Using the Secure Client Portal

The secure client portal is a website that allows agents and clients to communicate with each other securely. It gives the ability to:

- Send and receive questionnaires.
- Send and receive messages.
- Provide and receive documents.
- Allows the clients to know how their application is progressing.

Getting to know the various sections of the Portal

1. The Main details section

1. Your **File Reference Number**.

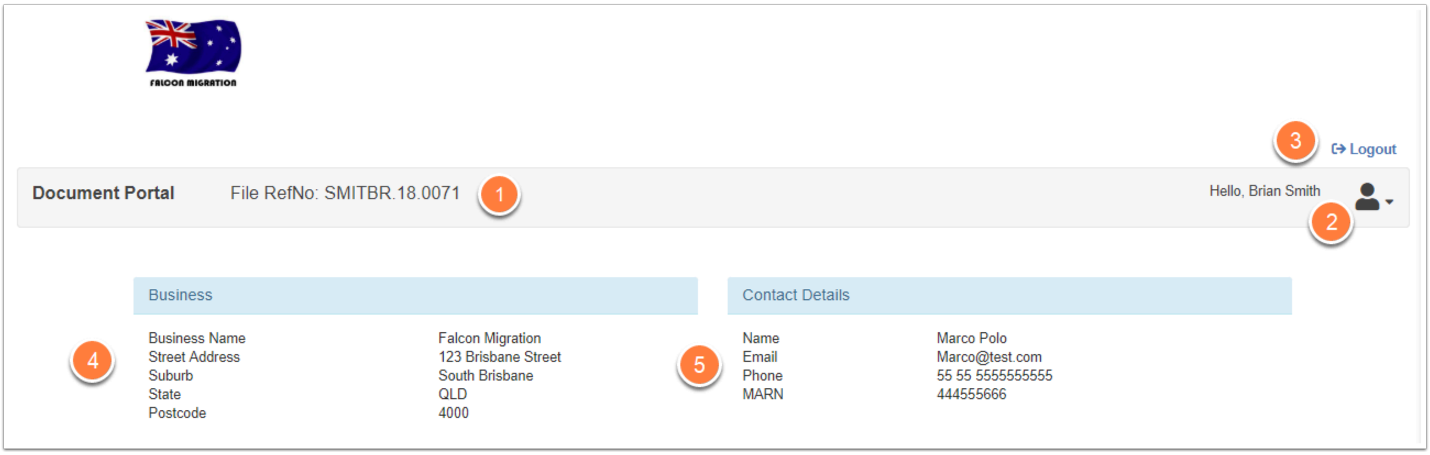
2. Your **User Icon**. You can click on this icon to:

- Change your **User Name**.
- Change your **Password**.
- Or to **Logout**.

3. **Logout** of the Portal.

4. The **Business Details** of your Agent.

5. The specific **Contact Details** for the person handling your case.



2. Your Message Inbox

1. Your **Inbox** showing the number of *unread* messages.

2. The **Refresh** button. You can use this to refresh your Inbox if you know your Agent has just sent communication.

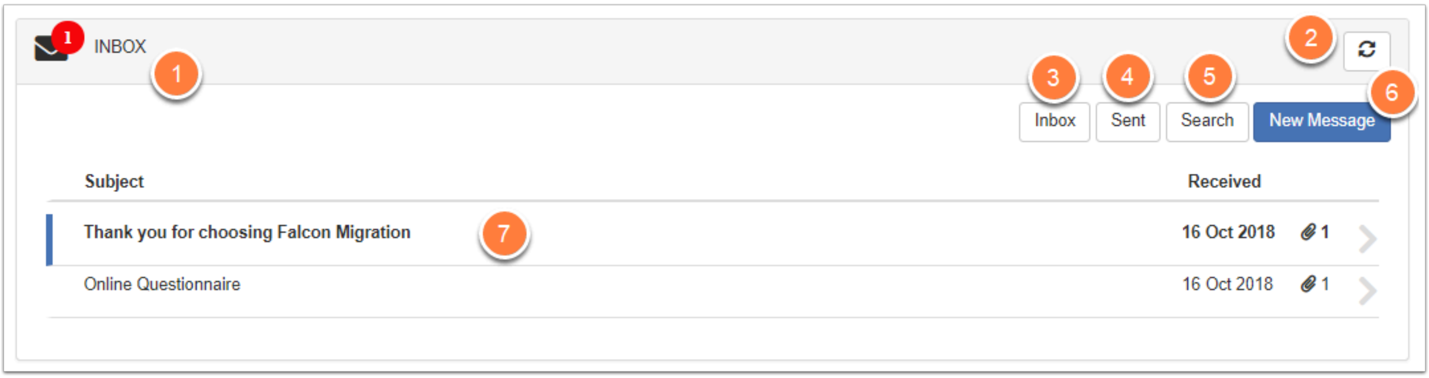
3. The **Inbox** icon will open up a Larger window to view all your Inbox items.

