

# ONEANSWER SUPPORT STAFF ACCESS

## HOW TO GUIDE

### Greater support staff access in Account Access

Your support staff now have the ability to establish online OneAnswer Frontier new business forms, and online switch forms, in preparation for your review and submission. This removes the need for you to get involved in time-consuming paperwork preparation.

Greater access for support staff will:

- Enable you to focus on servicing your clients
- Improve efficiency by enabling your support staff to set-up online transactions for your review and submission
- Improve the quality of online form submissions due to enhanced checking processes
- Increase practice workflow

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This handy guide outlines what has changed for support staff and answers some key questions. There will be no changes to what advisers see in Account Access.

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#### Support staff ('users') include:

- Adviser support staff
- Manager support staff – where a 'Manager' is defined as a person who oversees a group of advisers (e.g. Relationship Manager, Office Manager or Practice Manager)
- Dealer group support staff

#### Which online forms are users able to establish?

All users attached to an adviser's/planner's Account Access user ID will be able to establish and edit online OneAnswer Frontier new business forms, and online switch forms (**Note:** This does not include switch forms for ANZ OneAnswer).

#### Once an individual user begins a transaction, are they the only user who can access it?

No, any user linked to an adviser/planner can open and update the form. The form will be locked once open, so that only one user can access a form at the one time.

- **Example 1:** User 1 establishes and saves a form. The Adviser requests further changes to form. User 2 can open the saved form established by user 1 and update and save the form.
- **Example 2:** Adviser establishes and saves a form. User 1 makes further changes to the form. User 2 makes further changes to the form.

#### Are users able to submit the forms?

No, the submit button will be disabled (note: it will still be visible, but does not function). Only advisers have the authority to submit online forms.

#### What do users need to do to activate the new functionality?

There's nothing for users to do. The new functionality has been activated automatically for eligible users and available for use on logging in to Account Access.

## How to establish an online OneAnswer Frontier new business form

1. Log in to Account Access
2. Select 'Apply online' page

OnePath

Quick Search:

Welcome Test Adviser Support Staff A Account access  
Last logged on 10 Jul 2018, 14:42

Home Search Transact online Upload documents Reports In progress Notifications OneView Life Tools Help ? Close window

**Apply online** Online training

Please select the product and sales account for the new application

Platform: OnePath OneAnswer

Product: OneAnswer Frontier Investment Portfolio

Advisers: Please select

OnePath Sales account: Please select

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3. Select the appropriate attached adviser from the 'Advisers' drop down option

OnePath

Quick Search:

Welcome Test Adviser Support Staff A Account access  
Last logged on 10 Jul 2018, 14:42

Home Search Transact online Upload documents Reports In progress Notifications OneView Life Tools Help ? Close window

**Apply online** Online training

Please select the product and sales account for the new application

Platform: OnePath OneAnswer

Product: OneAnswer Frontier Investment Portfolio

Advisers: John Wicks, Test adviser

OnePath Sales account: Please select

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4. Select the appropriate code from the 'OnePath Sales account' dropdown list

OnePath

Quick Search:

Welcome Test Adviser Support Staff A Account access  
Last logged on 10 Jul 2018, 14:42

Home Search Transact online Upload documents Reports In progress Notifications OneView Life Tools Help ? Close window

**Apply online** Online training

Please select the product and sales account for the new application

Platform: OnePath OneAnswer

Product: OneAnswer Frontier Investment Portfolio

Advisers: test adviser

OnePath Sales account: 2021871 - K MCDOWETT FOMELY TRUST, 2050888 - K MCDOWETT FOMELY TRUST, 2050886 - K MCDOWETT FOMELY TRUST, 2079431 - K MCDOWETT FOMELY TRUST, 2073432 - K MCDOWETT FOMELY TRUST, 31331 - K MCDOWETT FOMELY TRUST

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5. Launch the online new business form
6. Online new business forms can be completed as normal up to the 'Review and submit' page
7. Adviser completes the transaction by reviewing and submitting the form or requests changes to be made by user

