For Intermediary use only, not for use with clients.

Broker Portal

Your guide for quick and easy administration of your clients' policies up to 249 members

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Welcome to Aviva Broker Portal

Broker Portal is our online platform where you can make simple administration changes to your SME and Consumer clients' membership.

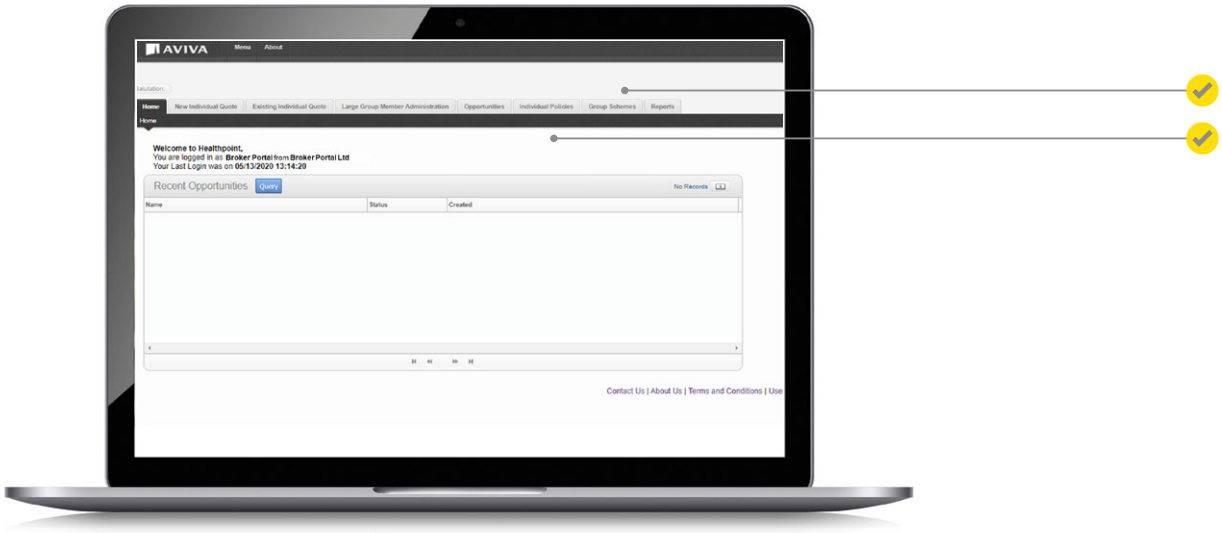
This guide will take you through how to get started, updating member information and much more. You can refer back to this guide as a first port of call should you have any queries in the future.

To register for Broker Portal, speak to one of our team who will get you set-up.

The benefits of using Broker Portal include:

- **It's time-saving**
  It only takes a few minutes to make a change so you can tackle more challenging jobs in your day.
- **It's instant**
  You can action any changes you need to make straight away. There's no need to pend your query and wait for us to make them.
- **It's convenient**
  Broker Portal is accessible day and night so you can carry out your tasks when it's convenient for you.
- **It's efficient**
  With multiple administration changes available, you can complete them all in one go.
- **It's evolved**
  We've listened to your feedback and it's been built with you in mind.

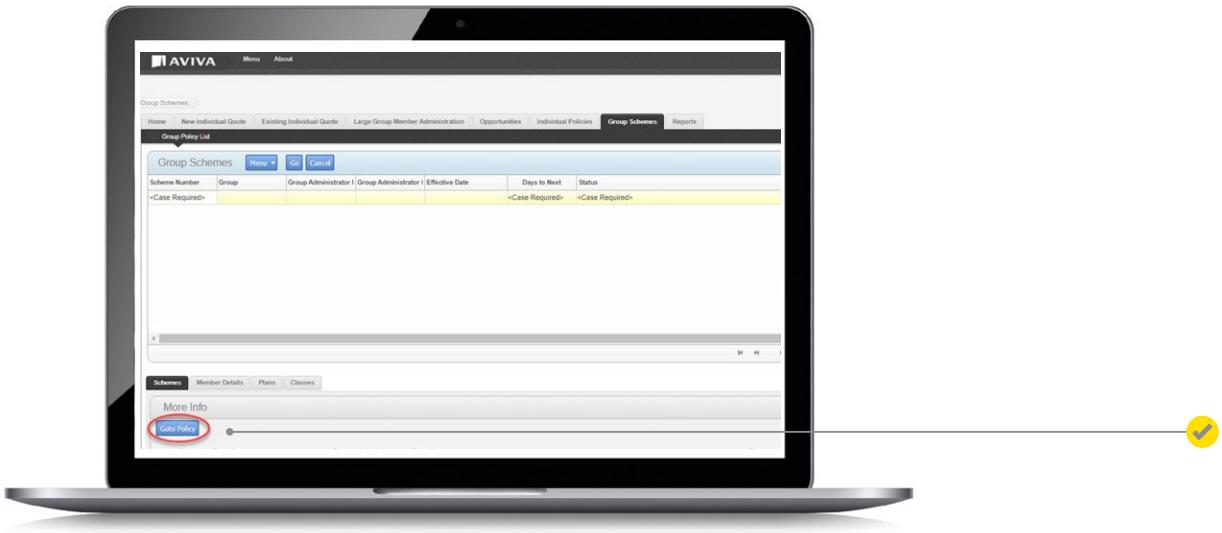
Getting Started



The Broker Portal is initially accessed through your standard Healthpoint home page:

healthpoint.aviva.co.uk/MyAccount/Login

1 Firstly, you need to select **Group Schemes** or **Individual Policies** by using the drop-down arrow at the top of the page.

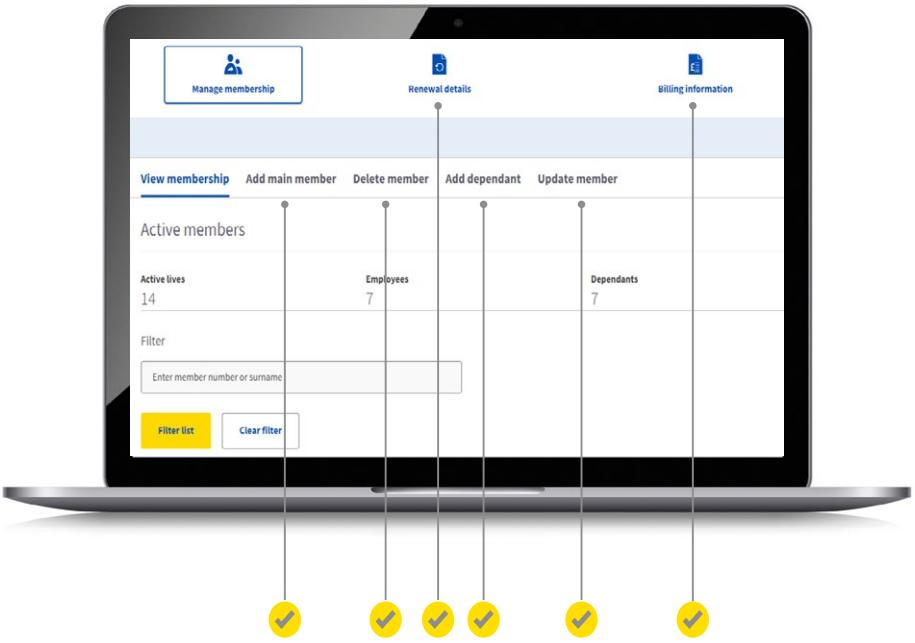


2 From this page you will be able to see the first 10 policies of your portfolio. If you are unable to see the policy you want to access, please use the drop-down function highlighted above then follow instructions shown in section.

Alternatively, if you can see a policy you want to administer, simply click on the line this is on and select **Go to Policy**.

The policy details will appear and then to administer this simply select **Go to Policy** which will take you to the policy home screen.

Broker Portal home page and Live Chat

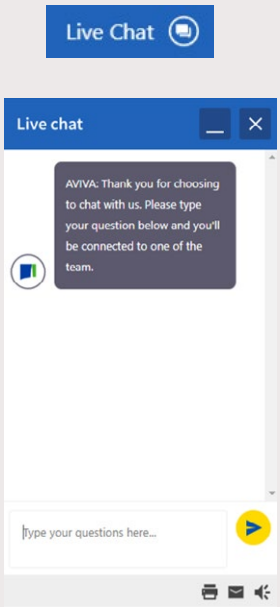


1 From the policy home page you can see some high level information regarding the policy in the policy snapshot.

You can access our dedicated Health Adviser Site by simply clicking the link on screen and you can speak to a member of the Trading Centre team by clicking on **Live Chat**.

