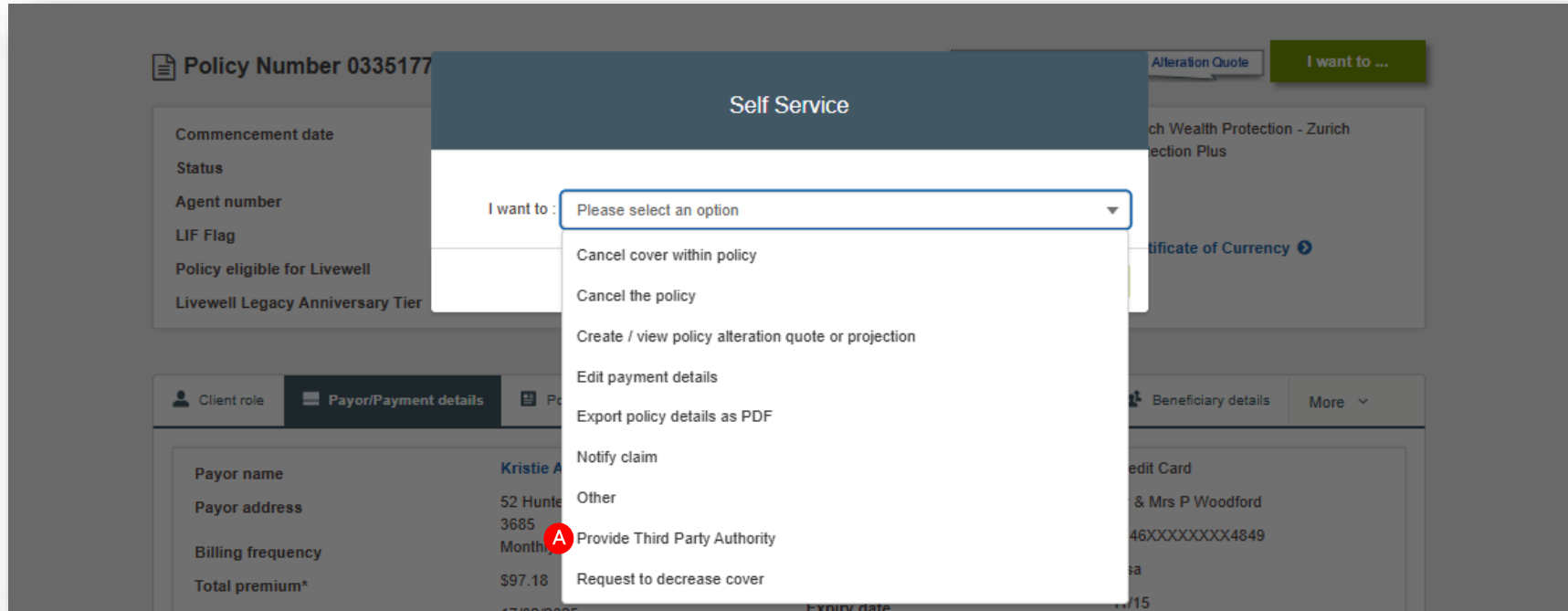
- A** Update payment details via "I want to" or the payor/payment details tab
- B** Select between Direct Debit, Credit Card or Rollover as preferred payment methods
- C** Once the request is submitted, track it until completion via the Service Requests tab by selecting "more"
- D** Change payment frequency from the same screen

\*Electronically accepted. No signature required



# My Clients

## Third Party Authority



- A** Submit Third-Party authorities on behalf of your clients
- B** Nominate one or multiple policies for the authority to be applied to
- C** Select between adding a spouse/family member, or alternatively, another adviser from the same office
- D** Choose whether the authority is ongoing, or for a nominated period

**\*Straight through processing, the authority will be active immediately**

**Permit Third Party Access**

Do you want to permit a Third Party access to policies under **Christina Abbott's** account?

**Third Party**  
Able to access policies under Christina Abbott's account

**Christina Abbott**  
Policy holder

You can either permit access to all policies associated with Christina Abbott's account, or select specific policies.