4. The **Sent** icon will open up a Larger window to view all your Sent items.

5. The **Search** icon allows you to search for specific **Subject** or **Body** text in your messages.

6. The **New Message** icon allows you to send messages to your Agent via the Secure Portal.

7. The list of your **received** messages. **Click anywhere** on a row to open that message.



3. Activities

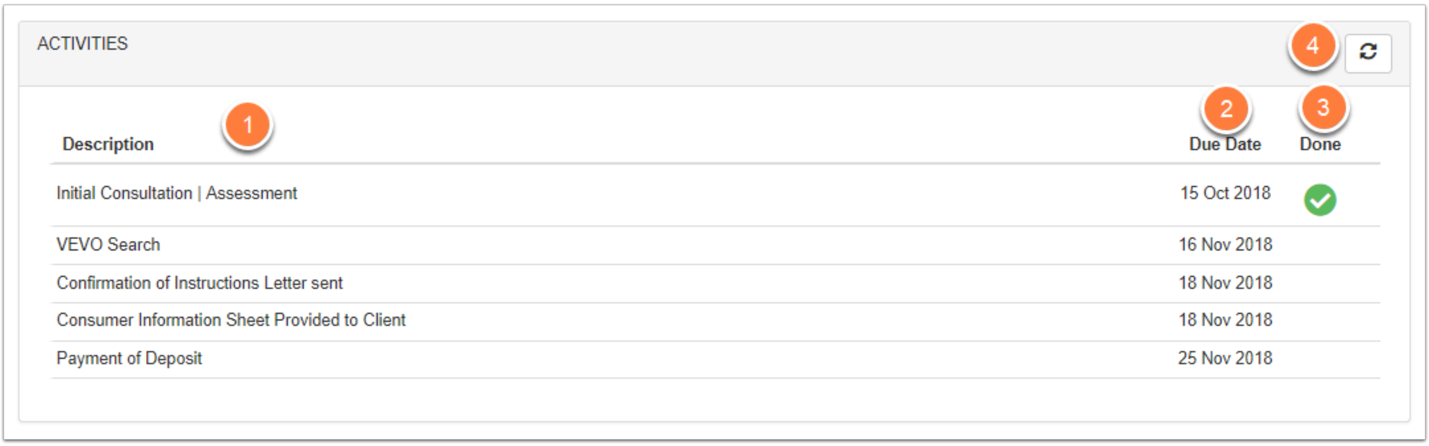
The Activities Window shows you all the Activities for the Application. This is an easy way for you to track the progress of your application.

1. The **Description** of the Activity.

2. The **Due Date** for this Activity to be completed by.

3. When the Agent marks the Activity is complete, a **green tick** will appear in the **Done** column.

4. The **Refresh** button. You can use this to refresh your Activities if you know your Agent has just made a change.



4. Documents Required From You

The **Documents Required from You** section is a list of Documents your Agent requires to be able to process the application.