The features available to use are:

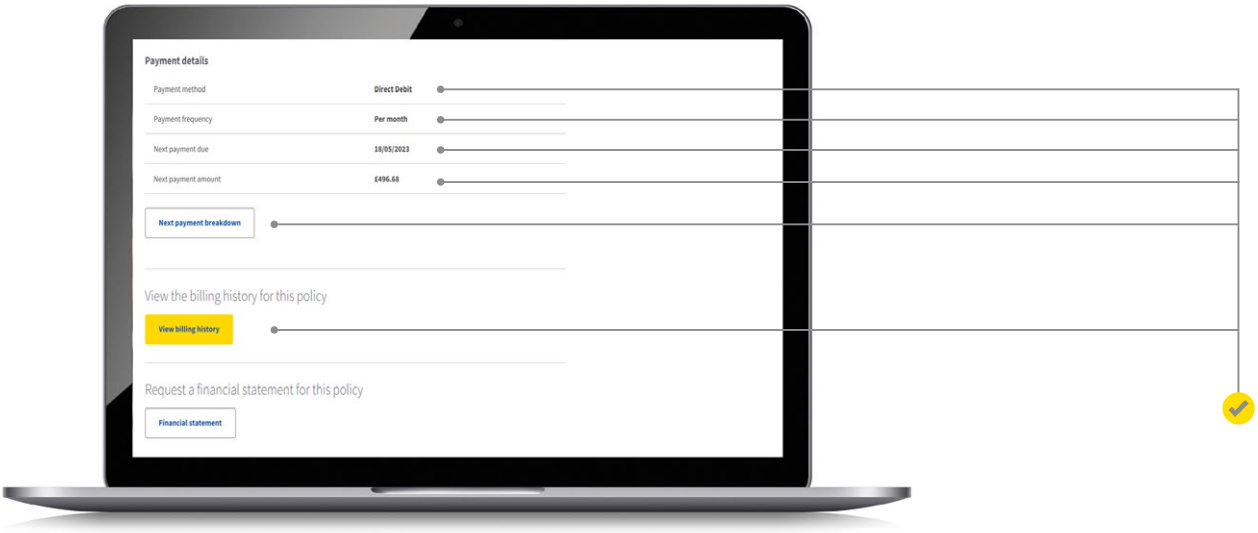
- Live Chat
- Add main member
- Add dependent
- Delete member
- Update member
- View a renewal summary and renewal quote
- Billing information and financial statement



2 The Live Chat button will appear on each page you move to, so is available for support on all journeys. It is managed by our Trading Centre consultants.

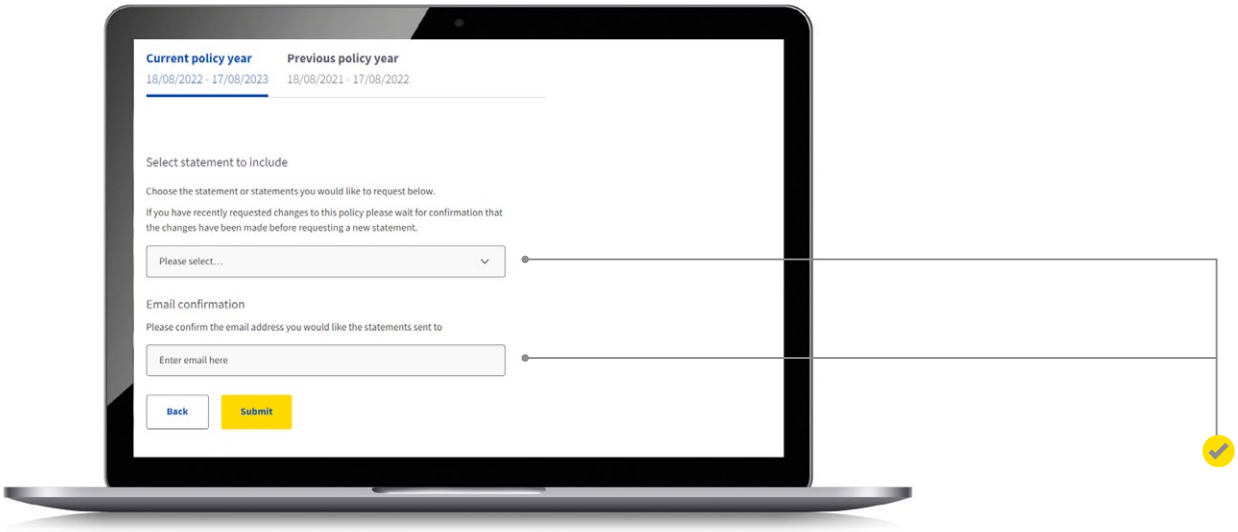
You will be prompted to type your message when the Live Chat button is clicked. A consultant will then join the chat to support you.

Request a financial statement (SME)



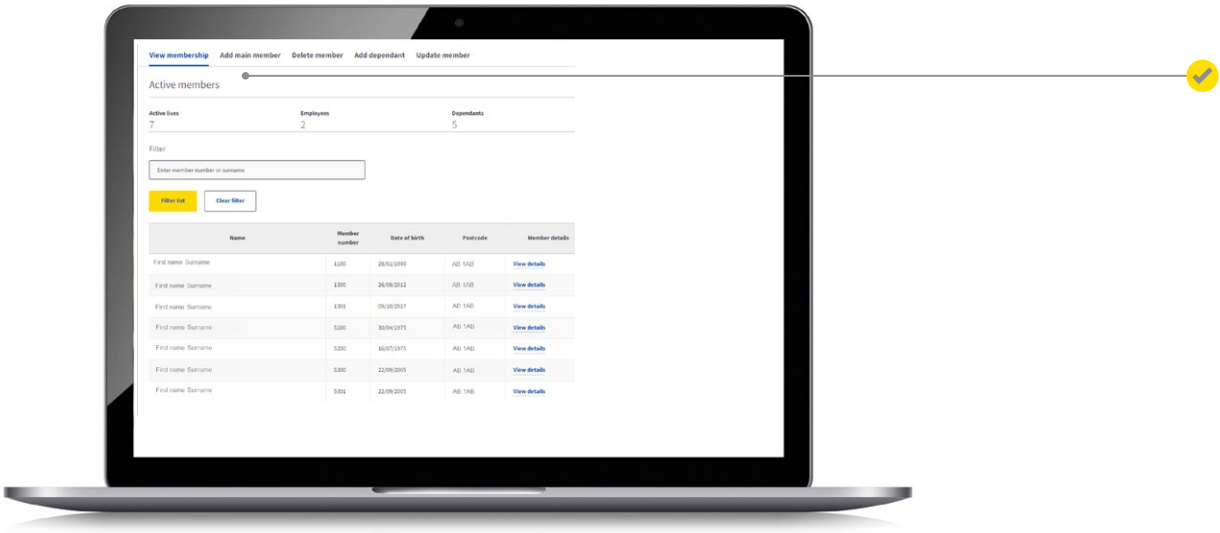
1 Within the Billing Information feature you will see a summary

- the payment method
- payment frequency
- the next payment due date
- the next payment amount
- breakdown of next payment

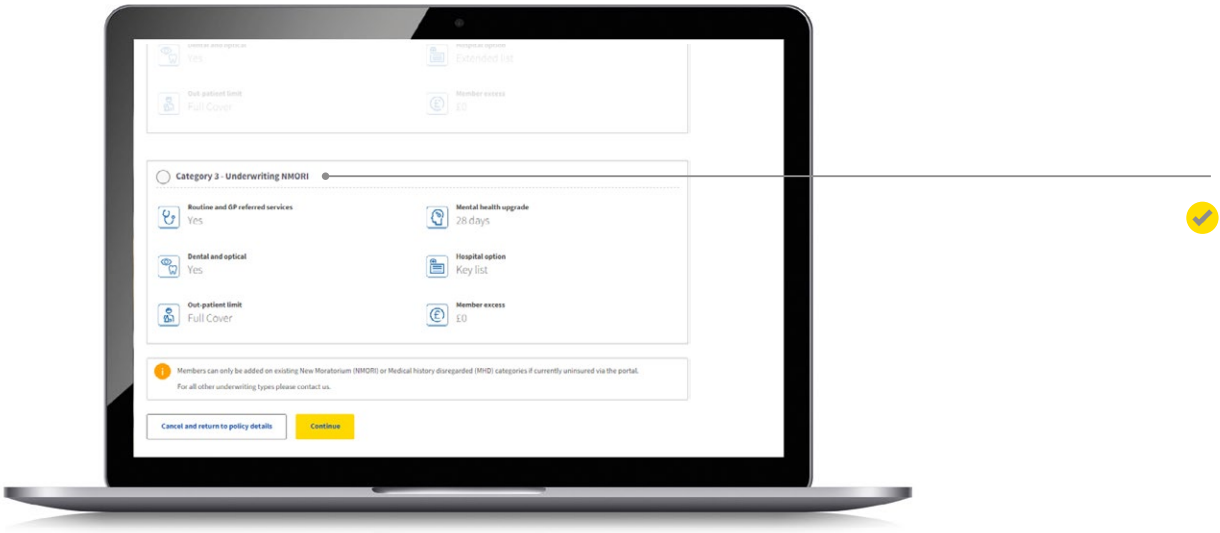


2 To request a financial statement click on financial statement, then select the relevant month. Enter your email address and click **Submit**.

Add main member (SME)



1 To add a main member firstly select **Add main member** at the top of the policy screen.



2 In this screen you will see all categories on a policy that have existing active members within them. You will only be able to select any NMORI categories and MHD where there is no other underwriting type and more than 15 main members on a virgin basis.

NMORI New moratorium underwriting

MHD Medical History Disregarded

3 Here you can input the members details by populating the boxes. At the bottom of the page you can add a partner and children.