**Type of Third Party**

Please indicate the kind of Third Party Authority you intend to add to Christina Abbott's policies.

Is the Third Party a...

**Spouse / Family member**

Financial Adviser

Should you wish to provide a relationship that is not listed, please contact our Adviser Service team on 1800 500 655 or via email at adviser.service@zurich.com.au

**Select policies to permit access to**

Which of **Christina Abbott's** policies would you like to add a Third Party Authority to? You can either permit access to all associated policies, or select specific ones.

**Christina Abbott**  
Policy holder

Which of Christina Abbott's policies would you like to add a Third Party Authority to?

All associated policies

OneCare - 77879254

OneCare Super - 77879255

**Details of Third Party Authority**

Please provide details for the Third Party.

**Spouse / Family member**

Details of Spouse / Family member

Name \*

Date of Birth - DD/MM/YYYY \*

Phone \*

Email

Address \*

**Duration of Authority**

Select the date and time from which the Third Party Authority will be added.

Current time and date

Date

Time

Would you like to add an expiry date? If you do not add a date, this authority will be valid until Alice Abbott revokes it.

Ongoing basis

Date

Time



# My Clients

## Reinstate & Make a Payment

**Policy Number 77578318** New Feature I want to ...

Commencement date	24/03/2020	Product	OneCare
Status	LAPSE	Superannuation	Yes
Agent number	7NMQ		
LIF Flag	Yes		
Reference No.	001007160002		

**Policy has Lapsed** Reinstate now **A**

The policy can be reinstated without underwriting if payment of \$875.00 is made by the 25/10/2022.

**Client role** Payor/Payment details Policy & benefit details Accounting history Policy correspondence Beneficiary details More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURED, PAYOR	Katelyn Walker	18/12/1997			paul@techforceservices.com.au

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

**Reinstate Policy** ✕

**Policy 77578318**

You can find details of the lapsed Policy below, and start the Reinstatement Process.

Arrears	\$875.00
Lapsed date	18/09/2022
Reinstate by	25/10/2022

i The reinstatement must be submitted by the "Reinstate by" date.

We don't require your client's signature or related documents to be provided to us to action this request.

**B** Start Reinstatement Process >

**Policy Number 77472671** Now you can generate a P... Report an issue I want to ...

Commencement date	03/11/2015	Product	OneCare Super
Status	IN FORCE	Superannuation	Yes
Agent number	7XDB		Certificate of Currency
LIF Flag	No		
Reference No.	001005441339		

Loyalty program name: Qantas Frequent Flyer		
Member name	Member number	Date joined
Not provided	Not provided	Not provided

**Approaching Cancellation Advice** Make a Payment **A**

This policy is approaching cancellation. To avoid cancellation, the payment of \$342.30 will need to be made before 26/09/2022.

**Client role** Payor/Payment details Policy & benefit details Accounting history Policy correspondence Beneficiary details More

Client role	Name	DOB	Phone	Mobile	Email
LIFE INSURED, PAYOR	Cassandra Casey	27/08/1974			debra79@example.org
BENEFICIARY	Sherry Casey	03/02/1977			debra79@example.org
BENEFICIARY	Omar Casey	21/04/2008			
BENEFICIARY	Scott Casey	10/11/2007			

**Make a Payment** ✕

**Policy 03420069**

You can make a One-off Payment to pay off the total Premiums due on this Policy.

Premiums due	\$1469.35
Due date	23/09/2025
Lapse date	18/10/2025

i Payment of Premiums due must be paid by the lapse date.

We don't require your client's signature or related documents to be provided to us to action this request.

**B** Make a Payment >

**A** Make one-off payments when policy is approaching cancellation, renewal or when reinstating

**B** Select "Make a Payment" or "Start Reinstatement Process"

\*Once selected, options will appear to enter in payment details to clear outstanding amounts.

