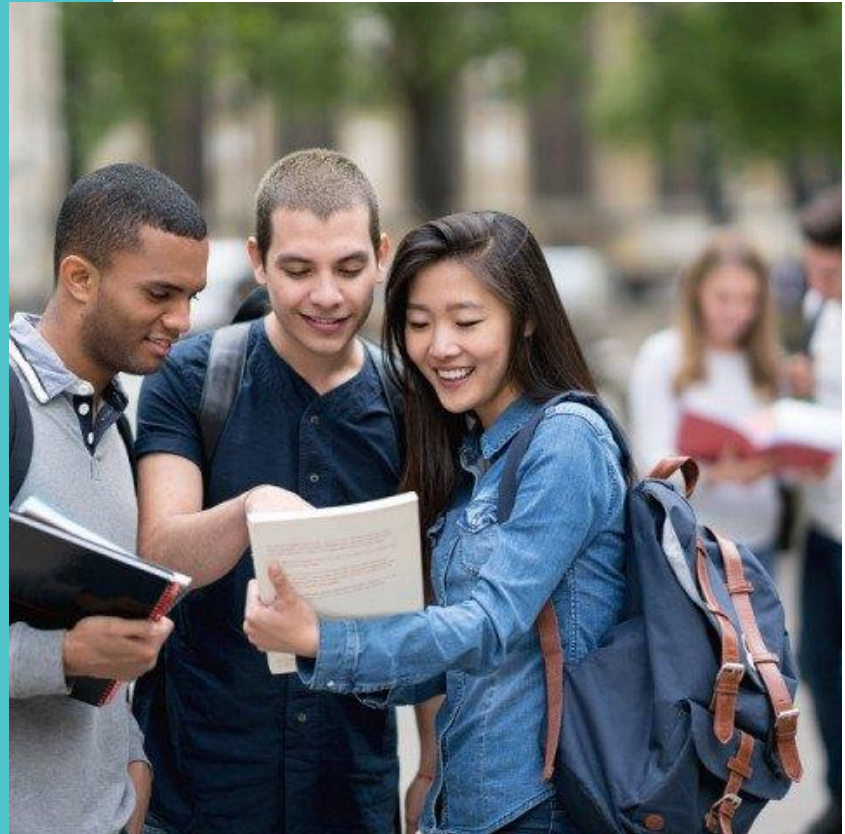


Navigating the Uni-Care Agent Portal



Logging into the portal

1. Select 'AGENTS'



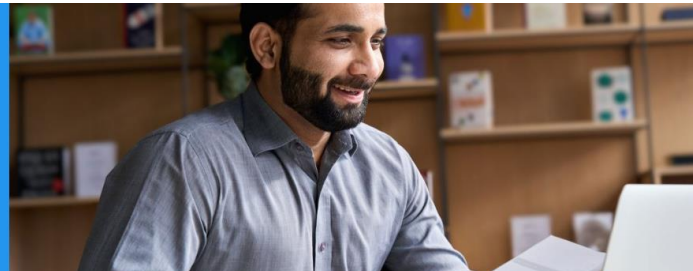
PLANS CLAIMS CONTACT **AGENTS** ABOUT

2. Select 'AGENT PORTAL' and log in with your unique credentials

AGENTS

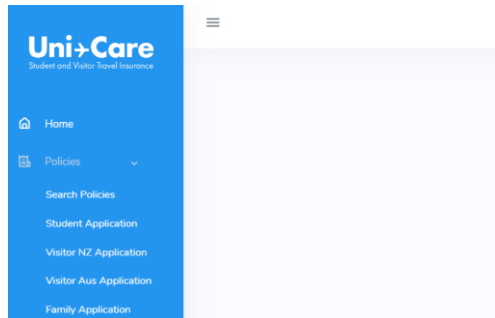
Work with Uni-Care

AGENT PORTAL



Issuing a policy

1. Log in to the system with your username password
2. Select the policy you wish to issue



3. Fill out the required customer details

Visitor NZ Application

Policy Details

Travel start date: dd/mm/yyyy Travel end date: dd/mm/yyyy Country of Origin: -- Select an option --

Personal Details

Main policy holder: Title: -- Select an option -- First name: Last name: Date of birth: dd/mm/yyyy

Contact Details

Street Address: Suburb: City: Post code: Country: -- Select an option --

Email Address: Contact phone:

4. If specified items are required (more than \$2,500 in value) you can list them here for an additional premium.

Specified Items

The policy limit for any one item, set or pair of items is \$2,500 unless the item, set or pair of items is specified and additional premium is paid. Additional premium will be charged at a rate of 2% of the full value of the item. Lesser val luggage allowance.

Do any Travellers require cover for specified items?

