

iServe

Servicing Requests with Customer Due Diligence User Guide

24 Jun 2021

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Available Transactions

No	Transactions
1	Update Contact Details
2	Change Payment Cycle
3	Schedule Top Up
4	Update Direct Credit Instruction
5	Update Credit Card
6	Cancel Auto Debit



Login

1:57 PM Fri 18 Jun 94%

LOGIN ENG BM

ISERVE

LOGIN

Agent ID

Password

LOGIN

Forgot Password?
RESET PASSWORD

[Account not Activated?](#)

v2.42(1)


1. Login with Agent ID and Password



Customer Search

5:56 PM Fri 11 Jun 90%

☰ POLICY SEARCH ENG BM LOGOUT



NRIC / Old IC / Passport / Military or Police No.

SEARCH

1. Perform customer search using NRIC / Old IC / Passport / Military or Policy No.

Policy Selection


5:57 PM Fri 11 Jun 90%

< POLICY SEARCH POLICY DASHBOARD ENG BM LOGOUT

SUTILA

testing@aia.com 0123456789

Filter by policy status Search by person covered

 **A-LIFELINK 2**
Life Insurance


Policy No. **7033769A**
Policy Status **In Force - Premium Paying**
Person Covered **SUTILA**
Next Payment Due Date **01 Jan 2019**
Premium Amount **RM200.00**

1. Select your policy / certificate

Transaction Selection





5:57 PM Fri 11 Jun 90%


< POLICY DASHBOARD POLICY OVERVIEW ENG BM LOGOUT

 **A-LIFELINK 2**
Life Insurance

POLICY INFO | ADD-ON BENEFITS (RIDERS) | INVESTMENT PORTFOLIO | CLIENT DETAILS

Person Covered SUTILA	Policy No. 7033769A	Coverage Amount RM50,000.00
Policy Status In Force - Premium Paying	Next Payment Due Date 01 Jan 2019	Premium Amount RM200.00 inc. Govt. Tax RM0.00 Paid Monthly
Last Payment Required 01 Jan 2089	Coverage Period From 01 Jan 2016 to 01 Jan 2089	Auto Extension Coverage Term NO
Payment Method Direct Billing		
Automatic Premium Loan with Interest RM0.00	Policy Loan with Interest RM0.00	

 **UPDATE CONTACT DETAILS**  **CHANGE PAYMENT CYCLE**  **SCHEDULE TOP UP**  **UPDATE DIRECT CREDIT INSTRUCTION**

 **UPDATE CREDIT CARD**

SHOW LESS

1. Select the transaction that you wish to perform.
(Example: Update Contact Details)

Identity Verification Alert


5:18 PM Thu 17 Jun 100%

IDENTITY VERIFICATION


IDENTITY VERIFICATION

In line with our Customer Due Diligence (CDD) procedure, you are required to submit your personal details and a copy of your NRIC / passport each time you perform this transaction.


Please be informed that you will be directed to an external site to:



Update your personal info



**Upload your identity document (NRIC/Passport*)
*if applicable**



Perform OTP verification

PROCEED

1. Alert message on Review of Customer Due Diligence is required

Customer Due Diligence (CDD) for Policy Owner



Customer Due Diligence - Policy Owner 1

Policy Owner: YG 1

Policy Payor: YG

Kindly ensure the mobile number for Owner is up-to-date in order to receive verification OTP for CDD.

* Name:

* NRIC:

Passport No:

* Date of Birth:

