

FASTER ONLINE NEW BUSINESS APPLICATIONS

As part of our commitment to powering you through OneAnswer, we're reducing the time you spend on paperwork by enabling you to securely upload any outstanding documents produced during the online new business application process.

With OneAnswer Frontier's new document upload functionality, you can:

- Substantially improve the turnaround time to fully complete the new business process
- Reduce your mailing costs


- Improve efficiency when establishing OneAnswer Frontier new business
- Reduce the risks associated with handling paper forms.

Over time, this solution will be further developed to include the upload of forms for other online processes, so stay tuned.

[Read this handy 'How to' guide to see how it's done](#)

1 Complete and submit a OneAnswer Frontier online new business application following the existing process. If you have any or all outstanding documents saved on your PC as PDFs and ready to upload, you can commence the document upload process. Simply click on the **Upload scanned 'Outstanding Forms'** link at the bottom of the **You're done** page.

If you'd like assistance with online applications, view our helpful step-by-step video in the 'Product support' area of Adviser Advantage.



OneAnswer Frontier Personal Super Application

1. Applicant details	2. Contribution details	3. Investment details	4. Insurance details	5. ASF/Adviser details	6. Review & Submit	You're done
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Your request has been submitted

Your request has been successfully submitted to OnePath.

Reference Number: R13568

Please quote the above Reference Number in all future communications regarding this request.

Completed Forms

<input type="checkbox"/>	Super Application	Download PDF
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Outstanding Forms

<input type="checkbox"/>	Client Signature & Declaration Form	Download PDF
<input type="checkbox"/>	Superannuation Transfer Form	Download PDF

[Print All](#) [Print Selected](#)

[Upload scanned 'Outstanding Forms'](#)

- Alternatively, when you have an outstanding document ready for submission, log in to Account Access and select the **Upload documents** menu item from the main menu bar.

You don't need to wait until you have all of the signed outstanding documents – they can be submitted individually as soon as you have them ready.

The screenshot shows the OnePath Account Access interface. At the top, there is a 'Quick Search' field with the placeholder text 'Enter client surname or business name' and a 'Go' button. Below this is a navigation bar with the following items: Home, Search, Transact online, Upload documents (highlighted in red), Reports, Data feeds, In progress, Notifications, OneView Life, and Tools. The main content area is titled 'Search for a client' and includes a 'More search options' link. There are three input fields: 'Client surname or business name', 'Policy number', and 'Employer Fund name'. A 'Search' button is located to the right of the 'Employer Fund name' field. To the right of the search fields is a 'Help?' section with links for 'Online training' and 'View User guide'. Below the search fields is an 'Account access news' section with a message about contacting the Account Access team. At the bottom right, there is a 'Last 5 reports completed' section with a table header: Report, Date, Time.

- Enter the online application reference number (located in the top right corner of the documents you wish to upload) in the **Existing Reference Number** field and select the relevant product from the **Product** drop-down menu.

Note: an error message will display if the reference number you enter does not exist.

The screenshot shows the OnePath Account Access interface with the 'Upload documents' section active. At the top, there is a 'Quick Search' field with the placeholder text 'Enter client surname or business name' and a 'Go' button. Below this is a navigation bar with the following items: Home, Search, Transact online, Upload documents (highlighted in red), Reports, Data feeds, In progress, Notifications, OneView Life, and Tools. The main content area is titled 'Upload documents' and includes instructions: 'Upload outstanding OneAnswer New Business documents to OnePath. Please note that only outstanding documents for New Business applications that have been submitted **online** are accepted. Each upload can only be for one New Business application. If you have multiple applications that you wish to upload documents for please upload them separately. Fields marked with an * are mandatory'. There are four input fields: 'Existing Reference Number *' (with value R12393), 'Process' (with value New Business), 'Product *' (with a dropdown menu showing 'Please select', 'OneAnswer Frontier Investment Portfolio', 'OneAnswer Frontier Pension', and 'OneAnswer Frontier Personal Super'), and 'Document type *'. There are three buttons: 'Attach', '+ Add another row', and 'Upload'. At the bottom, there is a footer with links for 'Financial Services Guide', 'Privacy policy', and 'Important notice', and a copyright notice '© 2017 OnePath Limited'.

4 Select the document type from the drop-down menu and attach the relevant file from your PC. The **Document type** menu will be specific to the Product you have selected.

- a) Select the document type from the drop-down menu
- b) Locate the scanned document on your PC
- c) Click the 'attach' button.

This step can be repeated multiple times depending on how many documents you wish to upload for the individual online application by selecting **Add another row**. You are able to remove attachments and/or entire rows if you require.

Note: error messages will display if any fields are outstanding.


The screenshot shows the OnePath 'Upload documents' interface. At the top, there is a search bar and a 'Go' button. Below that is a navigation menu with options like Home, Search, Transact online, Upload documents, Reports, Data feeds, In progress, Notifications, OneView Life, and Tools. The main heading is 'Upload documents'. Below this, there is a message: 'Upload outstanding OneAnswer New Business documents to OnePath. Please note that only outstanding documents for New Business applications that have been submitted online are accepted. Each upload can only be for one New Business application. If you have multiple applications that you wish to upload documents for please upload them separately. Fields marked with an * are mandatory'. The form contains four rows: 'Existing Reference Number *' with value 'R12393', 'Process' with value 'New Business', 'Product *' with value 'OneAnswer Frontier Pension', and 'Document type *' with a dropdown menu open showing options like 'Client signature & declaration form', 'Individual identification form', 'Nomination of beneficiary form', 'Notice of intent to claim a tax deduction', 'Tax File Number declaration', and 'Transfer form'. There are buttons for 'Attach', '+ Add another row', and 'Upload'.


5 When you are ready to submit, click the **Upload** button. This button will only become active after all of the above steps have been completed correctly.

6 You will receive an onscreen confirmation message which includes your reference number.

The screenshot shows the OnePath confirmation message. At the top, there is a search bar and a 'Go' button. Below that is a navigation menu with options like Home, Search, Transact online, Upload documents, Reports, Data feeds, In progress, Notifications, OneView Life, and Tools. The main heading is 'Upload documents'. Below this, there is a message: 'You have successfully uploaded the following documents:'. A list contains one item: 'Client signature & declaration form'. Below the list, it says 'Reference Number: 2157'. Further down, it says 'Please quote the above Reference Number in all future communications regarding this request. A successful upload of document/s does not guarantee the item is final and able to be processed. Additional information may be required and if this is the case we will contact your office.'

For more information about OneAnswer, please feel free to:

 Speak with your OnePath Business Development Manager

 For training, please email advisertraining@onepath.com.au