Yes No

Issuing a policy

What you are charged is net of commission you make by selling the policy

5. Premium summary will be shown at the bottom.

Premium Summary

Number Of Days	Premium	Govt Levy	Document Fee	Specified Items	Total Premium
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Commission	Invoice Amount				
<input type="text"/>	<input type="text"/>				

Save Application

Purchase Policy

6. Pay the premium which will issue the policy. If you have an invoice arrangement with us you will receive an invoice on the 1st of the month.

Credit Card Payment

Card Number:*

Name On Card:*

Expiry Date:* MM YY

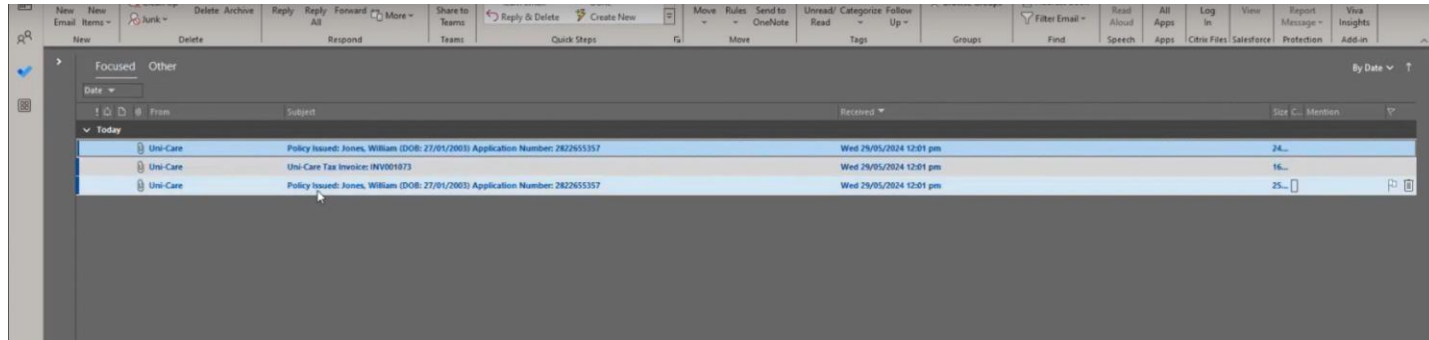
CVC:

Submit

Cancel Payment

Issuing a policy

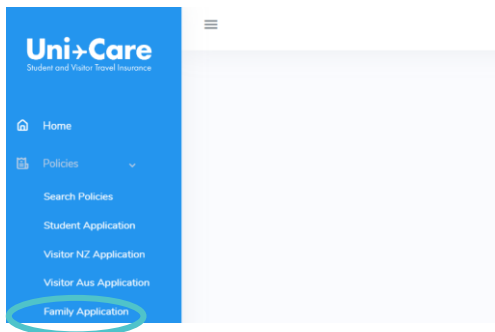
7. Corresponding policy documentation will be issued



- For emails containing policy documentation, you can inform us if you would like these to go to both you and the customer, you only or directly to the customer.
- If you pay by credit card, a tax invoice will be sent to email address you've specified for accounts each time a policy is issued. For monthly invoice it will be once per month.

Searching and editing

1. Select “Search Policies” from the menu items:



2. Search by Policy number, first name or last name.



A search form with three input fields: 'Policy Number', 'First Name', and 'Last Name'. The 'Last Name' field contains the text 'Jones'. To the right of the input fields are two buttons: a green 'Search' button and a blue 'Reset' button.

3. Select the policy number to open the policy



A screenshot of the search results page. At the top, there is a search form with the same input fields and buttons as in the previous step. Below the search form, there is a table with the following columns: Policy Number, Policy Status, First Name, Last Name, Date Of Birth, Plan Name, Start Date, and End Date. The table contains one row of data.

Policy Number	Policy Status	First Name	Last Name	Date Of Birth	Plan Name	Start Date	End Date
2822659357	Paid	William	Jones	27/02/2003	Visitor NZ	31/05/2024	19/10/2024

Searching and editing

You can view policy details and depending on the status of the policy you may be able to make changes as required:

If the policy is in 'Application' status or is set to 'Unpaid':

- You can change the policy details including start date, end date and country of origin.
- You can change the personal details and add/remove travellers where applicable.
- You can update the contact details.
- You can add/remove specified items.
- You can edit or lapse these policies.

If the policy is in 'Paid':

- If the policy has not commenced, you can change the policy details including start date, end date and country of origin.
- You can update the contact details.

Note:

- Some changes will result in an additional premium and will be payable immediately if by credit card or will reflect on your next monthly invoice.
- If other changes are required, you can contact the Uni-Care team.