An internal task will be created for the payment to be processed

# Portfolio Insights

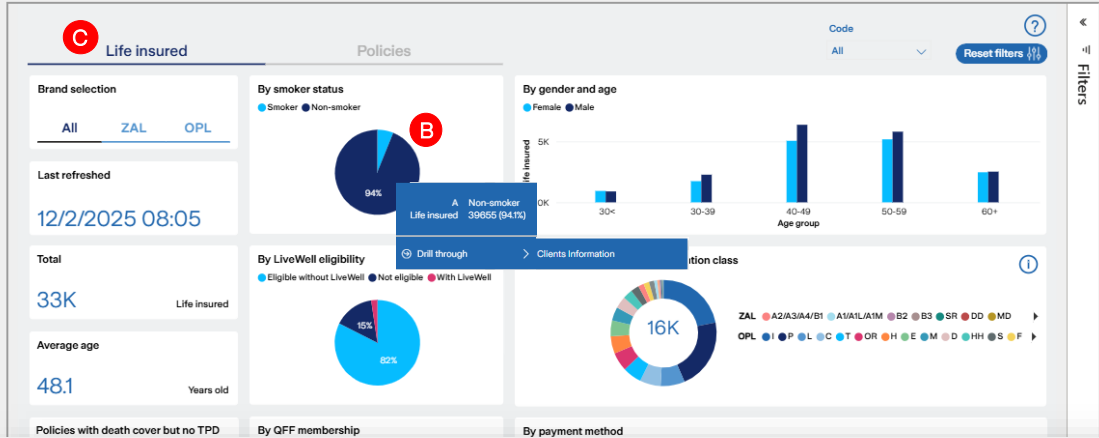


# Portfolio Insights

Birdseye view of your book across Zurich & OnePath

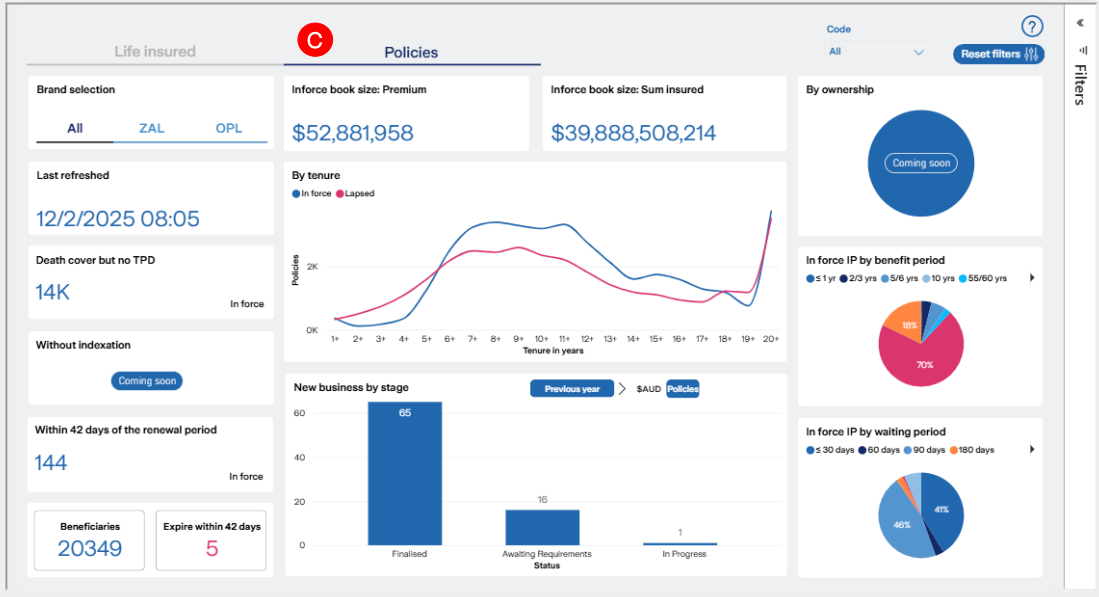
A

## Your portfolio insights



A

## Your portfolio insights



B

## Your portfolio insights

Insights > Client information

Client number	Gender	Age	Smoker status	Policy number	Brand	GFF status	LiveWell status	Product	Occ Class	Payment method
4414520	Female	58	Non-smoker	03193212	ZAL	Without	Eligible without L.	Disability,Trauma		Direct debit
4419361	Male	61	Non-smoker	03198685	ZAL	Without	Eligible without L.	Disability,Term,Trauma		Direct debit
4426505	Female	47	Non-smoker	03206432	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4438867	Male	55	Non-smoker	03221518	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4447955	Female	56	Non-smoker	03233074	ZAL	Without	Eligible without L.	Disability,TPD,Term		Direct debit
4450182	Male	55	Non-smoker	03235837	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4454290	Male	52	Non-smoker	03242095	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4454561	Female	64	Non-smoker	03242277	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4463457	Male	68	Non-smoker	03254569	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4463461	Female	68	Non-smoker	03254574	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4463640	Male	49	Non-smoker	03255030	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4470319	Male	55	Non-smoker	03264403	ZAL	Without	Eligible without L.	Disability		Direct debit
4470749	Female	47	Non-smoker	03264936	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4470935	Female	49	Non-smoker	03265184	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4450907	Male	57	Non-smoker	03267396	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4516920	Female	59	Non-smoker	03268157	ZAL	Without	Eligible without L.	Disability,Term		Direct debit
4475338	Female	62	Non-smoker	03271519	ZAL	Without	Eligible without L.	Disability,Term		Direct debit

A

View a breakdown of your book across Zurich & OnePath

B

Hover over each chart to “Drill through” to see the list of clients under each respective bits of data, including client name, contact information and policy #