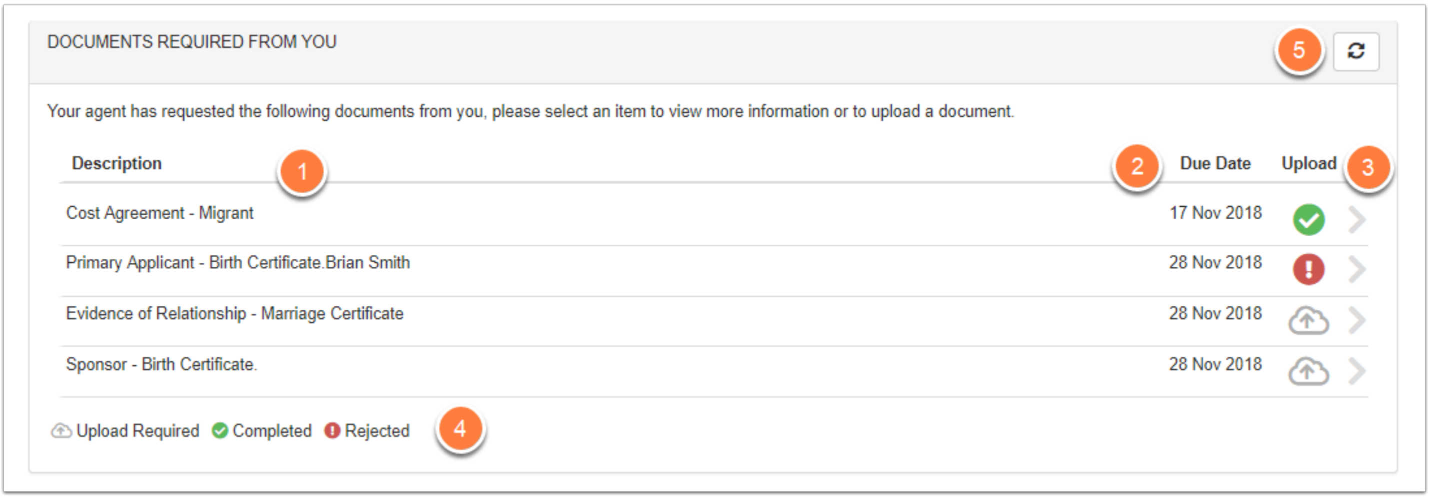
1. The **Description** of the Document Required. **Click anywhere** in the line to open details of the request and to upload that document (see section 4.1).

2. The **Due Date** this Document is required by.

3. The **Upload Status**, See point 4 for the Legend details.

4. The Upload Status **Legend:**

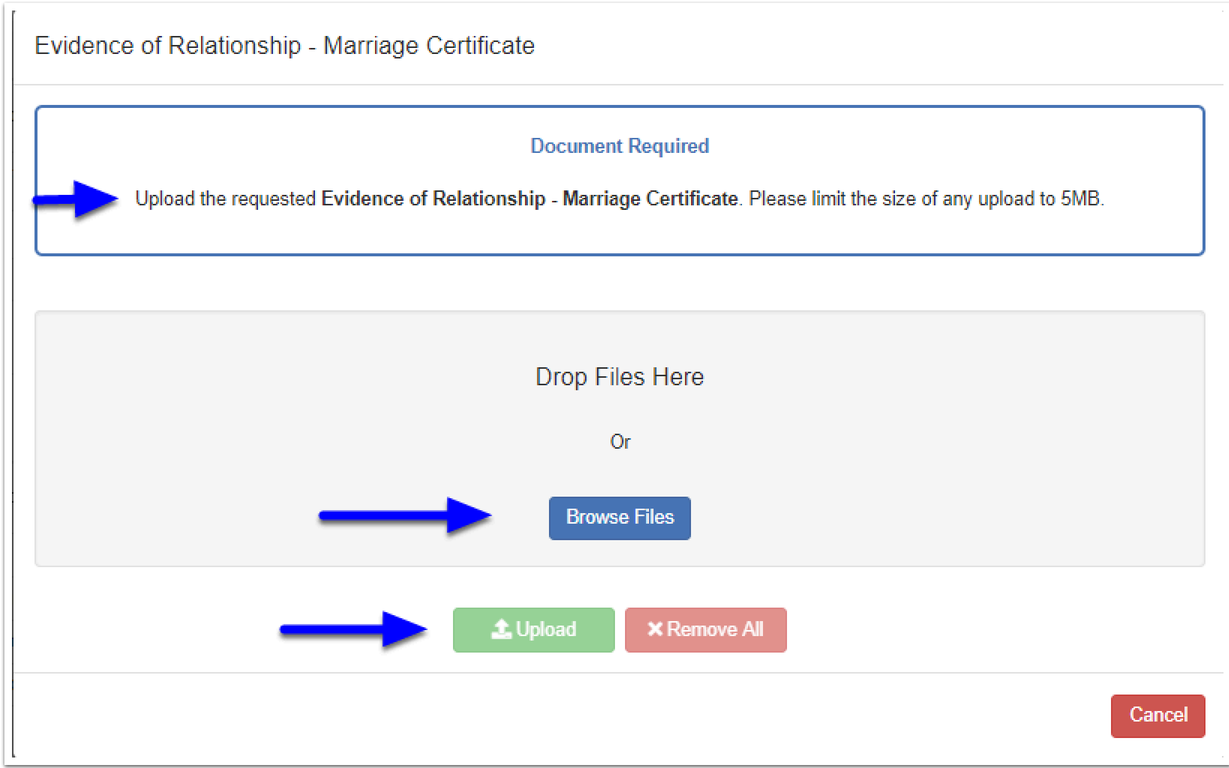
- **Upload Required**. The Document has not yet been uploaded to the Agent.
- **Complete**. The Document has been uploaded to the Agent.
- **Rejected**. The document has been uploaded, but has since been rejected by the Agent. This may be because of quality issues, incomplete documents or the incorrect document was supplied.