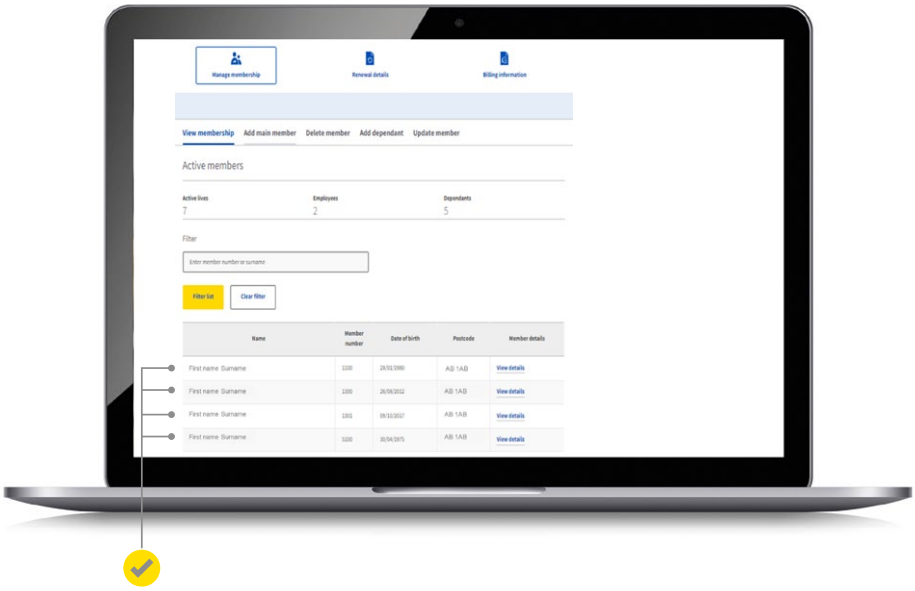
Once you have clicked to add a partner or child continue down the page and complete any partner and/or child details. You can also click to remove them if you have added them by mistake.

If you would like to add another child to the main member click **Add Child**. Once you have finished click **Continue** at the bottom of the page and you will be diverted to the basket at the top of the page.

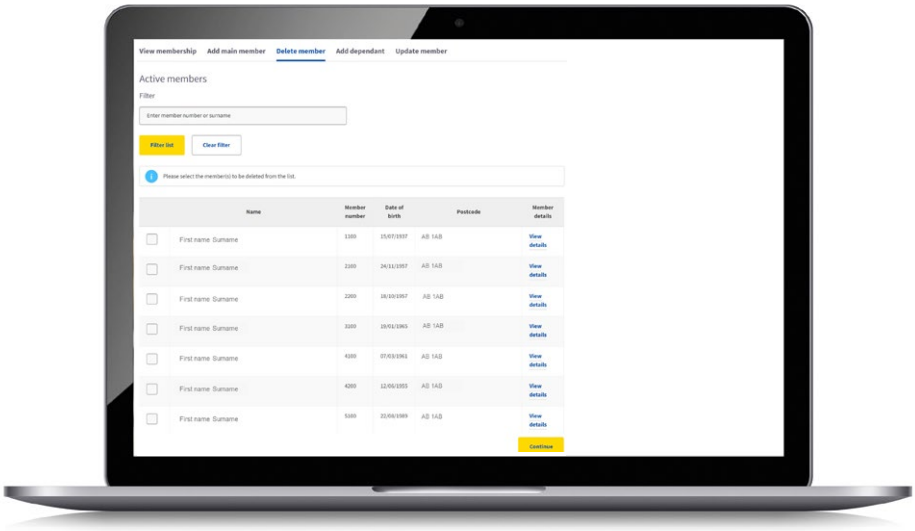
4 You can also make further changes by clicking **Make further changes** at the bottom of the page.

Once you have filled in your email address and are happy with the changes click **Submit**.

Delete member (SME)

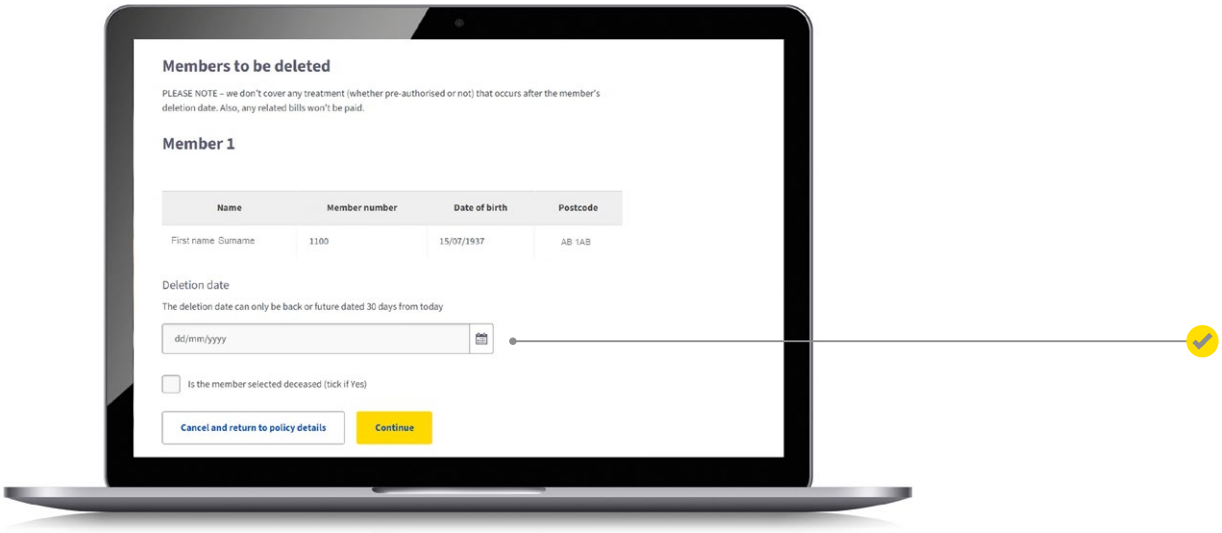


1 To delete a member from the policy, select **Delete member** at the top of the policy screen and then search for the main member or dependant you want to delete. Choose the main member by selecting the box next to their name and then press **Continue** to advance to the next screen. If you select a main member to delete all associated dependants will also be selected.



2 This next screen will give you details of what member(s) you want to delete. You will need to fill in the date you want the member to be deleted from the policy. If a member is deceased press the tick box to confirm. If you decide you don't want to carry out the deletion, select **Cancel and return to policy details** to return to the policy home page.

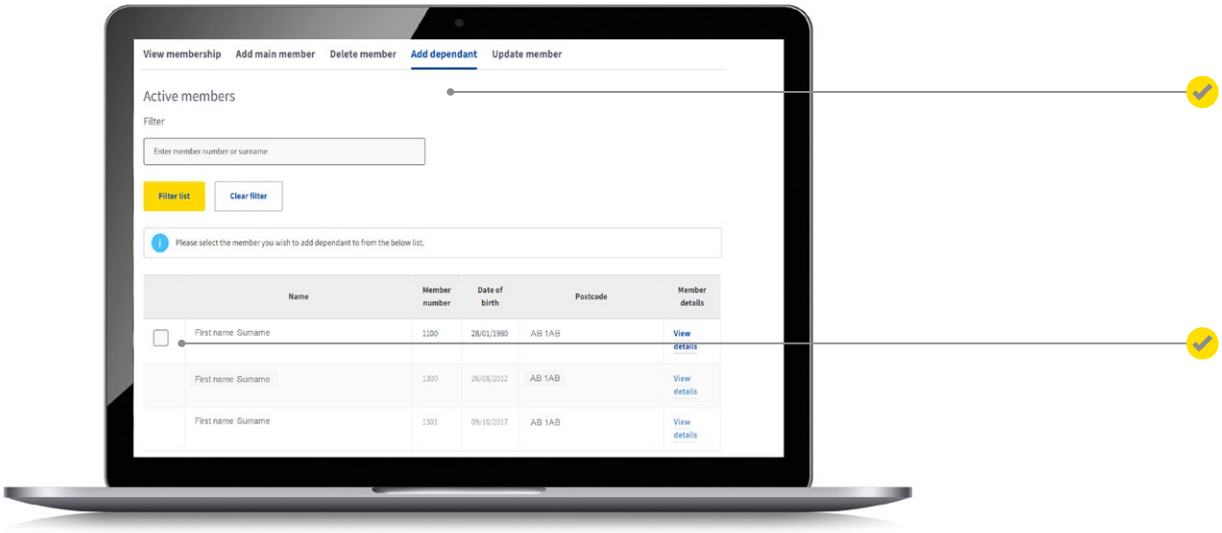
Once all information has been confirmed press **Continue** to proceed to the next screen.



3 This screen will confirm the details of the changes you are about to make. All you have to do is provide your email address to receive confirmation of your changes made. If you change your mind, you can select **Undo** next to the change to cancel this.

If you want to make any further amendments before submitting the changes on this screen press **Make further changes** to return to the policy home page to start another change journey. Once you have filled in your email address and when you are happy with these changes simply click **Submit** to save the changes.

