

## eBenefits User Guide for policyholders

May 2025



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### How to access eBenefits





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#### How to log in to your eBenefits:

Go to <u>www.aia.co.th</u>
 Log in as Corporate Customers
 Log in with your eBenefits username

# How to Request eBenefits Account for policyholders



### How to request eBenefits account for policyholders

#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

Organizations holding AIA group insurance policies can apply for eBenefits account as the steps below:

#### **1. PREPARE DOCUMENT**

- Fill in the application form with authorized signature and corporate seal.
- Prepare a copy of company registration certificate or commercial registration certificate issued within the past 6 months with authorized signature and corporate seal (if registered with corporate seal).

#### 2. SEND EMAIL

- Email Title: "Request for opening eBenefits user account of XXX Company, policy number 0000xxxxxx."
- Email all documents to <u>th.cs.admin@aia.com</u>.
- After submitting request by the email, you will get a reply email from <u>th.eb.services@aia.com</u> informing the details of your eBenefits account together with password within 7-14 business days.
- If the policyholders forgets username and password or wish to change user's information, please follow the same steps as requesting a new account.

Authorized Representatives	and Electronic Services Registration Form	
	like to invite you to register for the authorized representatives to contact with	
	are protected and only authorized representatives will be able to access the	
Organization Name	olicy No	
Address		
1. Name of Autorized Representative		
	send, receive or access to the data regarding group insurance policy	
correspondences, as well as update information of members du	rivilege cards, renewal information, claims reports, announcements and/or uring policy year from AIA.	
Autorized Representative can submit enquiry on updating memb	ber during Policy year via eBenefits.	
	For All sub office Only this sub office*	
	Department	
Email (Capital Letter)		
	I SUD ONCE AND AND SEND AFTOMISTIC MAR.	
<ol> <li>Add/Change Autorized Representative Request for change Authorized representative as follows:</li> </ol>		
Add Remove	Effective on	
	eTelEmail	
Add Remove	e	
	Effective on	
Change from		
3. Register electronic services		-
Authorized representative would like to apply services as follows: Document receive channel (Please choose only one channel)		
<ul> <li>Apply e-document service. To receive documents</li> </ul>	Scan me	
The correspondent document that you will receive such	n – – – – –	
and renewal notice as PDF file format via contact perso Apply to receive document as paper through auth		
Acreement		١
1. I confirm that the person indicated in the form is the com	╡ <b>╸╏╝╏╙┓┸┕<u>┥</u>┓┸╹╏╝╏</b>	
<ol> <li>I certify what has been done by the authorized represental.</li> <li>I will inform Al&amp; immediately if there's any changes of the</li> </ol>		
<ol> <li>I will inform AIA immediately if there's any changes of the 4. In case that AIA cannot deliver e-document via email with</li> </ol>		
as provided above.	A CONTRACTOR AND A C	
<ol> <li>I certify that if there is any breach of the Personal Data personal data, it will be my responsibility and AIA will not</li> </ol>		
personal data, it will be my responsibility and AM will not		
Authorized Representative 1 Authorized Representati	▋▓▖▃▁▝▞▋▛▖▖▌▌▖▀▖▌▖	
Authorized Represen		
Date		
2) For more information, please contact AIA Call Center 1581		
Downly	pad the application form he	
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### How to request eBenefits account for policyholders

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After receiving an email request for eBenefits account, Group Insurance Team will create a user account and send 2 emails for username and password to the customer within 7-14 business days as follows:

#### **1. User ID notification**

Confirmation of User Registration - User ID Notification for company XXXX



Τø

th.eb.services@aia.com

#### 2. Password notification

Confirmation of User Registration - Password Notification for company XXXX



### Learn about eBenefits



### **Explore eBenefits**

Both policy administrators and policyholders can manage information and group insurance members during the policy year regarding the topics below.







## How to View Policy Information





#### eBenefits > Policy

1. After entering eBenefits system, select **Policy**.



eBenefits	S Policy Bills Claims			ไทย	EN Q Log out
ebenent					
Policy					
Policy no. or policy hole	der name		2.	3 Policy status	
Q Input no. or nan	ne at least 4 characters			Active	Terminated
Policy anniversary mor	nth		2.	4	
All months			~		Search
Search result (2)					
Policy no. 🕈	Policy holder name 🖨	Status 🖨	Initial effective <b>♦</b> date	Policy anniversary 🖨 date	Action
	COMPANY XXXX	Active	25 Aug 2022	25 Aug	View Manage

- 2. In **Policy** menu, you will find a Policy Search Tool and Policy List for your searching as follows:
  - 2.1 Search by policy number and policyholder's name.
  - 2.2 Search by policy's anniversary month.
  - 2.3 Search by policy status.
  - 2.4 Click Search after the above setting.