By clicking anywhere in the line for the required document, a window will appear giving you details of the Document and the ability to upload that document to the Agent.

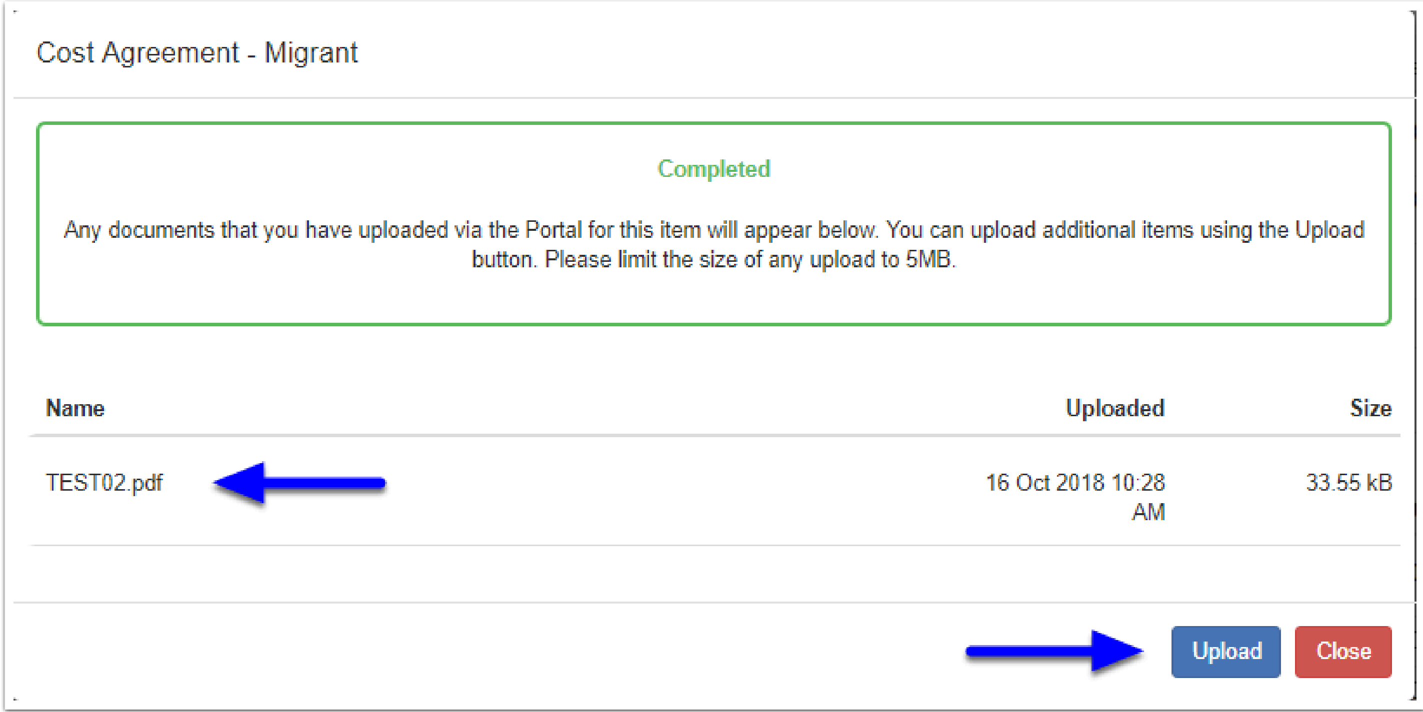
4.1. Clicking a Document with the Status of "Upload Required"

A description of the **Document Required** will show. Click the **Browse Files** button to select your File/s (or Drag and Drop), then click the **Upload** button to upload the document/s to the Agent.