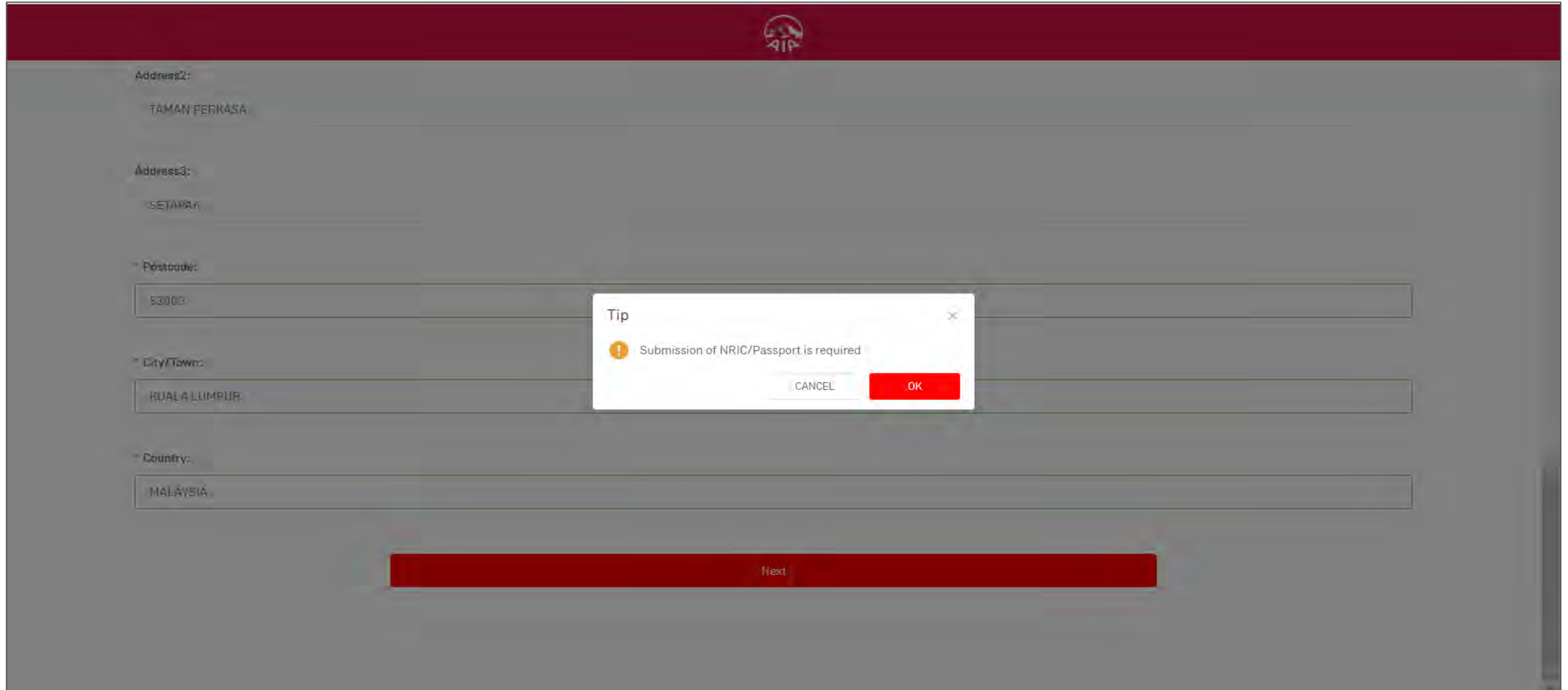
2 Customer Due Diligence info

Name
NRIC No. (For Malaysian citizen only)
Date of Birth
Gender
Passport No. (For Non-Malaysian citizen only)
Nationality
Name of Employer
Nature of Business
Occupation
Mobile No.
E-mail Address
Correspondence Address

1. By default, Customer Due Diligence info for Policy Owner will be displayed. (Note: If Policy Owner and Payor is different person, Customer Due Diligence info for Payor will be displayed in the next page)
2. Agent to verify Customer Due Diligence info for Policy Owner. (Note: Update if required)
3. Click "Next"



Alert Message – If NRIC/Passport is required



The screenshot shows a web form with the following fields:

- Address2: TAMAN PERKASA
- Address3: SETAPAN
- Postcode: 53000
- City/Town: KUALA LUMPUR
- Country: MALAYSIA