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eBenefits > Polic	cy > Pol	licy inf	ormati	ion	4. eBenef	its Policy	Bills Claims				ไทย EN Q	Log out	)
3. After getting your search	n result clict	k "View" t	n see nolicy	information	<b>〈</b> Back								
o. Antor gotting your oouror			0 000 pono;		4.1 Policy inf	formation			Dow 🕁	vnload eDoc 🛛 🔁 Clair	m report Mar	nage member	
eBenefits Policy Bills Claims			ไทย	EN Q Log out	Policy holder nam	ne	Policy no.		Status <b>Active</b>		Sub office	any 🗸	ר
Policy			Deliaustatus		Initial effective da 25 Aug 2022		Policy anniversary 25 Aug		Membe 9	Benefit information			0000105132
Policy no. or policy holder name           Q         Input no. or name at least 4 characters			Policy status	Terminated	Contact person <u>Show details</u>		AIA contact for po <u>Show details</u>	licy holder		Plan description Benefit YEARLY RENEWABLE TERM LIFE			พนักงามทุกคน Coverage
Policy anniversary month										DEATH BENEFIT			(THB)
All months		~		Search	J	YEARLY RE	NEWABLE			Benefit Amount Min Amount		Unlimite	2,000 ed benefit amount
Search result (2)						Payment mode Annual		Change effectiv 25 Aug 2022	e date	Max Amount			2,000
Policy no. ♦ Policy holder name ♦	Status 🖨	Initial effective 🗘	Policy anniversary 🕈	Action	Plan/bene	efit/premium detai	ls				hall be subject to the terms and condi "Others", please refer to the Policy Co		
COMPANY XXXX	Active	date 25 Aug 2022	3.	View Manage	Plan no.	Plan descripti	ion	Coverage type		Premium rates	Benefit	, Î	
					002	พนักงานทุกคน	1	MEMBER ONLY		Rate Table	Show details		

- 4. On **Policy Information Page**, the following contents will be shown:
  - 4.1 policyholder's information, policy number, policy period, etc.
  - 4.2 List of insurance plans.
  - 4.3 To view coverage details of each plan, click **Show Details**.

#### eBenefits > Policy > Policy information



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	eBenefits Policy	Bills Claims		ໂກຍ EN Q Log out
	< <sub>васк</sub> Member manageme	ent		6.1 Add new member
5.2	Policy holder name COMPANY XXXX	Policy no.	Sub office	~
	Enquire/Edit Membe	r Bulk add/E	Edit member	Download member
5.3	As of 9 May 2025	Select V	Search member	/emplayee no.
	Status           Active         Terminated	Member type	Child 🗌 Parent	Search
	Total 9 members			
5.4	Cert no. 🛊 Employee no	b. ♦ Name ♦	Member type 븆 🦷 Status 븆	Action
			Employee Active	Edit Terminate

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SOLUTIONS

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Click Manage member to edit or manage policy members. The system will take you to Member management page which consists of the following menus:

- 6.1 Click Add new member to add policy members.
- 6.2 Menu bar.
- 6.3 Member search filter.
- 6.4 List of policy members.

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#### eBenefits > Policy > Policy information > Member management



#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

#### eBenefits > Policy > Policy information > Member management > Dependent info

Updated date: 14 Aug 2019 09:	56	Ū	] Terminate 🛛 🗹 Edit	8.	Dependent info Updated date: 29 May 2018 22:08		
Policy holder name	Policy no.	Sub office			Policy holder name	Policy no.	Sub office
MPANY XXXX					COMPANY XXXX Certificate no.	Membership ID	
Certificate no. 080	Membership ID				Certificate no.	Membership ID	
Title N/A	First name	Surname			Title N/A	First name	Surname
					Date of birth	Gender	Marital status
Date of birth	Gender	Marital status			27 Mar 2008	Female	Single
0 Mar 1964	Male	Divorce			Nationality Thai	National/passport ID N/A	
Nationality <b>Thai</b>	National/passport ID <b>N/A</b>	Mobile phone no. N/A	Email N/A		Under Member	Plan	Relationship
nk name	Bank account no.					005 - DEPENDENT OF PLAN 4	Child
N Normal New York Ne	N/A						
loyment date 2010	Plan <b>A01 - A01</b>	Initial effective date 20 Dec 2011		8	.3 CLINICAL		
Employee no.	Department	Job position	Salary (can't show info)		Plan no. 005	Change effective date 20 Dec 2011	Status Active
	N/A	N/A	•		HOSPITAL AND	SURGICAL WITH NON-SURGICAL	
					Plan no.	Change effective date	Status
					005	20 Dec 2011	Active
Dependent							
Dependent Name		Relationship	-	_			
		<b>Relationship</b> Child					
<b>⊕</b>		· · · · · · · · · · · · · · · · · · ·		8. If t	he employer ext	ends coverage to	emplo
5		· · · · · · · · · · · · · · · · · · ·			1 2	-	
Name	EWABLE TERM LIFE	· · · · · · · · · · · · · · · · · · ·			he employer ext I be displayed or	-	

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8.2 🗊 Terminate ピ Edit Show details Show details

loyee's family, information of family members ion Page as well.

indicate last updated date).