4.2. Clicking a Document with the Status of "Complete"

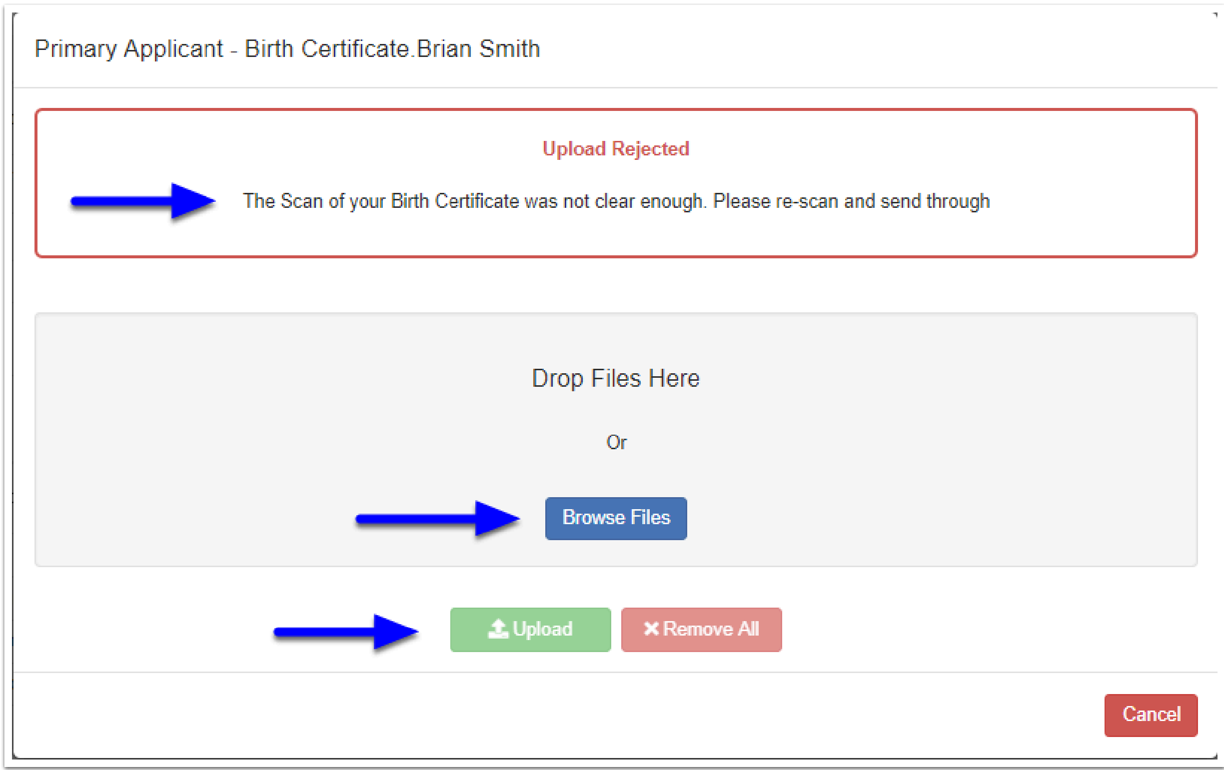
Details of the Document/s you have uploaded will appear including the time of upload. If you wish to add additional documents, you can click the **Upload** button.



4.3. Clicking a Document with the Status of "Rejected"

When an Agent has had to reject a document, they will enter a reason for the Rejection.

Click the **Browse Files** button to select your new File/s (or Drag and Drop), then click the **Upload** button to upload the new document/s to the Agent.



Below is a video guide on how to use the Secure Client Portal