## How to establish an online switch form

1. Log in to Account Access
2. Search for the client
3. Select 'Transaction options' page

The screenshot shows the OnePath Account Access interface. At the top, there is a 'Quick Search' bar with the placeholder text 'Enter client surname or business name' and a 'GO' button. Below this is a navigation bar with links: Home, Search, Transact online, Upload documents, Reports, In progress, Notifications, OneView Life, and Tools. The 'Transact online' link is highlighted. The main content area is titled 'Transaction options' and includes a 'Print page', 'Online transaction', and 'Return to Account details' section. Below this, there is a form with a dropdown menu for 'OneAnswer Frontier Investment Portfolio, Policy No.' and a 'Transaction options' dropdown. The 'Adviser' dropdown is currently set to 'Please select'. A 'Switch' button is visible below the form. At the bottom, there is a footer with links for 'Financial Services Guide', 'Privacy policy', and 'Important notice', and a copyright notice for '© 2018 OnePath Limited'.

4. Select the appropriate attached adviser from the 'Adviser' drop down option
5. Click on 'Switch' link

This screenshot shows the same OnePath Account Access interface as the previous one, but with the 'Adviser' dropdown menu open. The dropdown list shows 'John Wicks' as the selected adviser. The 'Switch' button is now circled in red. The rest of the interface, including the navigation bar and footer, remains the same.

6. Online switch forms can be completed as normal up to the 'Review and submit' page
7. Adviser completes the transaction by reviewing and submitting the form or requests changes to be made by user

## Accessing saved transactions

1. Log in to Account Access
2. Select 'Transact online > Saved Transactions' page
3. Users will be able to see New Business and Switch forms for all advisers they are attached to in the 'saved transactions' section. Users can sort/filter the list of transactions by any column

4. Select the desired transaction by clicking on appropriate client name in first column

OnePath

Quick Search:  GO

Account access  
Last logged in: 26 Jul 2018, 19:35  
Help ? Close window

Welcome Test Adviser Support Staff A

Home Search Transact online Upload documents Reports In progress Notifications OneView Life Tools

**Saved transactions**  
2 result(s) found  
The maximum number of search results that can be displayed is 500.

Name of customer	Policy number	Product	Type	Date transaction saved	Reference number	Adviser name	Support staff name
John Person	000012563	OneAnswer Investment Portfolio	Switch	17 Jul 2018, 16:11:00	R15776	Test AdviserADVSS	Test Adviser Support Staff A
Corcoran Toloso	New	OneAnswer Frontier Pension	Application	17 Jul 2018, 14:34:00	R15768	Test AdviserADVSS	Test Adviser Support Staff A

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**Submitted transactions**  
28 result(s) found  
The maximum number of search results that can be displayed is 500.

