

User Guide to access Notification Letter on Change of New Servicing Life Planner In ALPP Portal and My AIA Customer Portal

29 October 2021

**CUSTOMER:
My AIA CUSTOMER PORTAL**

Step 1 : Login to My AIA Customer Portal

- Key in User ID and Password and click “Login” button

WELCOME TO MY AIA

User ID

Password

[Forgot User ID/Password?](#)

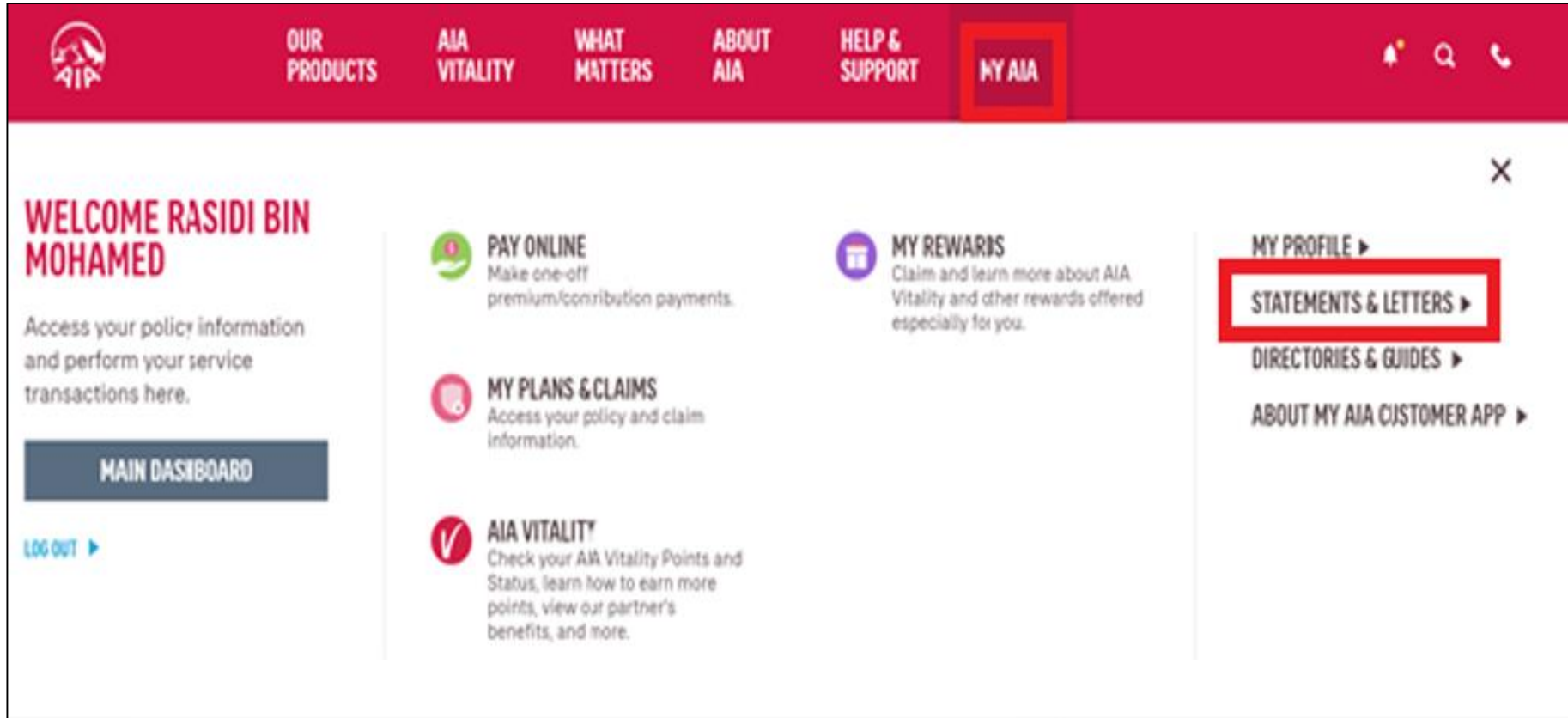
LOGIN

New user? [Register here](#)