Add dependant (SME)



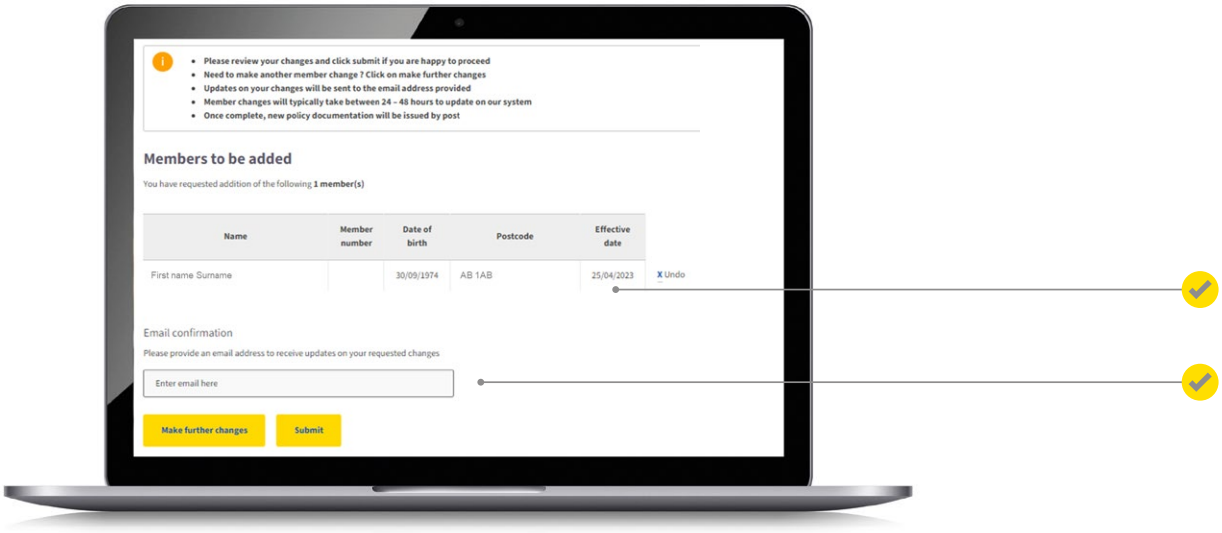
1 To add a dependant to a main member select **Add dependant** at the top of the policy screen and then search for the main member you want to make the addition to. Simply choose the main member by selecting the box next to their name and then press **Continue** to advance to the next screen.

Note: You can only add dependants on New Moratorium underwriting.

2 From this screen all you have to do is fill in the dependants details. In addition to this you can choose what date you want the dependant to be added.
If you want to add an additional dependant press the **Add another dependant** option and repeat the process until all required details are added.

When this is completed, click **Continue** to advance to the next screen.

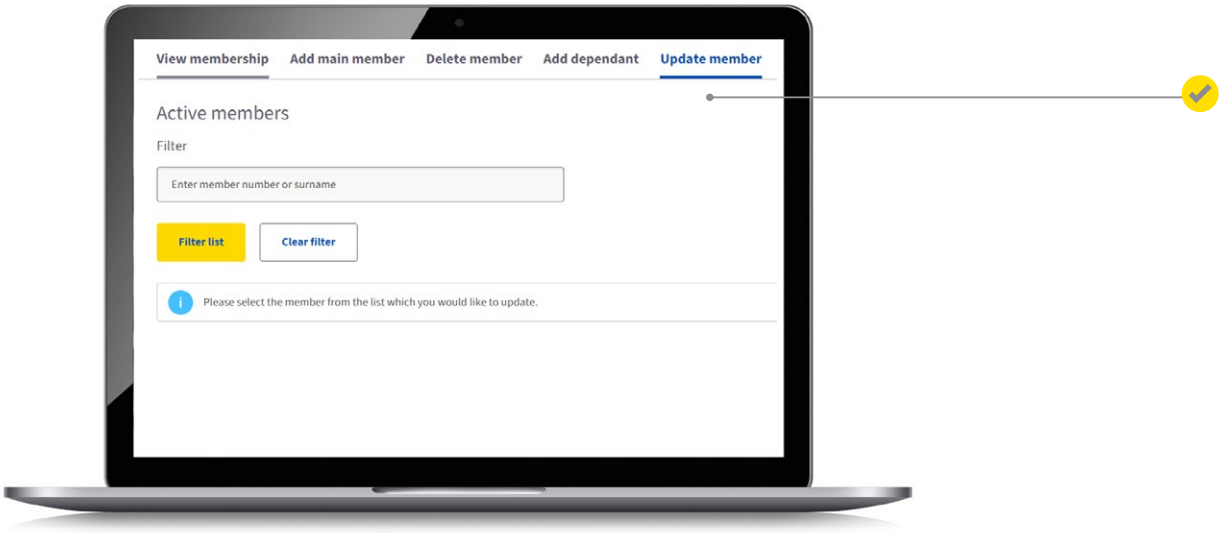
Alternatively, if you don't want to make the additions, press **Cancel and return to policy details** to return to the policy home page.



3 This screen will confirm the details of the changes you are about to make. All you have to do is provide your email address to receive confirmation of your changes. If you decide you do not want to make a specific amendment, you can press **Undo** next to the change to cancel this.

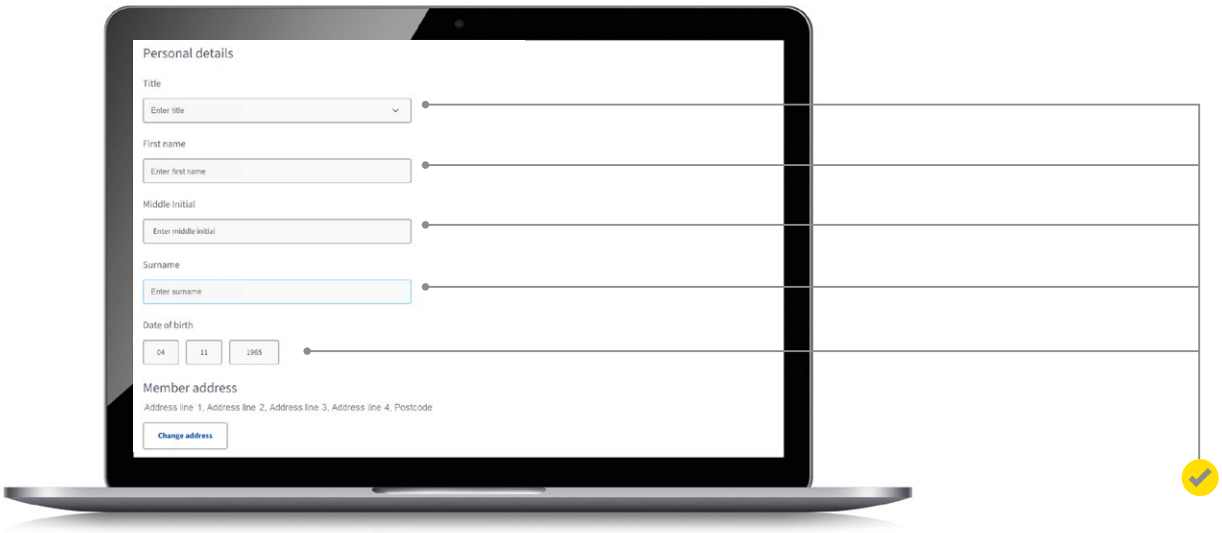
If you want to make any further amendments before submitting the changes on this screen press **Make further changes** to return to the policy home page to start another change journey. Once you have filled in your email address and are happy with these changes simply press **Submit**.

Update member (SME)



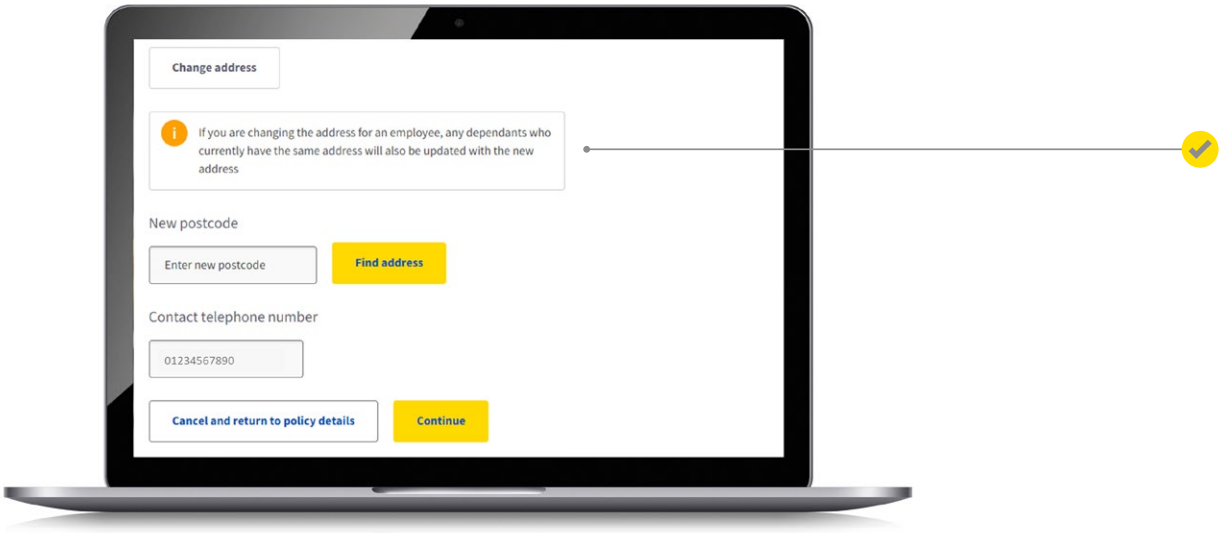
1 To update a members personal details, select **Update member** at the top of the policy screen and then search for the member you want to make the addition to.

