# 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

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.

#### 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.

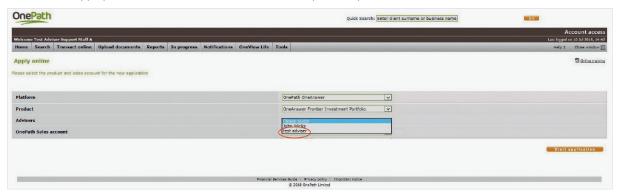


## How to establish an online OneAnswer Frontier new business form

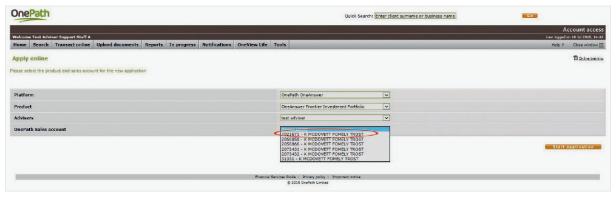
- 1. Log in to Account Access
- 2. Select 'Apply online' page



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



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



- 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



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



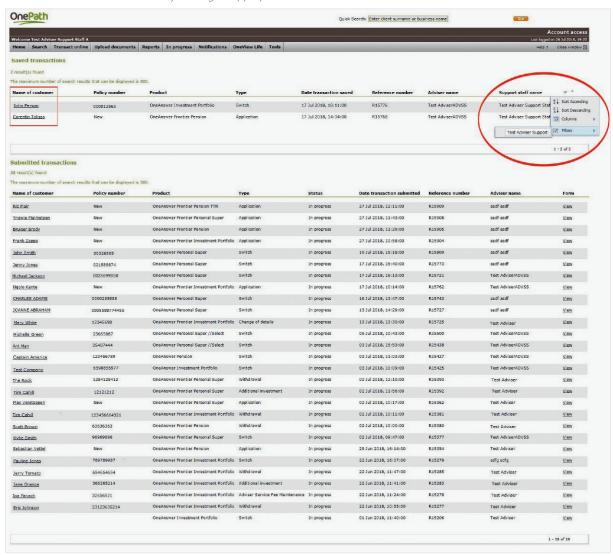
- 6. Online switch forms can be completed as normal up to the 'Review and submit' page
- 7. Adviser completes the transaction by reviewing and submitting the form or requests changes to be made by user

## **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.

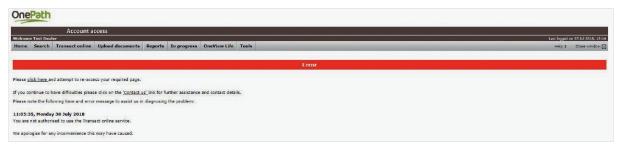
  Users can sort/filter the list of transactions by any column

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



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

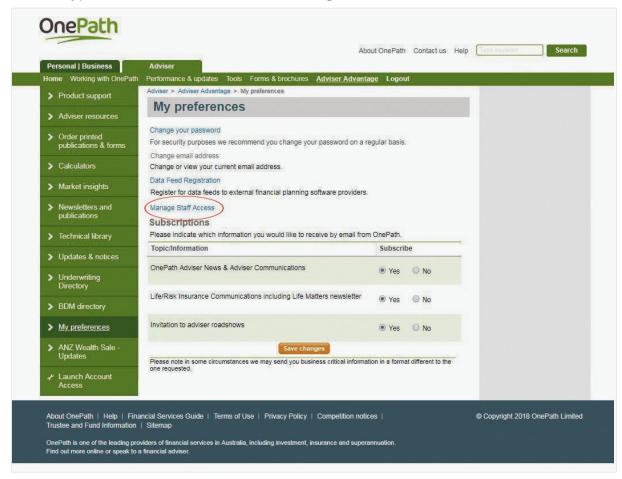
If the user doesn't have the correct permissions, the following error message will appear on the page: You are not authorised to use the Transact online service.



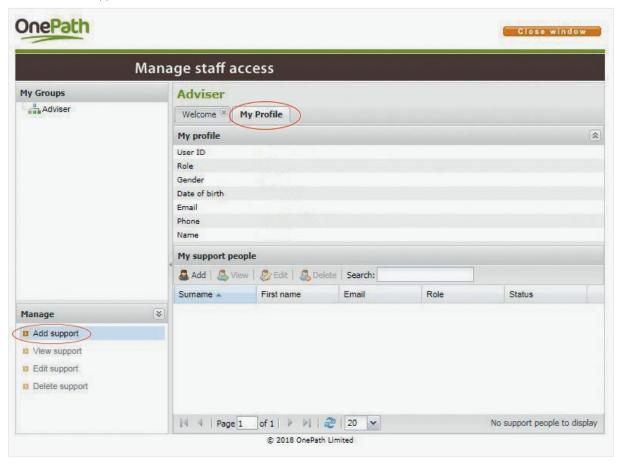
#### How can an adviser set up and attach new users?

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

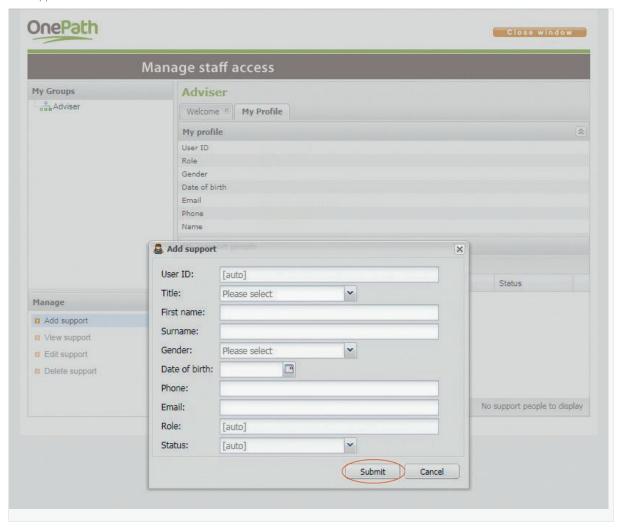
- 1. Log in to Adviser Advantage
- 2. Select 'My preferences' from the left-hand menu and then 'Manage staff access'



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



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.



For more information, speak with your business development manager or for training please email advisertraining@onepath.com.au

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.

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