Name of customer	Policy number	Product	Type	Status	Date transaction submitted	Reference number	Adviser name	Form
Ric Hair	New	OneAnswer Frontier Pension TTR	Application	In progress	27 Jul 2018, 12:11:00	R15909	asdf asdf	View
Yonnie Halmetson	New	OneAnswer Frontier Personal Super	Application	In progress	27 Jul 2018, 11:43:00	R15908	asdf asdf	View
Bruder Andy	New	OneAnswer Frontier Pension	Application	In progress	27 Jul 2018, 11:29:00	R15905	asdf asdf	View
Frank Zappo	New	OneAnswer Frontier Investment Portfolio	Application	In progress	27 Jul 2018, 10:58:00	R15904	asdf asdf	View
John Smith	00326555	OneAnswer Personal Super	Switch	In progress	19 Jul 2018, 15:18:00	R15909	asdf asdf	View
Jenny Jones	021588874	OneAnswer Personal Super	Switch	In progress	17 Jul 2018, 16:40:00	R15773	asdf asdf	View
Michael Jackson	0025699858	OneAnswer Personal Super	Switch	In progress	17 Jul 2018, 16:13:00	R15721	Test AdviserADVSS	View
Ngilo Xante	New	OneAnswer Frontier Investment Portfolio	Application	In progress	17 Jul 2018, 10:14:00	R15762	Test AdviserADVSS	View
CHARLES ADAMS	0000155888	OneAnswer Personal Super	Switch	In progress	16 Jul 2018, 13:47:00	R15743	asdf asdf	View
JOANNE ABRAHAM	000558874455	OneAnswer Personal Super	Switch	In progress	13 Jul 2018, 14:29:00	R15727	asdf asdf	View
Mary White	12345698	OneAnswer Frontier Investment Portfolio	Change of details	In progress	13 Jul 2018, 13:30:00	R15725	Test Adviser	View
Michelle Green	23655887	OneAnswer Personal Super //Select	Switch	In progress	05 Jul 2018, 10:43:00	R15500	Test AdviserADVSS	View
Ant Man	25407444	OneAnswer Personal Super //Select	Switch	In progress	03 Jul 2018, 15:53:00	R15438	Test AdviserADVSS	View
Captain America	123456789	OneAnswer Pension	Switch	In progress	03 Jul 2018, 11:03:00	R15427	Test AdviserADVSS	View
Test Company	659855577	OneAnswer Investment Portfolio	Switch	In progress	03 Jul 2018, 10:09:00	R15425	Test AdviserADVSS	View
The Rock	1284128412	OneAnswer Frontier Personal Super	Withdrawal	In progress	02 Jul 2018, 12:10:00	R15393	Test Adviser	View
Tim Cahill	12121212	OneAnswer Frontier Personal Super	Additional investment	In progress	02 Jul 2018, 11:56:00	R15392	Test Adviser	View
Rak Varasapen	New	OneAnswer Frontier Personal Super	Application	In progress	02 Jul 2018, 10:17:00	R15362	Test Adviser	View
Tim Cahill	12345664321	OneAnswer Frontier Investment Portfolio	Withdrawal	In progress	02 Jul 2018, 10:11:00	R15381	Test Adviser	View
Scott Brown	63326353	OneAnswer Frontier Pension	Withdrawal	In progress	02 Jul 2018, 10:00:00	R15380	Test Adviser	View
Kylie Smith	95696556	OneAnswer Frontier Personal Super	Switch	In progress	02 Jul 2018, 09:47:00	R15377	Test AdviserADVSS	View
Sebastian Vettel	New	OneAnswer Frontier Pension	Application	In progress	29 Jun 2018, 16:14:00	R15354	Test Adviser	View
Pauline Jones	789789887	OneAnswer Frontier Investment Portfolio	Switch	In progress	22 Jun 2018, 16:07:00	R15279	sdg sdfg	View
Jerry Tomaso	654654654	OneAnswer Frontier Investment Portfolio	Withdrawal	In progress	22 Jun 2018, 11:47:00	R15285	Test Adviser	View
Jane Orange	365265214	OneAnswer Frontier Investment Portfolio	Additional investment	In progress	22 Jun 2018, 11:41:00	R15283	Test Adviser	View
Joe Peresh	32656521	OneAnswer Frontier Investment Portfolio	Adviser Service Fee Maintenance	In progress	22 Jun 2018, 11:24:00	R15278	Test Adviser	View
Eric Johnson	23123635214	OneAnswer Frontier Investment Portfolio	Withdrawal	In progress	22 Jun 2018, 10:55:00	R15277	Test Adviser	View
		OneAnswer Investment Portfolio	Switch	In progress	01 Jun 2018, 11:40:00	R15206	Test Adviser	View

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What will a user see if they do not have the correct permissions to establish new business applications?

If the user doesn't have the correct permissions, the following error message will appear on the page: *You are not authorised to use the Transact online service.*

OnePath

Account access  
Welcome Test Dealer  
Last logged in: 25 Jul 2018, 12:14  
Help ? Close window

Home Search Transact online Upload documents Reports In progress OneView Life Tools

**Error**

Please [click here](#) and attempt to re-access your required page.

If you continue to have difficulties please click on the 'Contact us' link for further assistance and contact details.

Please note the following time and error message to assist us in diagnosing the problem:

11:05:35, Monday 30 July 2018  
You are not authorised to use the Transact online service.

We apologise for any inconvenience this may have caused.

## How can an adviser set up and attach new users?

To take advantage of the new access, advisers must have support staff registered and linked to their Account Access user ID.