Choose the main member by selecting the box next to their name and then press **Continue** to advance to the next screen. Note: you can only change a members' title, name or address.



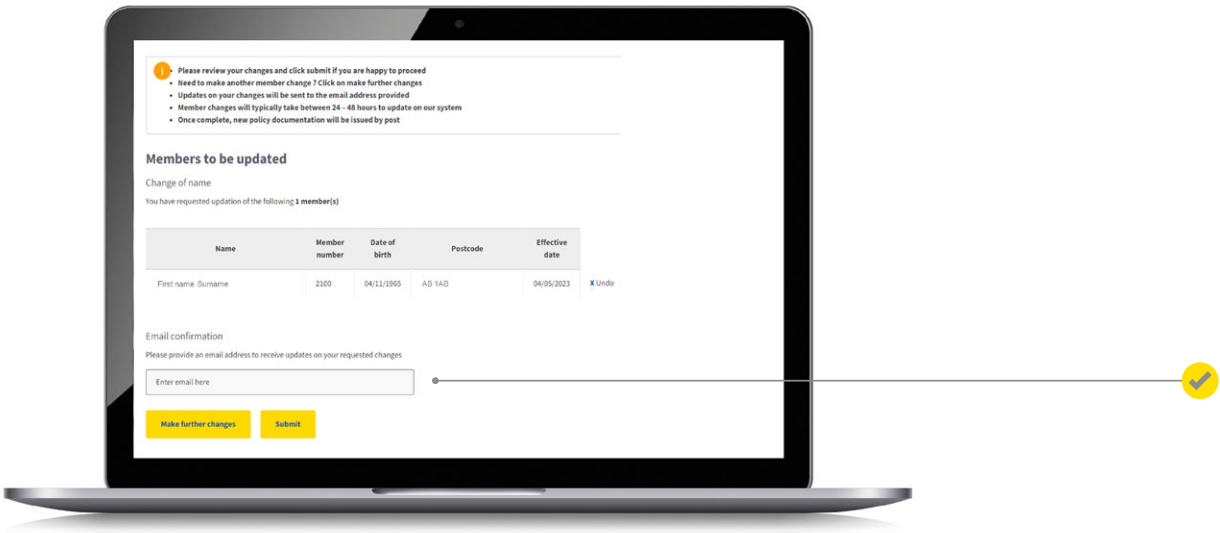
2 From this screen you can change the members details. To change an address, select **Change address** and follow the instructions in part '2a'.

If you don't need to amend the address proceed to part 3.



2a The above screen will appear to type the new postcode in and then select the new address from the list that appears. When you update the address of the main member this will update for all associated dependants with the same address.

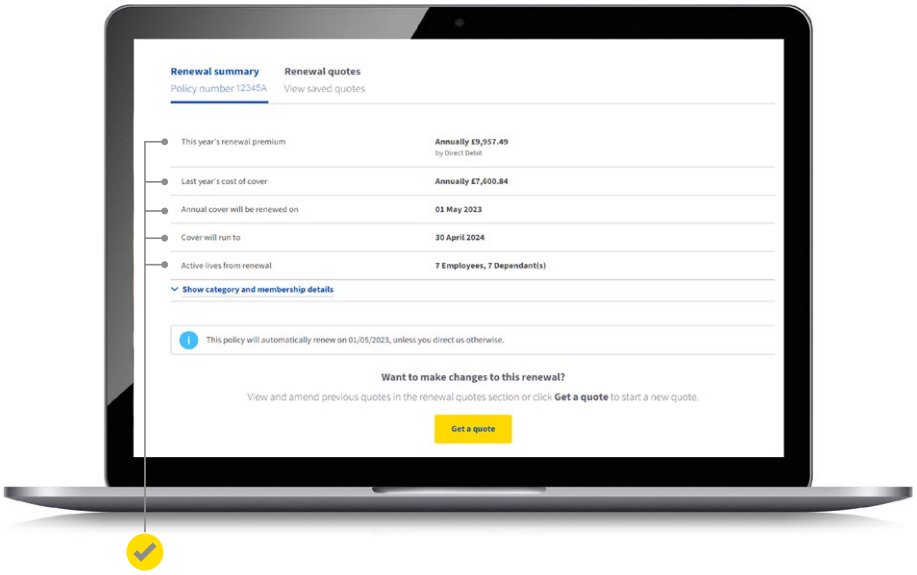
3 If you decide you don't want to carry out the amendments, press **Cancel and return to policy details** to cancel changes and return to the policy home page. After you have made all of your required amendments to your members, select **Continue** to advance to the next screen.



4 This screen will confirm the details of the changes you are about to make. All you have to do is provide your email address to receive confirmation of your changes made. If you decide you do not want to make a specific amendment, you can select **Undo** next to the change to cancel this.

If you want to make any further amendments before submitting the changes on this screen press **Make further changes** to return to the policy home page to start another change journey.
Once you have filled in your email address and are happy with these changes simply click **Submit** to save the changes.

Renewal and renewal quoting (SME)

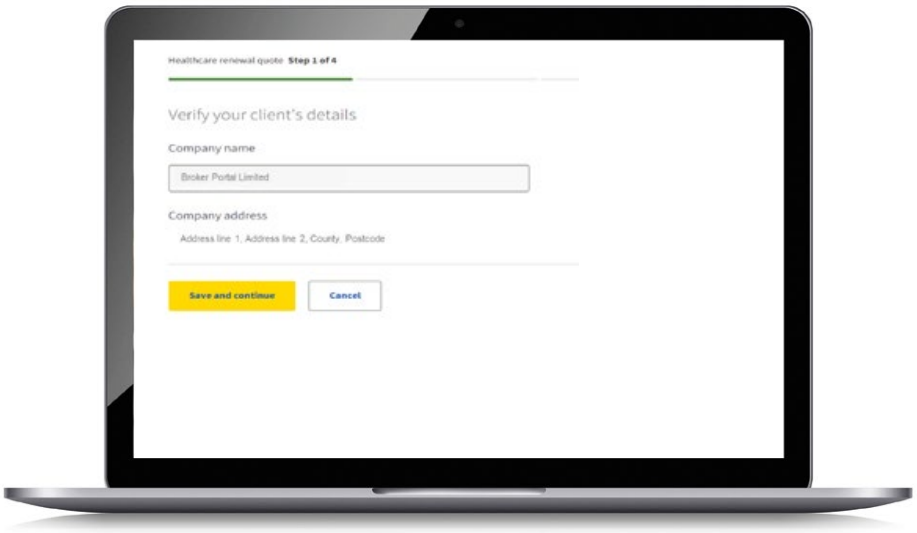


1 By clicking the **Renewal details** button you will see a high level summary of the policy renewal. This includes:

- This years renewal premium
- Last years cost of cover
- Renewal date
- Cover run to date
- Active lives & dependant

In the renewal view page you can also use the **Get a quote** function at the bottom of the page. This will allow you to requote an existing policy renewal at your own leisure. Here you can quote to:

- Amend company name
- View company address
- Manage the benefits available & view the membership under each benefit category
- Add new categories of cover
- Add employees
- Add dependants
- Delete member



Roll over the buttons to see each step.

View Step 1

View Step 2

View Step 3

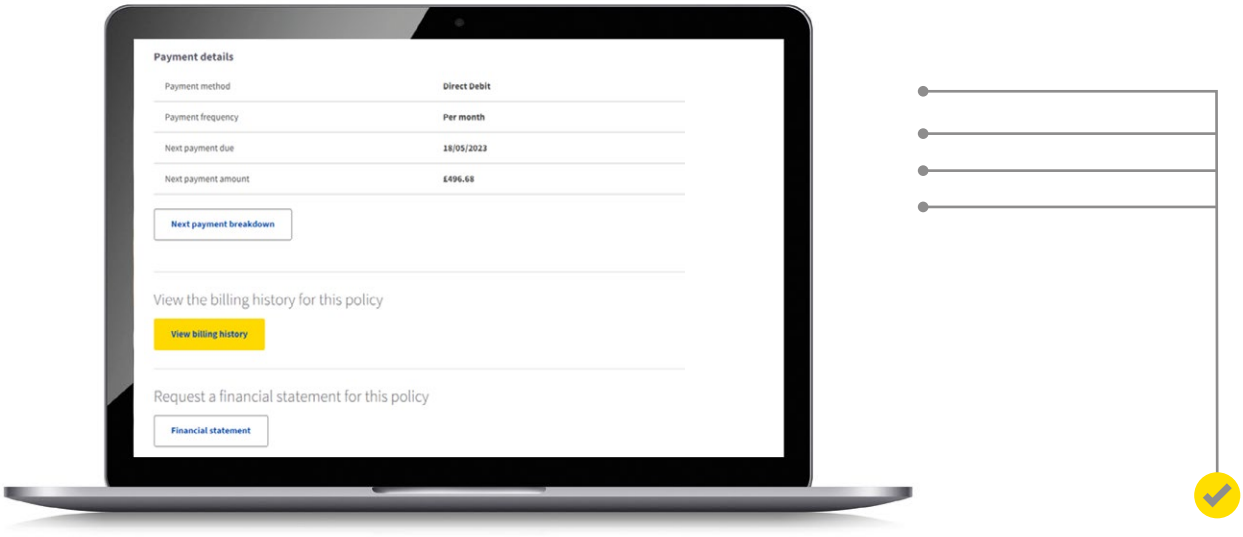
View Step 4

2 Complete Steps 1-4 and once you have clicked **Save and get price** you will be able to view the revised renewal premium along with a reminder of what the premium was before you made any changes.