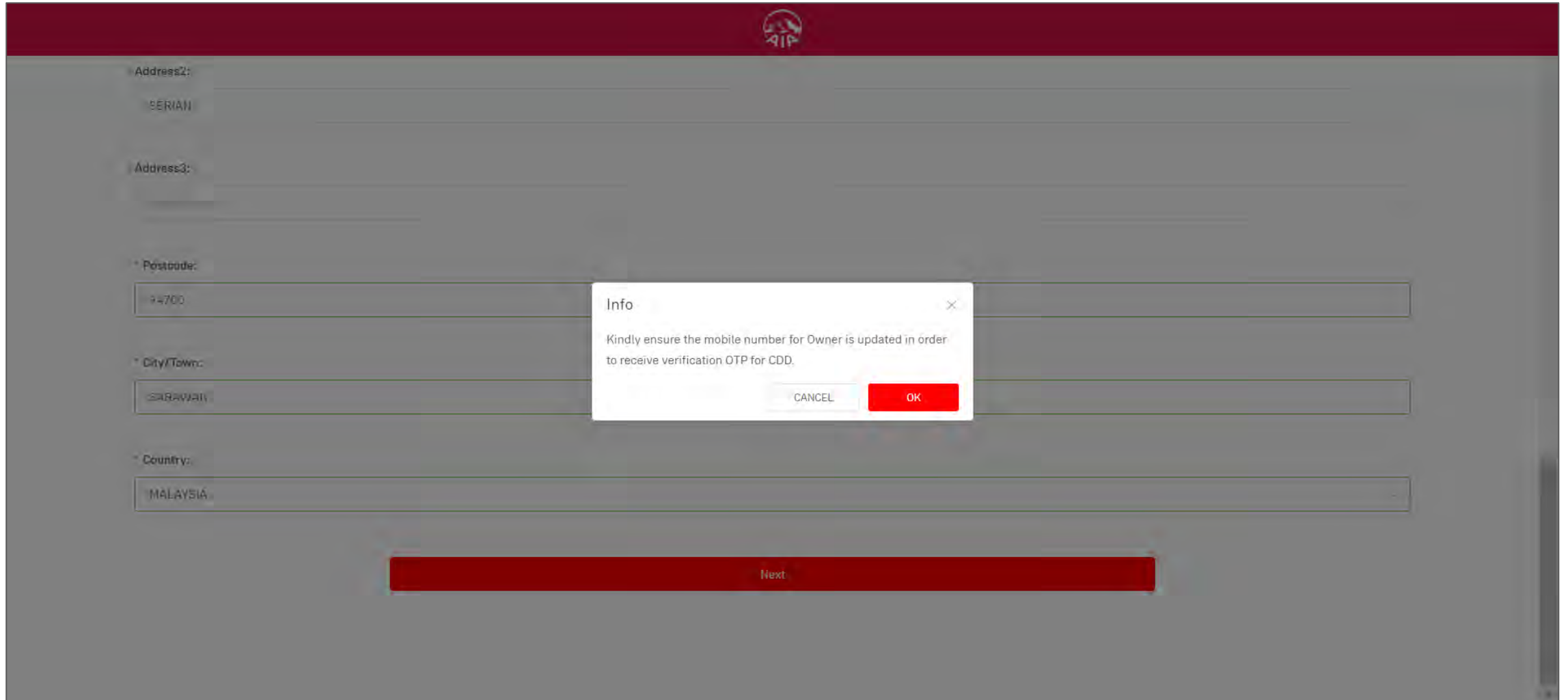
A modal alert message is displayed in the center of the form:

Tip
Submission of NRIC/Passport is required
CANCEL OK

At the bottom of the form, there is a red button labeled "Next".

1. If you updated Name / NRIC No. / Date of Birth / Gender / Passport No / Nationality, the above message will be displayed
2. Click "Ok" to proceed

Alert Message – Mobile Number for OTP



The screenshot shows a web form with the following fields:

- Address2: BERIAN
- Address3:
- Postcode: 94700
- City/Town: SARAWAK
- Country: MALAYSIA

An "Info" dialog box is overlaid on the form, containing the text: "Kindly ensure the mobile number for Owner is updated in order to receive verification OTP for CDD." Below the text are two buttons: "CANCEL" and "OK".

At the bottom of the form, there is a red "Next" button.

1. Alert message will be displayed to remind Policy Owner to ensure the mobile no. displayed is the latest mobile no. in order to receive OTP.
2. Click "Ok" to proceed OR click "Cancel" to remain at CDD page to reconfirm the Mobile Number.
(Note: Update Mobile Number if required)