My AIA
ALL YOUR WELLBEING NEEDS.
ALL IN ONE APP

Download on the App Store | GET IT ON Google Play | Available on the AppGallery

Step 2 : Click on “My AIA” and select “Statements & Letters”



Step 3 : Statements & Letters:

- 1) Click on “Letters”
- 2) Select a policy and select a transaction year OR
- 3) Click on TCF Letter

AIA

← DASHBOARD


Policy Statements | Home Loan Statements | **Letters** | E-Receipts

2 Select a policy Select a transaction year

S000006A06 2021

3 **LETTERS**

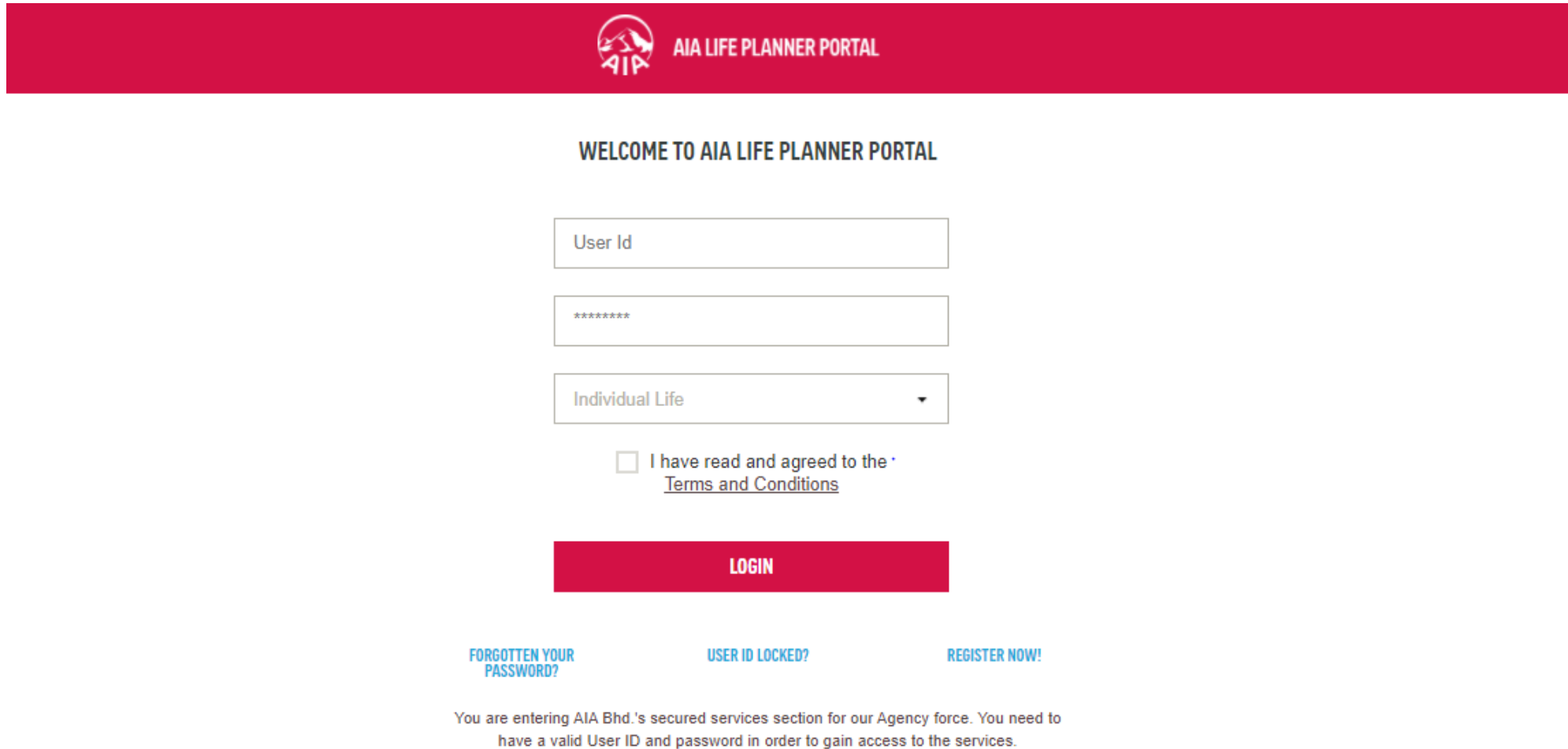
Note: For these following endorsement letters*, only those issued from 10 October 2017 and onwards are made available on MY AIA.
*Cover Boost; Signature Boost; Yearly Cash Bonus; PB Wealth Boost & Empower