You also have the option to view the Categories and Membership again by clicking the blue link. If you would like to make additional changes you can click **Modify quote** to take you back to step 1. You will then be able to make further changes. If you do not need to make any further changes you can click **Save quote**.

3 Here you can view all the information relating to the quote and have the ability to produce the illustration. By clicking **Download illustration** a copy of the quote will open in a new browser window for you to save.

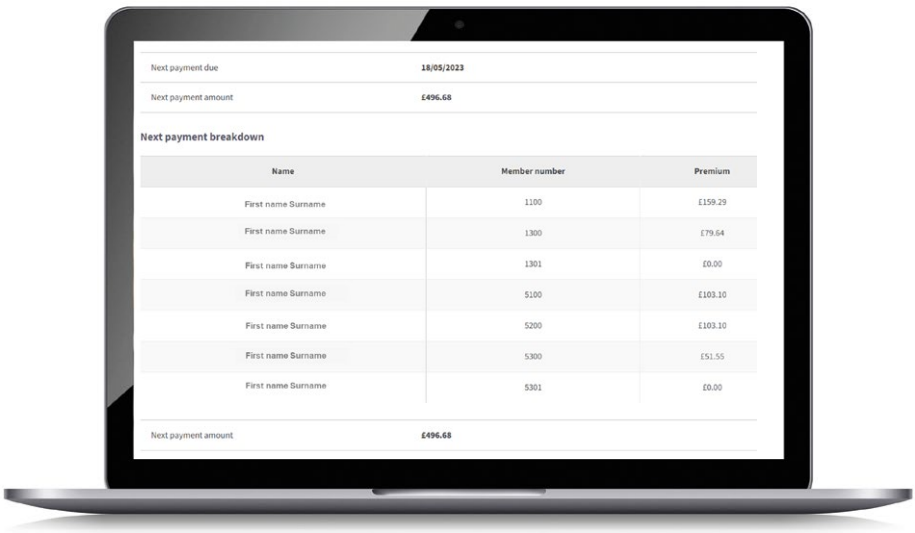
Billing history (SME)



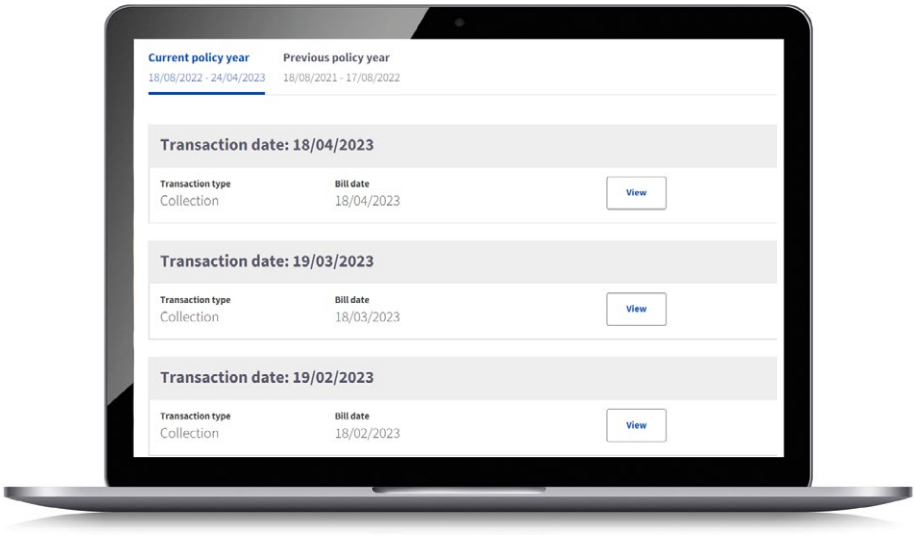
1 Within the Billing Information feature you will see a summary

- the payment method
- payment frequency
- the next payment due date
- the next payment amount
- breakdown of next payment

To access historical billing transactions or refunds, simply click the **View billing history** tab

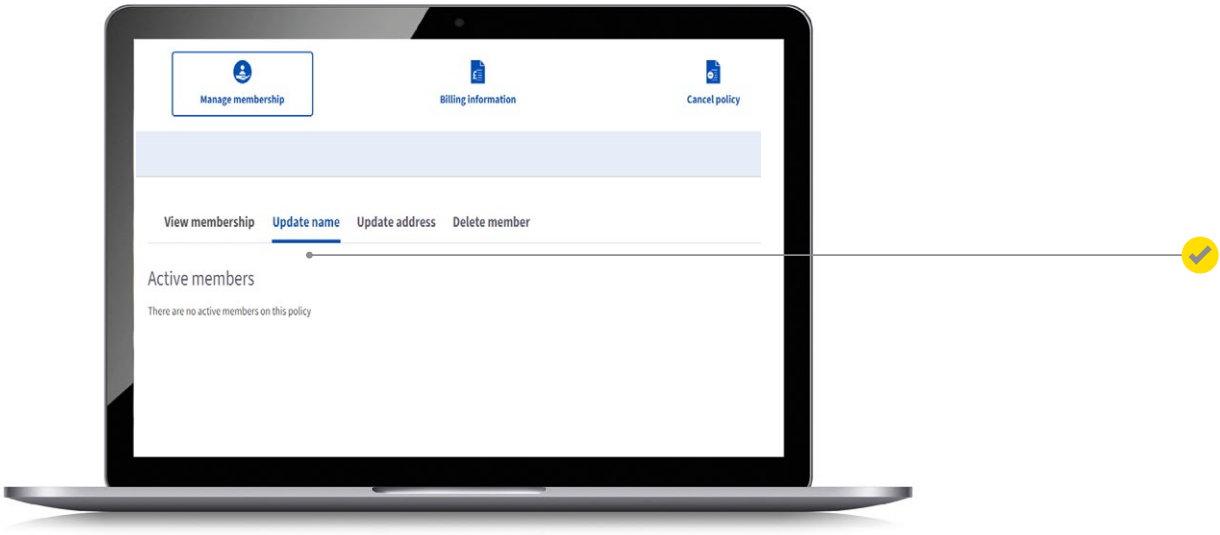


2 You have the option to view the next payment breakdown, as above.
Click on **Next payment breakdown**.



3 When you click billing history, you will see a list of billing transactions or refunds in date order. In order to view a breakdown of the transaction / refund simply click **View**.

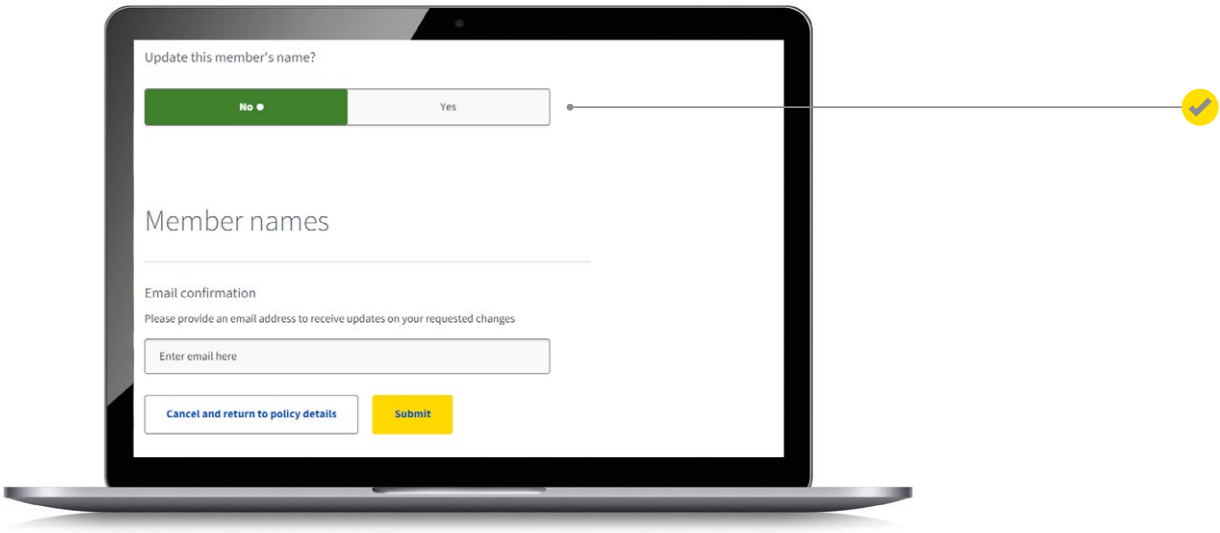
Update name (Consumer)



1 Within the manage membership tab, you will see the following options:

- View membership
- Update name
- Update address
- Delete member

To update a members name, please click on the **Update name** tab.