OTP Authentication

OTP Authentication

Policy Owner: YG

Mobile No: 60129546030

Previous Mobile No: 60163239143

Resend 0:49

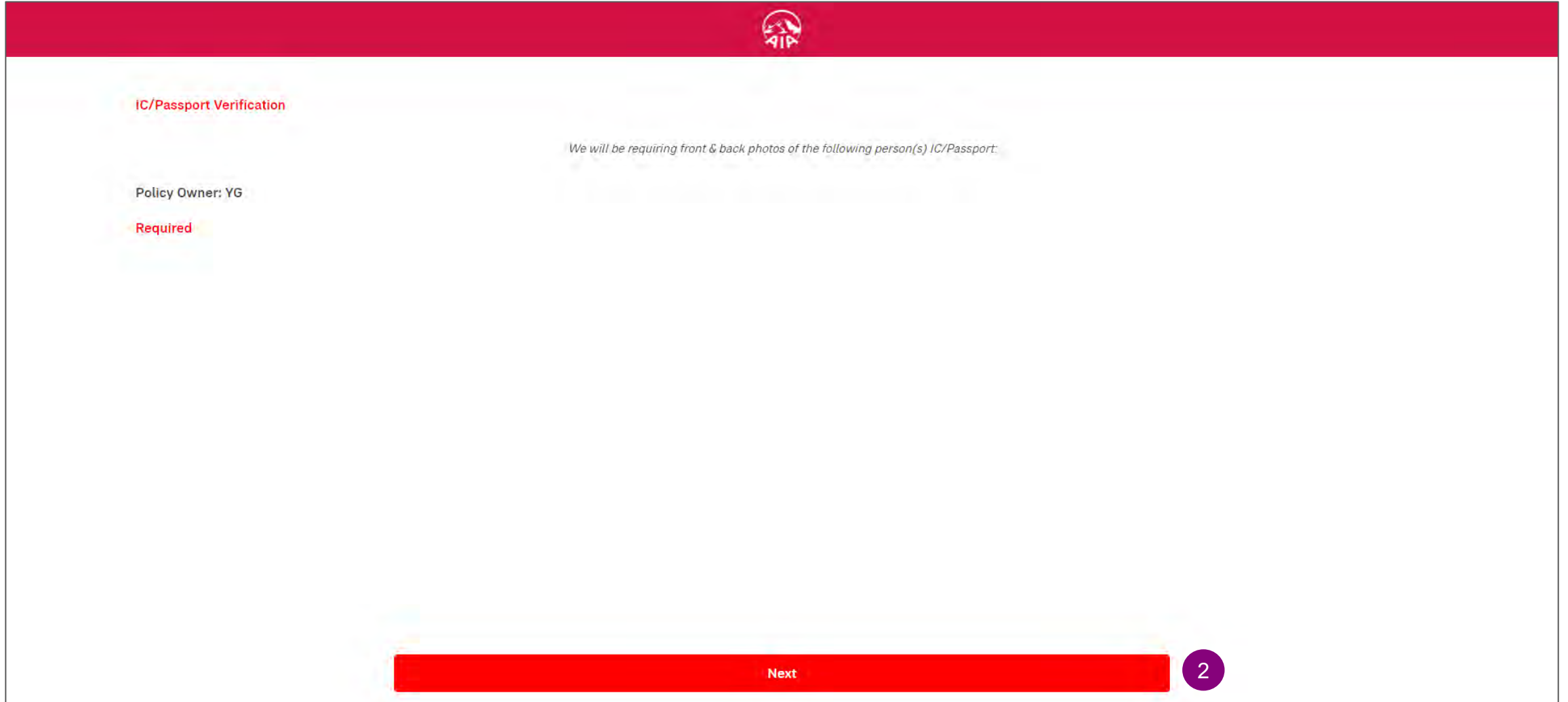
Sample SMS

RMO AIA: Your Customer Due Diligence verification code is:<139456>. Please call our Careline at 1300 88 1899/8922 if you did not perform this request.

Next

1. OTP will be sent to Policy Owner's Mobile Number
(Note: If Mobile Number updated, OTP will be sent to both Old and New Mobile Number)
2. Click "Resend" if Policy Owner did not receive the OTP
3. Click "Next"

Notification – NRIC / Passport required

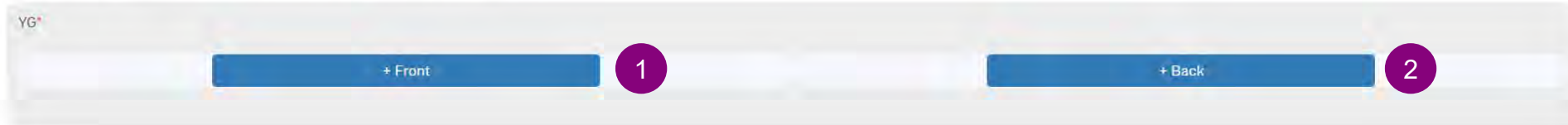


1. System will indicate if Policy Owner / Payor is required to provide their NRIC / Passport (Note: NRIC / Passport can only be submitted via iPad via take picture function.)
2. Click "Next".