 TCF Letter	2021
--	------

NEW SERVICING LIFE PLANNER AND LEADER: ALPP PORTAL

Step 1 : Login to ALPP

- Key in your Life Planner ID and Password, ✓ box and click “Login” button



The screenshot shows the AIA Life Planner Portal login interface. At the top, there is a red header bar with the AIA logo and the text "AIA LIFE PLANNER PORTAL". Below the header, the text "WELCOME TO AIA LIFE PLANNER PORTAL" is displayed. The login form consists of three input fields: "User Id", a password field with asterisks, and a dropdown menu currently set to "Individual Life". Below the fields is a checkbox labeled "I have read and agreed to the Terms and Conditions". A prominent red "LOGIN" button is centered below the form. At the bottom, there are three links: "FORGOTTEN YOUR PASSWORD?", "USER ID LOCKED?", and "REGISTER NOW!". A disclaimer at the bottom states: "You are entering AIA Bhd.'s secured services section for our Agency force. You need to have a valid User ID and password in order to gain access to the services."

Step 2 : Select Business Entity

- By default, system will display Business Entity as Conventional
- Click on Takaful if want to change Business Entity to Takaful

The screenshot displays the AIA Life Planner Portal interface. At the top, a red navigation bar contains the AIA logo and the text 'AIA LIFE PLANNER PORTAL'. To the right of the logo are menu items: HOME, REPORTS, MY SERVICING, RESOURCES, and AIA APPLICATIONS. On the far right of the navigation bar are icons for a chat bubble and a user profile. Below the navigation bar, the user's profile information is partially visible, including 'INDIVIDUAL LIFE' and 'GID | PLS TAKAFUL CS', where 'TAKAFUL' is highlighted with a red box. The main content area is divided into three sections: 1. 'HEADLINES' with a sub-header 'Agency Circular 012/10/2021 : IMPORTANT NOTICE! Improper Selling of AIA Insurance and Use of Unapproved Marketing Materials' and a 'VIEW MORE HEADLINES ...' link. 2. 'IMPORTANT UPDATES' featuring a carousel of four promotional cards: 'WHAT IS REPURCHASING', 'CONVERSATION IDEAS WITH CUSTOMERS', 'HUNTER VS FARMER', and 'TOP TIPS TO EXCEL IN PUBLIC RELATIONS'. 3. 'BUSINESS PLANNER' with a 'BSC DASHBOARD' button.

Step 3 : My Servicing

- Click on My Servicing and select “Policy Status Enquiry”

The screenshot displays the AIA Life Planner Portal interface. The top navigation bar is red and contains the following menu items: HOME, REPORTS, MY SERVICING (highlighted with a red box), RESOURCES, and AIA APPLICATIONS. On the right side of the navigation bar, there are icons for a speech bubble and a user profile. Below the navigation bar, the main content area is divided into three columns: NEW BUSINESS, POLICY SERVICING, and CLAIMS. The POLICY SERVICING column contains a list of options, with 'POLICY STATUS ENQUIRY' highlighted by a red box. Other options in this column include 'POLICY SERVICING SERVICE LEVEL', 'POLICY SERVICING GUIDELINES', 'RENEWAL / PRE-LAPSE / LAPSED / DEFERMENT OF PREMIUM PAYMENT PROGRAM LISTING', 'RENEWAL REMITTANCE', 'BIRTHDAY / FESTIVE LISTING', 'PREMIUM STATEMENT/ANNIVERSARY STATEMENT/FINANCIAL STATEMENT', 'GCP & YEARLY CASH BONUS', 'AUTO DEBIT REJECTED LISTING', and 'CUSTOMER TAX INVOICE/CREDIT NOTE'. The NEW BUSINESS column includes 'NB GUIDES AND REFERENCES', 'NB DASHBOARD', 'NB PROPOSAL STATUS', 'NB OUTSTANDING DEFERMENT LISTING', and 'PROPOSAL NUMBER ALLOCATION'. The CLAIMS column includes 'CLAIMS SERVICE LEVEL', 'CLAIMS EASY GUIDE', 'AIA MEDICAL CARD', 'CLAIMS FLYERS AND UPDATES', and 'CLAIMS STATUS ENQUIRY'. The AIA logo and 'AIA LIFE PLANNER PORTAL' text are visible in the top left corner.