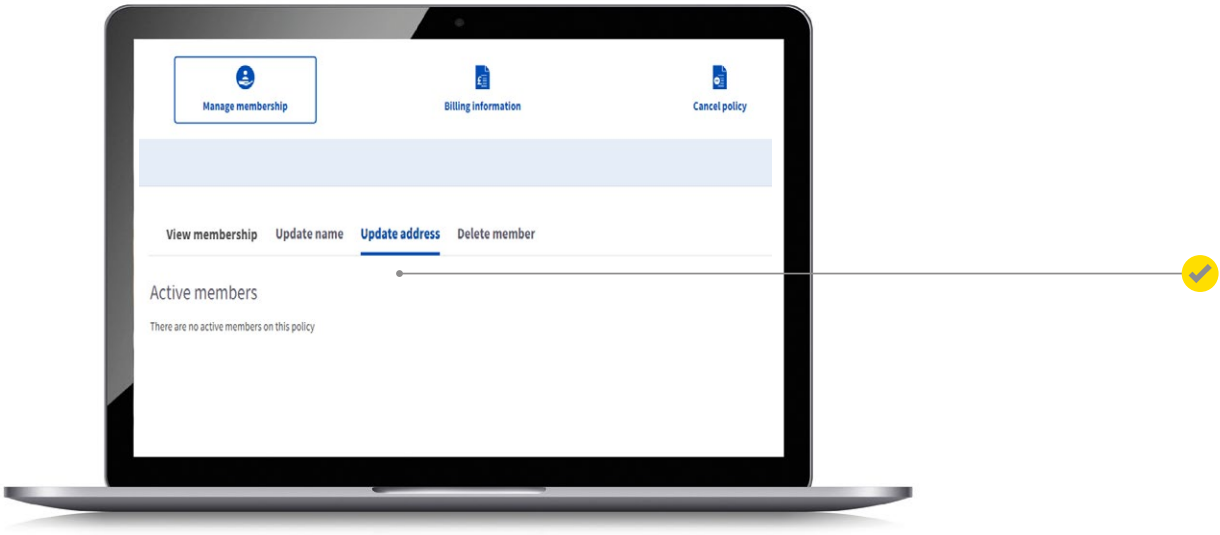


2 You will then be asked which member you need to update, please select.

If you have selected an incorrect member or no longer want to update this member, you can select **Cancel and return to policy details**.

If you are happy with the update, please enter your email address and press **Submit**.

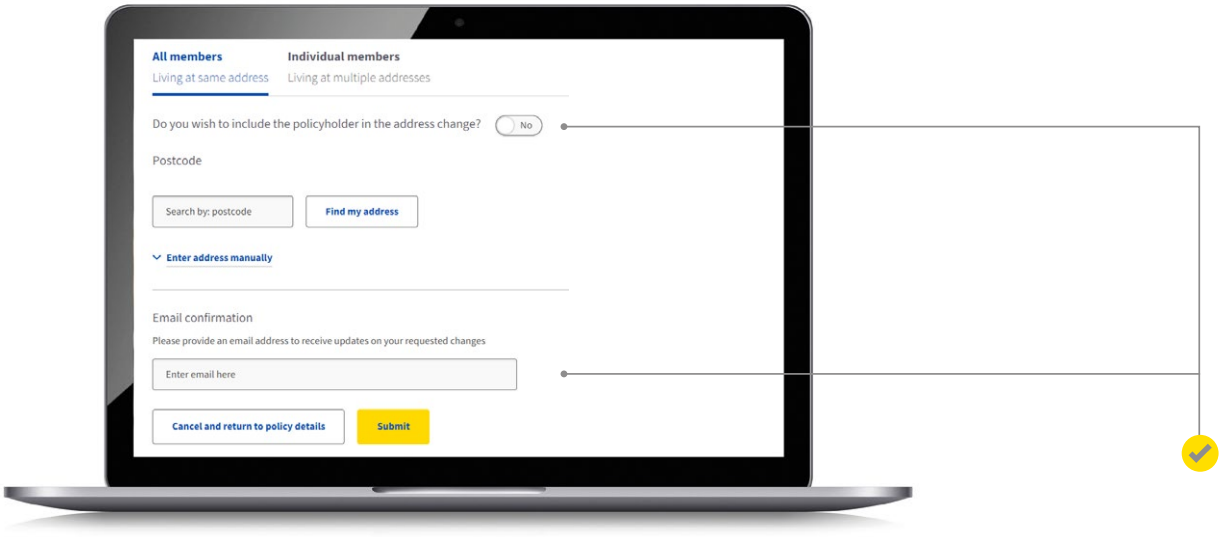
Update address (Consumer)



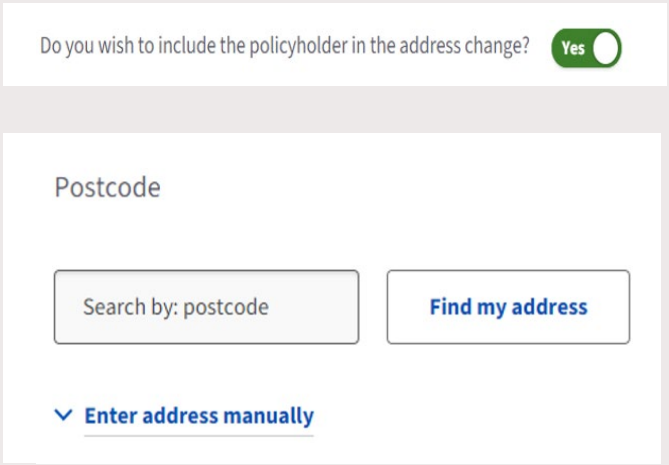
1 Within the manage membership tab, you will see the following options:

- View membership
- Update name
- Update address
- Delete member

To update a members address, please click on the **Update address** tab.



2 You will then be asked if all members addresses need updating or an individual member, please select as needed.



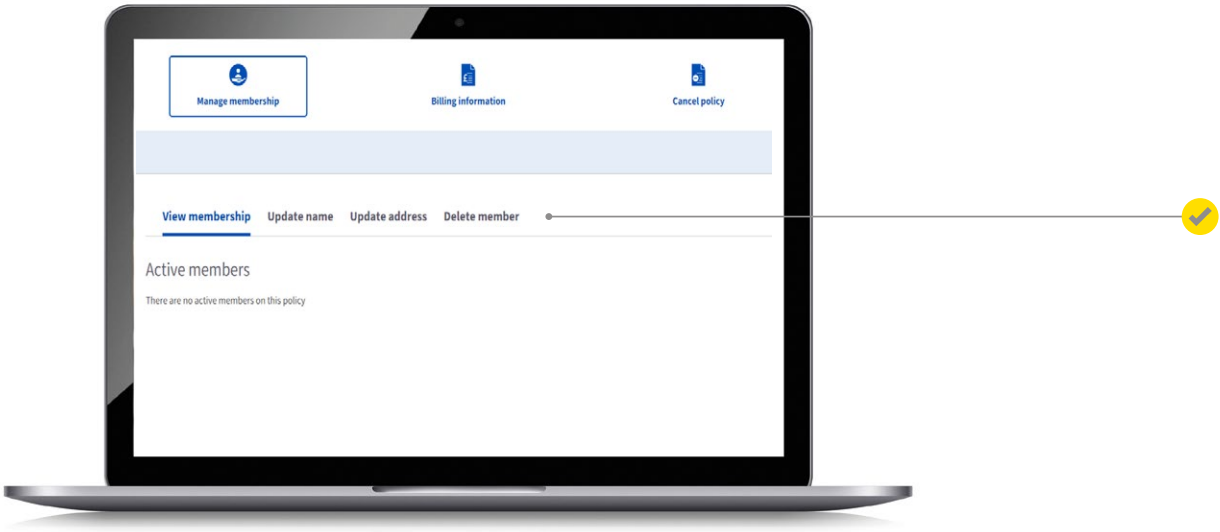
If the policyholders address needs to be updated, please slide the button.

You will then have the option to enter the postcode and select the address or enter the address manually.

If you have selected incorrectly or no longer need to update the address, you can select **Cancel and return to policy details** to return to the main page.

If you are ready to update the address please enter your email address and press **Submit**.