C

Options of two tabs (Life insured & Policies), with more to come in future iterations

# Renewals

**A** **Renewal tracking**

All **C** **B** Export

To view specific renewal tracking notice types 'click above'

Notice type	Policy number	Life insured	Product name	Issue date	Lapse date	Details
Approaching cancellation advice	76124579	Autumn Bush	Life Insurance (Series 1)	14/7/2024	17/8/2024	
Approaching cancellation advice	03579136	Timothy Chung	Zurich Wealth Protection - Zurich Protection Plus	16/7/2024	19/8/2024	
Approaching cancellation advice	91227544	Cody Goodman	Zurich Wealth Protection - Zurich Protection Plus	17/7/2024	17/8/2024	
Approaching cancellation advice	03384717	Marissa Olsen	Special Risk Income Replacement - Special Risk Income Replacemnt	18/7/2024	21/8/2024	
Approaching cancellation advice	03579135	Danny Chung	Zurich Wealth Protection - Zurich Protection Plus	18/7/2024	21/8/2024	
Approaching cancellation advice	76124141	Dennis Shah	Life Insurance (Series 1)	18/7/2024	21/8/2024	
Approaching cancellation advice	03512737	Martin Foster	Zurich Wealth Protection - Zurich Protection Plus	21/7/2024	24/8/2024	
Approaching cancellation advice	76086072	Vicki Vaughn	Income Protection (Series 1)	21/7/2024	24/8/2024	
Approaching cancellation advice	76130354	Ricky Marsh	Life Insurance (Series 1)	21/7/2024	23/8/2024	
Approaching cancellation advice	76129880	Wayne Wagner	Life Insurance (Series 1)	23/7/2024	26/8/2024	<b>D</b>

Notice type	Policy number	Life insured	Product name	Issue date	Lapse date	Details
Approaching cancellation advice	76124579	Autumn Bush	Life Insurance (Series 1)	14/7/2024	17/8/2024	

Policy Owner	<b>Bob Bush</b>		
Amount due	\$521.95	Due date	24/7/2024
Commencement date	24/12/2012	Total due	\$1,043.90
Overdue amount	\$521.95	Premium frequency	Monthly

- A** View important renewal details in the Renewals tab
- B** Export the list to excel or CSV
- C** Search through the various notice types using the drop-down filter option
- D** View notice types in greater detail by expanding each line after selecting the details icon

# Claims

**A** **Claims**

Filter by Status: All Claims

Search by Life insured / Policy owner / Policy No.