Take Picture of NRIC / Passport



Photos of Owner's NRIC/Passport (front & back) will be required to proceed.



Face must be visible, and photo taken must be clear

Note:

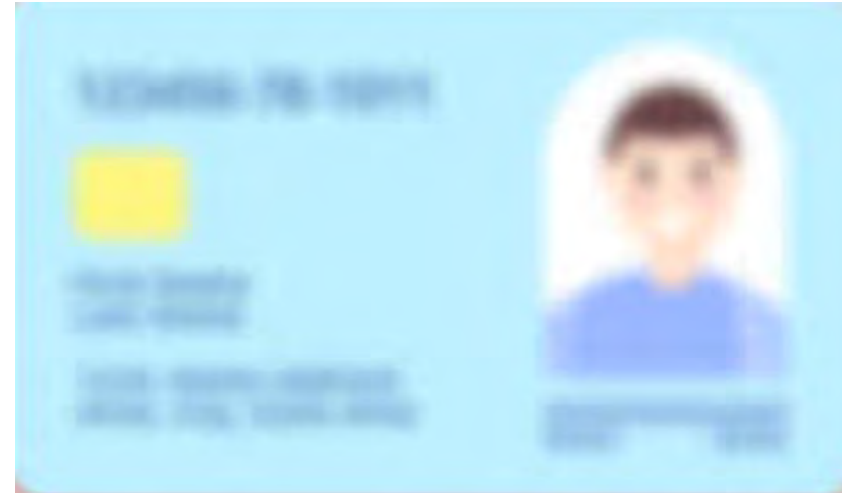
Photo taken for NRIC / Passport must be clear and the face must be visible.



1. Click "Front" to take picture for front page of NRIC / Passport
2. Click "Back" to take picture for back page of NRIC / Passport
3. Click "Next"



Sample NRIC / Passport image allowed



NRIC / Passport Review Page



Photos of Owner's NRIC/Passport (front & back) will be required to proceed.