1. Log in to Adviser Advantage
2. Select 'My preferences' from the left-hand menu and then 'Manage staff access'

The screenshot shows the OnePath Adviser Advantage interface. The left-hand menu is expanded, showing various options. The 'My preferences' option is selected, and the 'Manage Staff Access' link is circled in red. The main content area displays the 'My preferences' page, which includes sections for 'Change your password', 'Change email address', 'Data Feed Registration', and 'Subscriptions'. The 'Subscriptions' section contains a table with columns for 'Topic/Information' and 'Subscribe', listing various communication preferences.

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Adviser > Adviser Advantage > My preferences

### My preferences

[Change your password](#)  
For security purposes we recommend you change your password on a regular basis.

[Change email address](#)  
Change or view your current email address.

[Data Feed Registration](#)  
Register for data feeds to external financial planning software providers.

[Manage Staff Access](#)

### Subscriptions

Please indicate which information you would like to receive by email from OnePath.

Topic/Information	Subscribe
OnePath Adviser News & Adviser Communications	<input checked="" type="radio"/> Yes <input type="radio"/> No
Life/Risk Insurance Communications including Life Matters newsletter	<input checked="" type="radio"/> Yes <input type="radio"/> No
Invitation to adviser roadshows	<input checked="" type="radio"/> Yes <input type="radio"/> No

Please note in some circumstances we may send you business critical information in a format different to the one requested.

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3. Click on the 'My Profile' tab
4. Click on 'Add support'

**OnePath** Close window

### Manage staff access

**My Groups**  
Adviser

**Adviser**  
Welcome **My Profile**

**My profile**  
User ID  
Role  
Gender  
Date of birth  
Email  
Phone  
Name

**My support people**  
Add View Edit Delete Search:  
Surname First name Email Role Status  
No support people to display

**Manage**  
Add support  
View support  
Edit support  
Delete support

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5. Enter the Support Staff's details into the fields provided and then click 'Submit'. A temporary password will be sent to the Support Staff.

The screenshot shows the OnePath 'Manage staff access' interface. On the left, there's a 'My Groups' section with 'Adviser' listed. Below it is a 'Manage' section with options: 'Add support', 'View support', 'Edit support', and 'Delete support'. The main area is titled 'Manage staff access' and has a 'Close window' button in the top right. Below the title bar, there's a 'Welcome' button and a 'My Profile' button. The 'My profile' section contains fields for User ID, Role, Gender, Date of birth, Email, Phone, and Name. A modal dialog box titled 'Add support' is open in the foreground. It contains the following fields: User ID (set to '[auto]'), Title (a dropdown menu showing 'Please select'), First name (text input), Surname (text input), Gender (a dropdown menu showing 'Please select'), Date of birth (text input with a calendar icon), Phone (text input), Email (text input), Role (set to '[auto]'), and Status (a dropdown menu showing '[auto]'). At the bottom of the dialog, there are 'Submit' and 'Cancel' buttons. The 'Submit' button is circled in red. In the background, there's a 'Status' section with the text 'No support people to display'.

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For more information, speak with your business development manager  
or for training please email [advisertraining@onepath.com.au](mailto:advisertraining@onepath.com.au)

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The information is current as at February 2020 but may be subject to change. Updated information will be available by contacting your Business Development Manager. OneAnswer Frontier Personal Super, OneAnswer Personal Super and ANZ OneAnswer Personal Super are issued by OnePath Custodians Pty Limited (OnePath Custodians) ABN 12 008 508 496, AFSL 238346. OneAnswer Investment Portfolio is issued by OnePath Funds Management Limited (OnePath Funds Management) ABN 21 003 002 800, AFSL 238342. An investment is subject to investment risk, including possible delays in the repayment of principal and loss of income or principal invested. The information provided is for the use of advisers only, and is not to be given to potential or existing investors. Full product information including fees, charges, terms and conditions is available in the relevant Product Disclosure Statement available by calling 133 665 or visiting [onepath.com.au](http://onepath.com.au). Although, Australia and New Zealand Banking Group Limited (ANZ) ABN 11 005 357 522 distribute some of these products, ANZ does not guarantee or stand behind OnePath Custodians or OnePath Funds Management or their products.