**B** **I want to ...**

Claim No. ⌵	Policy No. ⌵	Claim type ⌵	Life insured ⌵	Policy owner ⌵	Date lodged ⌵	Date finalised ⌵	Status ⌵
<b>C</b> C-2024-305008	03384717	Income Protection	Marissa Olsen	Marissa Olsen			Notified
C-2024-305924	03507227	Total and Permanent Disability	Mallory Pacheco	Mallory Pacheco			Notified
C-2024-305813	03507226	Death	Mallory Pacheco	Thornton			Notified
C-2024-306858	76136857	Income Protection	Jack Santos	Jack Santos			Notified
C-2024-300973	91046489	Income Protection	Hector Huang	Hector Huang			Notified
C-2023-300498	83005315	Trauma	Ernest Ruiz	Ernest Ruiz			Notified
C-2024-306168	76084844	Income Protection	Donna Mathis	Donna Mathis			Notified
C-2024-307646	90423225	Total and Permanent Disability	Daisy Duck	Brighter Super Trustee			Notified
C-2024-307436	90423225	Total and Permanent Disability	CaseTwentyFive	Brighter Super Trustee			Notified
C-2024-306824	76170887	Income Protection	Caleb Bolton	Caleb Bolton			Notified

**D** **Claim Number C-2024-305008**

Claim status	Notified	Date of event	06/12/2011
Policy number	03384717	Date notified	27/05/2024
Claim type	Income Protection	Date lodged	
Life insured		Date finalised	
Policy owner			

**D** Claim contact details [131 551](tel:131551) [life.claims@zurich.com.au](mailto:life.claims@zurich.com.au)

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

**E** **Claim Notification**

**Claim Details**

Policy number	91022479	Product	Zurich Protection Plus
Adviser		Policy owner	Brighter Super Trustee
Life insured *	Select an Option	Claim type *	Select an Option
Date of event	<input type="text"/>		
Reason for claim *	<input type="text"/>		
Send forms to *	Select an Option		

Customers' information must be protected in accordance with privacy obligations. You must ensure that you properly verify the identity of any person before giving them access to any customer information. While reasonable efforts have been made to ensure the accuracy of the information provided on the Adviser Portal, we do not give any guarantee, representation or warranty as to the reliability, accuracy or completeness of the information, or accept any responsibility or liability arising in any way relating to errors in, or omissions from such information. You should refer to the relevant policy documents including the policy terms & conditions which prevail over the information presented on the Adviser Portal.

- A** View a list of all Zurich & OnePath claims.
- B** Notify us of a claim using the “I want to” option
- C** Select the claim number to view more information on that specific claim (Date submitted, payments etc)
- D** View the contact details for the claims assessor in the event you need to contact them
- E** After choosing to notify of a claim, simply provide as much information on the claim as possible, before nominating who the documents should be sent to.

# Service Requests

**A** Service requests **C** + New service request

Open service requests 28

Ref. ↕	Subject ↕	Raised By ↕	Created ↕
SF4056156	37827432 - Increase quote - Smith, Jason	Adviser	10/02/2025
SF4054701	Test	Adviser	21/01/2025
SF4054595	Character limit test	Adviser	15/01/2025
SF4054594	Test	Adviser	15/01/2025
SF4026225	CPI Decline request for Edgar Mahoney	Adviser	20/11/2024
SF4017417	Rollover Request for policies 03579942	Adviser	05/11/2024
SF4017416	Policy Alteration for policy 91024030	Adviser	05/11/2024
SF4016559	Direct Debit Request for policies 90424366	Adviser	31/10/2024
<b>B</b> SF4016558	Policy Alteration for policy 90013975	Adviser	31/10/2024

Your comment attachment was uploaded successfully

**B** Manual quote request for policy 75010113 Open

Ref SF5011252  
Status Open  
Policies 75010113  
Lives insured Ian Morris  
Requested by Adviser  
Origin ZLife  
Date opened 01/10/2025