Step 4 : Policy Status Enquiry by the following selection and click on “Submit” button

- Insured/Payor/Owner Name
- Insured/Payor/Owner NRIC No
- Policy Number
- Agent code

The screenshot displays the AIA Life Planner Portal interface. At the top, there is a navigation bar with links for HOME, REPORTS, MY SERVICING, RESOURCES, and AIA APPLICATIONS. Below this, the page title is 'INDIVIDUAL LIFE' with sub-links for GID, PLS, TAKAFUL, and CS. The current time is 10:37 PM, 25 October 2021. The main heading is 'POLICY STATUS ENQUIRY'. Underneath, there are radio buttons for 'Personal' (selected) and 'Group'. The 'Enquire By' dropdown menu is open, showing options: 'Insured/Payor/Owner Name.', 'Insured/Payor/Owner NRIC No.', 'Policy Number', 'Agent Code', and 'Please Enter Name Here...'. The 'Status' dropdown menu is set to 'All Status'. A red 'SUBMIT' button is located at the bottom of the form.

Step 5 : Policy Status Enquiry –Individual Life

- Select “Correspondence Letter”

The screenshot displays the AIA Life Planner Portal interface. At the top, there is a navigation bar with links for HOME, REPORTS, MY SERVICING, RESOURCES, and AIA APPLICATIONS. Below this, the page title is 'INDIVIDUAL LIFE' with sub-links for GID, PLS, TAKAFUL, and CS. The main heading is 'POLICY STATUS ENQUIRY - INDIVIDUAL LIFE', accompanied by a 'PRINT' button. A list of menu items is shown, with 'CORRESPONDENCE LETTER' highlighted in a red box. Other menu items include Policy Information, Payment History, Guaranteed Cash Payment (GCP) Listing/Statement, Policy Changes Status, Premium Statement/Anniversary Statement/Financial Statement, Policy Quotation, Document Submission Information, Payout Details, and Claim Enquiry. A search bar labeled 'Search Another Policy:' is present. Below the menu is a section titled 'MY BASIC POLICY INFO:' containing a table of policy details.

MY BASIC POLICY INFO:		
Policy No	InsuredName	Policy Status IN FORCE - PREMIUM PAYING
Frequency of Payment ANNUALLY	New IC No	Vitality Indicator NO
Application Date 19-FEB-2004	Effective Date 19-FEB-2004	Premium Due Date 19-FEB-2022
Premium Holiday Option N/A	Payment Method DIRECT DEBIT - CREDIT CARD MASTER	ePolicy Indicator NO
		MyAIA Acknowledge Indicator NO

Step 6 : Correspondence Letter

- Select document type “TCF Letter”
- Click “View/ Download”

The screenshot shows the AIA Life Planner Portal interface. At the top, there is a navigation bar with the AIA logo and links for HOME, REPORTS, MY SERVICING, RESOURCES, and AIA APPLICATIONS. Below this, the user is logged in as 'INDIVIDUAL LIFE' with a masked name. The main content area is titled 'CORRESPONDENCE LETTER' and contains a table with the following data:

NO.	POLICY NUMBER	DOCUMENT TYPE	DOCUMENT DATE	VIEW / DOWNLOAD
1.		TCF Letter	18-Oct-2021	

Below the table, there are two notes:

Note:
1. Our letters issued effective from April 2016 and onwards are available on ALPP for reference.
2. However, for those following endorsement letters*, only those issued from 10 October 2017 and onwards are made available here.
*Cover Boost, Signature Boost, Yearly Cash Bonus, PR Wealth Boost & Employer

At the bottom, there is a 'Navigation Options >>> BACK' button.

END