YG*

+ Front + Back

File size : 10.74KB

File size : 10.74KB

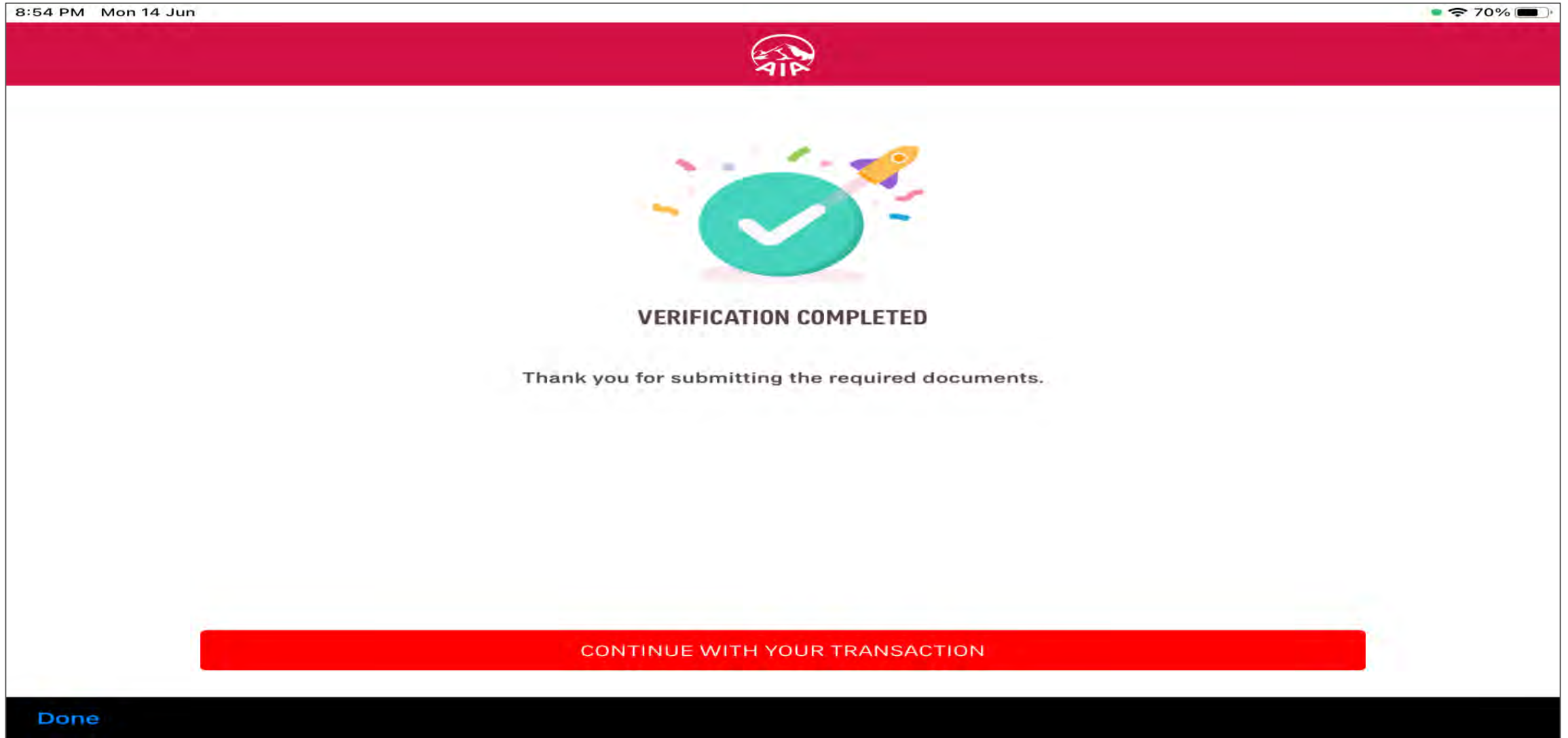
Next

Face must be visible, and photo taken must be clear

1. Click "Delete" if the front page of NRIC / Passport is not clear and retake the photo.
2. Click "Delete" if the back page of NRIC / Passport is not clear and retake the photo.
3. Click "Next"



Customer Due Diligence (CDD) verification completed



1. CDD verification is completed, click "Continue with your transaction"

Continue with Servicing Request Transaction

5:57 PM Fri 11 Jun 90%

< POLICY OVERVIEW UPDATE CONTACT DETAILS ENG BM LOGOUT

1 2 3 4

ENTER YOUR DETAILS

Address (Line 1)	Post Code
<input type="text" value="NO 56"/>	<input type="text" value="50400"/>
Address (Line 2)	State
<input type="text" value="JALAN AMPANG"/>	<input type="text" value="KUALA LUMPUR"/>
Address (Line 3)	Country
<input type="text"/>	<input type="text" value="MALAYSIA"/>

Note:
Please note that upon clicking Next, the Email and mobile number shown above will be applied to all the policies that belongs to you as a policy owner.

NEXT

1. Continue your selected transaction (eg: Update Contact Details / Change Payment Cycle / Update Credit Card Cancel Auto Debit / Update Direct Credit Instruction / Scheduled Top Up)

Continue with Servicing Request Transaction

6:03 PM Fri 11 Jun 89%

[← POLICY OVERVIEW](#) **UPDATE CONTACT DETAILS** [ENG](#) [BM](#) [LOGOUT](#)

VERIFICATION

Taxpayer Identification No. (TIN) N/A	FATCA exemption reporting code N/A	Date of Birth * N/A
Permanent Residence Address N/A	Mailing Address N/A	Reference No. (Optional) N/A

Please press on REQUEST OTP to retrieve OTP number. OTP will be sent to 0129XXX030
Enter the code below to proceed.

I have read and agree to the [Terms and Conditions](#).


1. Click "Request OTP"
2. Key in 6 Digit OTP and tick "I have read and agree to the Terms and Conditions" checkbox.
3. Click "Confirm"



Transaction Completed

6:04 PM Fri 11 Jun 89%

UPDATE CONTACT DETAILS ENG BM LOGOUT


CONFIRMATION


Status: Transaction Completed
A confirmation email has been sent to your personal mail box.

NEW CONTACT DETAILS

Address NO 56 JALAN AMPANG KAMPUNG 50400, KUALA LUMPUR, MALAYSIA	Email	Mobile No.
	Home No.	Office No. 60 0000000

THIS UPDATE WILL APPLY FOR THE FOLLOWING:

- **A-LifeLink 2, 7033769A, SUTILA**



BACK TO DASHBOARD

1. Transaction Completed