Test

Activity Feed +Add attachment or comment

- Adviser added a new comment  
Test comment  
9/10/2025 1:40 PM
- Adviser created a new service request  
01/10/2025 02:32 PM

**C** New service request

Subject \*  
50 characters left Typed characters only

Comments \*

Attachments  
Upload Files Or drop files

Zurich doesn't support this file type or more than allowed files are being attached.  
Documents with '.pdf', '.png', '.jpg', '.jpeg', '.gif', '.tif', '.tiff', '.bmp' format can be attached. Maximum of 10 documents can be attached at a time.

Submit

- A** Track open and closed Service Request
- B** Selecting the reference number hyperlink allows you to see any comments or updates from those managing the request
- C** Submit new Service Request

\*Once closed, Service Requests appear in the system for two years, helping to keep a trail of what's been requested.

# Tools & Resources

ZURICH OnePath

Home Quotes Applications My clients Renewals Claims Service Requests Insights Tools & Resources

**New Policy Quotes**

Reference number	Life insured	Date of birth	Date last updated	
<a href="#">I192648635</a>	John Smith	6/11/1987	31/1/2025	
<a href="#">I059131587</a>	Andrew Prior	6/1/1987	31/1/2025	Quote
<a href="#">I897945757</a>	Fake Name	6/11/1987	31/1/2025	Quote
<a href="#">I462685557</a>	Fake Fake	1/8/1989	31/1/2025	Quote
<a href="#">Q002885956</a>	Donna Test	1/1/1990	21/1/2025	Unsubmitted application

[View more quotes >](#)

**Applications**

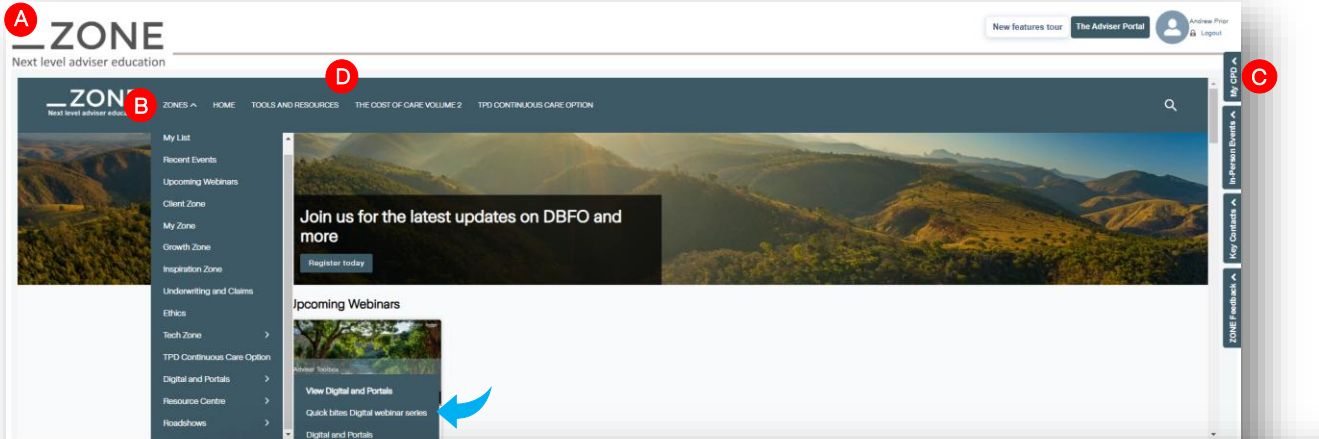
Life insured	Date received	Status
<a href="#">uipath I000502732</a>	13/02/2025	In Progress
<a href="#">uipathillus C0940002201</a>	13/02/2025	In Progress
<a href="#">Jonathon Rollovertesttenoone</a>	12/02/2025	In Progress
<a href="#">Benefit Teleintprocess</a>	12/02/2025	Awaiting Requirements
<a href="#">uipath I000502725</a>	12/02/2025	In Progress