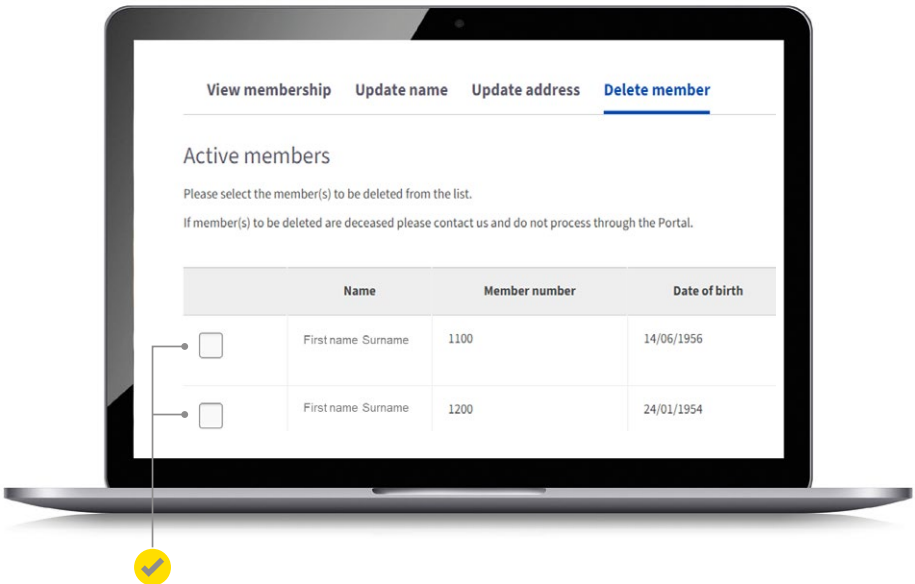
Delete member (Consumer)



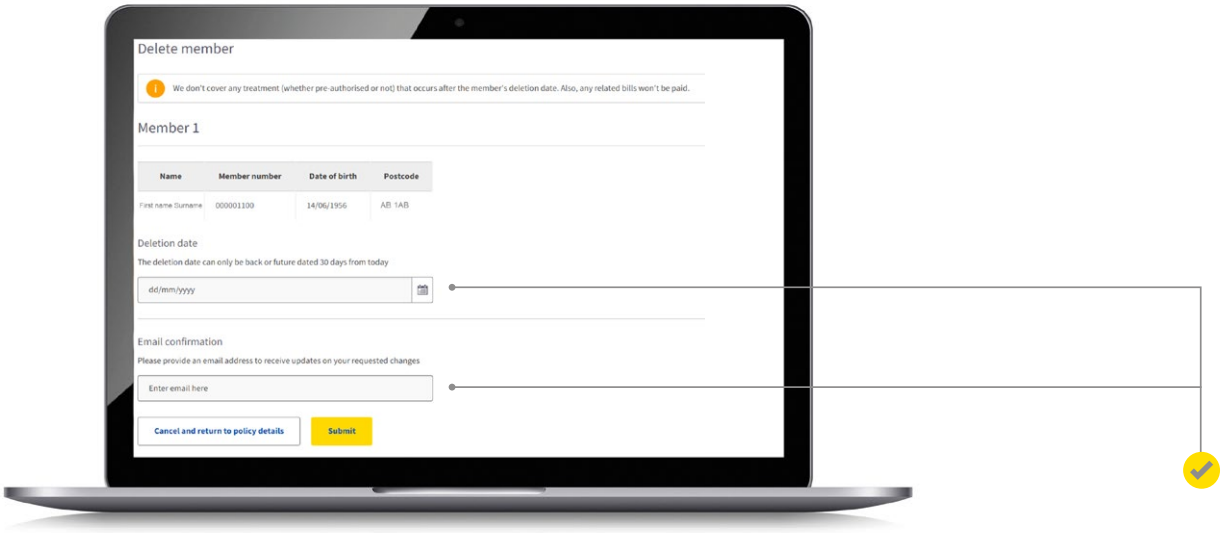
1 Within the **Manage membership** tab, you will see the following options:

- View membership
- Update name
- Update address
- Delete member

To delete a member, please click on the **Delete member** tab.



Select the member that needs deleting.

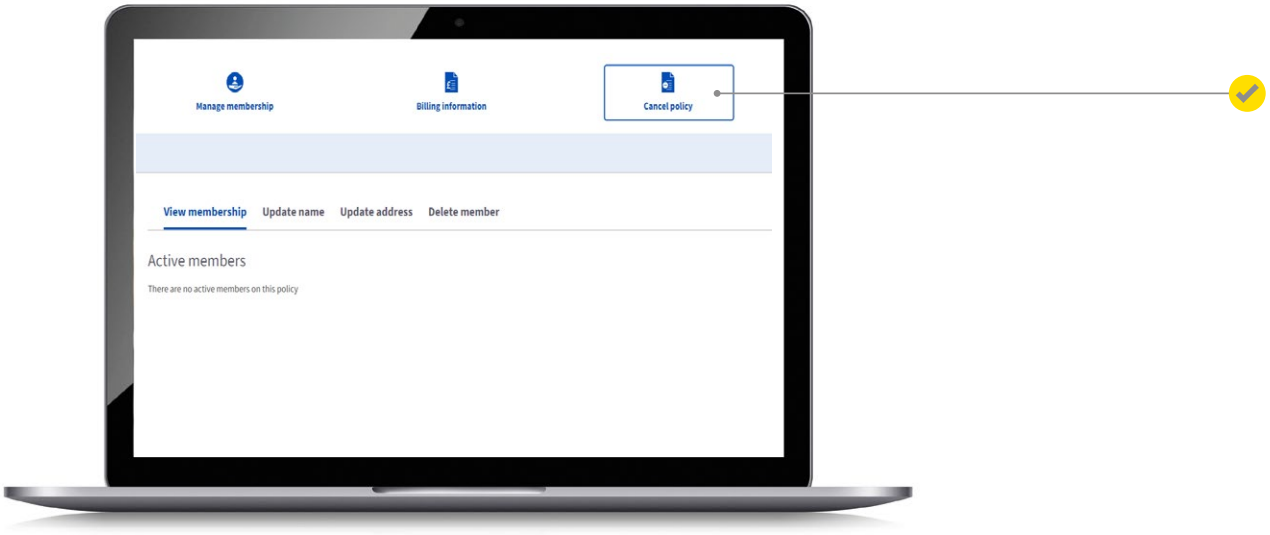


2 Once the relevant member is selected, enter the date of deletion, then your email address.

If you have selected incorrectly or no longer need to update the address, you can select **Cancel and return to policy details** to return to the main page.

If you are ready to delete the member please enter your email address and press **Submit**.

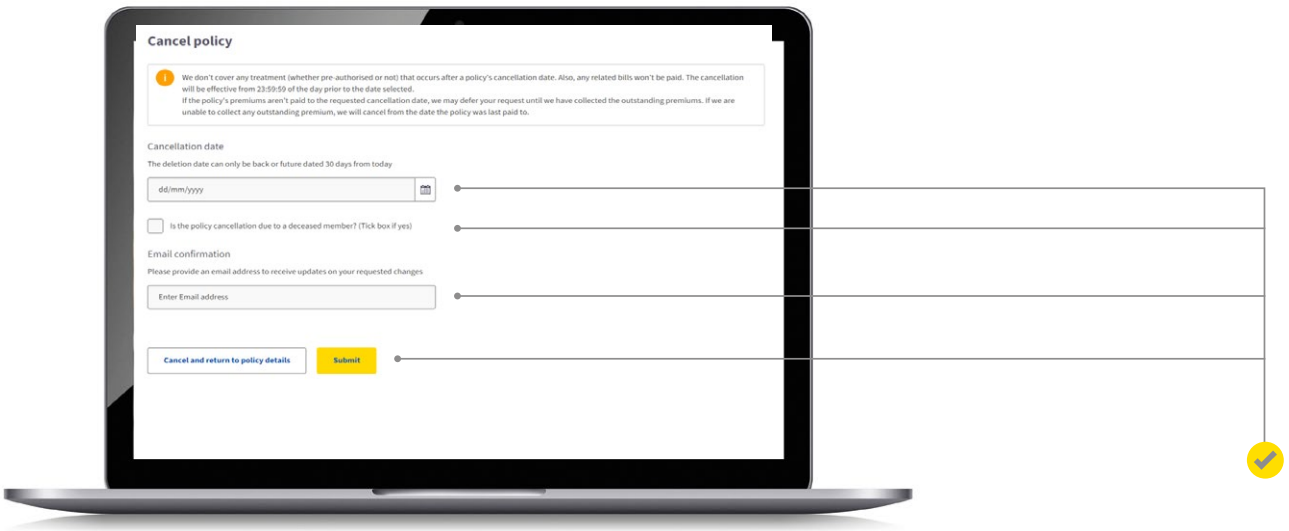
Cancel policy (Consumer)



1 Within the manage membership tab, you will see the following options:

- View membership
- Update name
- Update address
- Delete member

To cancel the policy, please click on the **Cancel policy** tab.



2 Enter the cancellation date required, (if the member is deceased, please tick the box to highlight this). Then provide your email address for confirmation.

If you have selected incorrectly or no longer need to update the address, you can select **Cancel and return to policy details** to return to the main page.

If you are ready to delete the member, enter your email address and press **Submit**.

| Retirement | Investments | Insurance | Health |

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Aviva Health UK Limited acts as agent of Aviva Insurance Limited for the purposes of: (i) receiving premium from our clients; and (ii) receiving and holding claims money and premium refunds prior to transmission to our client making the claim or entitled to the premium refund. **aviva.co.uk/health**

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