[View more applications >](#)

**Claims**

- \_Zone
- Zurich Adviser Guide
- OneCare Adviser Guide
- PDS & Forms
- Data feed access
- Reports
- FAQs

- [Access \\_Zone, Zurich's adviser education platform](#)
- [Launch Zurich & OnePath's Digital Adviser Guide](#)
- [View various PDS & Forms for both Zurich & OnePath](#)
- [Set up Data feed access to your client management systems](#)
- [Generate various reports on your book of clients](#)
- [View FAQ's](#)



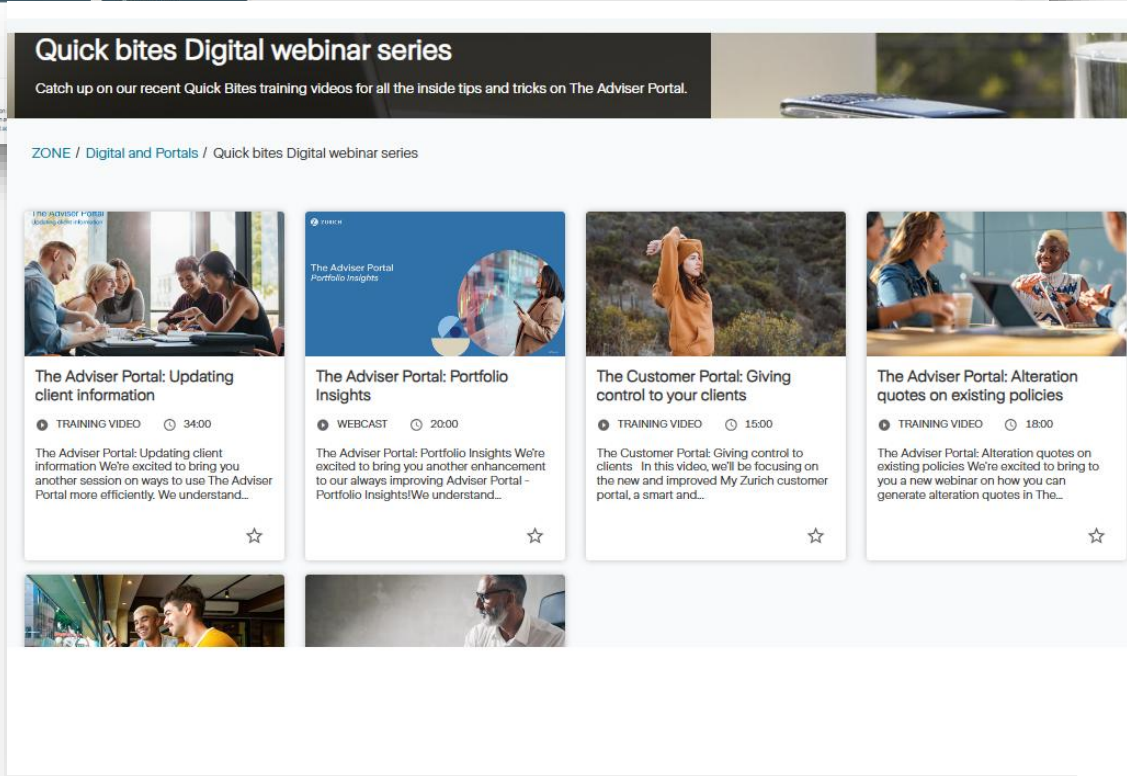
**A** View On-Demand content using Zurich’s \_Zone Education platform

**B** Access various topics under the “Zones” tab, including Client Zone, Growth Zone, Digital & Portals and more

**C** Obtain CPD points on eligible sessions and view them in the “My CPD” tab

**D** Access White Label marketing material, Insurable Income calculator & Cost of Care tool

\*Single sign on. Your portal password works for \_Zone



**A**

ZURICH OnePath Home Quotes Applications My clients Renewals Claims Service Requests **Tools & Resources** Search

### Data Feed Services - New Registration

You have requested access to the data feed web service.

**Please read the following information before taking any further action**

**Before proceeding, please ensure that you review the items included in the checklist below.**

1. Please arrange for a full back up of all of your existing client and policy data held in your financial planning software (FPS) system if you haven't already done so.
2. At the conclusion of this data feed registration process, you will be provided with a new system generated data feed username and a password. You must enter this new username and password directly into your financial planning software (FPS) to enable automatic data feeds to commence. An email confirming the successful registration request will be sent to your nominated email address.
3. Your data feed password will expire every 365 days. 14 days prior to this expiry date, you will be sent a reminder email requesting that you log into the Adviser Portal, select the 'Data feed' option and change your password. This new password must then be entered into your financial planning software (FPS) otherwise your data feed service will cease operating.
4. If you're now ready to proceed with your data feed registration, please complete the form below

Web User ID: **uat021**

What date would you like the data feed service to commence?  
04/11/2021

What date would you like the data feed service to end?  
04/11/2121

Financial Planning Software (FPS) provider  
[Dropdown menu]

Cancel Submit

**B**

ZURICH OnePath Home Quotes Applications My clients Renewals Claims Service Requests **Tools & Resources** Search

### Data Feed Services - New Registration

## Thank you

Your new data feed registration has been successfully completed and an email confirming this has been sent to you

**Your data feed details are:**

Start date: 04/11/2021  
End date: 04/11/2121

**Financial Planning software provider (FPS): XPLAN**

You must now add the following data feed username and password in to your financial planning software to ensure the data feed services with your software provider can successfully commence.

**Data Feed Username:** XPLN14096  
**Data Feed Password:** GXCUIj6jh

\*Please store your data feed username and password securely as we are unable to send you this information via our email service.

**C**

### My Data Feed details

You have already registered for this service

Listed below are the types of changes that you can make to your existing data feed service. An email confirming your changes will be forwarded to you once it has been successfully processed.

- Reset my data feed password
- Change my data feed financial planning software (FPS) provider
- Change the end date of my data feed service
- Cancel my data feed service**


To cancel your data feed service, please select the 'Cancel my data feed access' button below


Cancel my data feed access

- A** Set up Data feeds by selecting "Tools & Resources"
- B** Once submitted, you will receive confirmation the feed has been set up successfully
- C** To cancel, simply go back to the data feed section and select cancel

\*Data feeds can be set up using XPLAN, Adviser Logic, Platform Plus & Adviser Intelligence.


Once you have set up in the portal, you will need to enter your Data feed username and password into your respective CRM

**A**  Reports




**Policy/ Coverage Report**


Extract your client's policy or detailed coverage details.




**Annual Fee Disclosure**




**Client Contact Details Report**




**Client Communication Preference Report**




**LiveWell Client Report**



**Overdue Payments Report**



**Adviser Remuneration Transaction Report**

**B**  Run policy / coverage report

You can choose to filter your report by selecting from the criteria below. The report will be downloaded as a CSV file.

Surname

Hold down the control (ctrl) key to select multiple options

Product Name

Payment Method

Payment Frequency

Commencement Date: (dd/mm/yyyy)

Range From

Range To

Fund Balance:

Range From

Range To

Date of Birth: (dd/mm/yyyy)

Range From

Range To

- A** Generate reports across your entire book of clients
- B** Policy/Coverage Report, Client Communication Report, Overdue Payment Report & more
- C** Adviser Remuneration Transaction report gives you a complete breakdown of commissions that have been paid to you

\*Download the reports into your preferred format

# Multi Factor Authentication

## MFA



# Multi Factor Authentication

Extra layer of security, protecting yours and your client's data

**A**

**B**

**C**

- A** Log on using your credentials
- B** After logging in, you will be prompted to enter a code which is sent to either your mobile or email.
- C** Update your preference between SMS/Email by going to preferences and selecting the “Security Preferences” tab.

Thank you