8.2 Click to Terminate or Edit Member's Information.

8.3 Details of dependents' coverage.

## eMember Movement



### eMember Movement during the policy year

#### eBenefits > Policy

During the policy year, you can **edit members' information** or **report employees' entry and exit** via eBenefits on your own throughout the policy year as follows:



				EN Q Log out
ne			Policy status	
ast 4 characters			Active	Terminated
		~		Search
íicy holder name 💲	Status 🖨	Initial effective <b>♦</b> date	Policy anniversary \$ date	Action
COMPANY XXXX	Active	25 Aug 2022	25 Aug	3. <sub>View</sub> Manage
	me east 4 characters	east 4 characters	east 4 characters          Ilicy holder name \$       Status \$       Initial effective \$         date       Initial	east 4 characters

- 1. Enter eBenefits and select **Policy**
- 2. Search the desired policy.
- 3. Click Manage on the policy you want to edit.

### eMember Movement during the policy year

#### eBenefits > Policy > Member management

When you click Manage on the desired policy in Policy menu, the system will take you to Member Management Page



Member Management Page consists of the following tools:

- 1. Click Add new member to notify new member's entry into the policy one by one.
- 2. Menu for Adding new multiple members via Excel file.
- 3. Menu for **Downloading list of members.**
- 4. Click Edit to edit current members' information.
- 5. Click Terminate to delete members from the policy.

## Single Addition on eMember Movement



### **Single addition**

#### eBenefits > Policy > Member management > Add new members

	Add nev	w member	Policy no.	1.	Sub	office *
	บริ่งงงานอลที แ	ชอร์วิสเซส จำกัด	00000116	66	10	00 - บริ่งงงงแอลที เซอร์วิสเซส จำกัด
2.						
9	8	Title		First name *		Surname *
		Select	~	First name		Sumame
		Don't show on card		Show on card		Show on card
		Date of birth *		Gender *		Marital status *
		DD/MM/YYYY		Select	~	Select V
		Nationality *		National/passport ID *		
		Select	~ ]	National/passport ID		* is the mandatory field.
		Bank name		Bank account no.		
		Select	~ ]	Bank account no.		
	R	Mobile phone no.		Email		
	9	Mobile phone no.		Email		
	2	Employment date *		Plan *		
		DD/MM/YYYY		Select	~	
				Show on card		
		Employee no. *		Department		Job position Salary
		Employee no.		Select	$\sim$	Job position Salary
	<b>#</b>	Expected effective date	*			
		DD/MM/YYYY			<b>□</b> ]	Choose the expected effective date
		Effective date is subject to underwriting criteria.	waiting period i	in policy contract and AIA's		as the condition of a policy.
3.		and a company and a company				<u></u>
ა. 		Supporting docume File format must be po		<mark>list guide</mark> x, xls, xlsx, jpg, jpeg, png,	, csv (max	x 5 MB/file)
		No document uplo	aded yet			
		+ Add document	ן			

After clicking Add new member, you can add new members to the policy as follows:

- 1. Select branch/subsidiary that you want to add member information.
- 2. Enter the information of the member you want to add and details of accompanied person/s (if the employer extends the coverage).
- 3. Upload application documents such as Health Statement (CEB) / passport / work permit, etc.
- 4. Click to confirm truthful information, then click Submit.
- 5. After the information has been added, the system will display check mark.
  - Click View status tracking to check proceeding status.
  - Click Back to member management to return to Member management Page.





### Single addition

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#### eBenefits > Policy > Member management > Add new members > Add dependents



In case the employer extends policy coverage to the employees' spouses and children, there is a dependent section on Add new member page where the member's spouse / children can be added on.

#### 1. Click Add dependents.

- 2. Fill in the details of accompanied persons.
- 3. Upload application documents such as Health Statement (CEB)/passport/work permit, etc.
- 4. Click Confirm

### **Required documents for addition**

#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

### <u>Member</u>

#### In case of filling a bank account information without signing AIA Media Clearing Form

✓ Copy of passbook front page

#### For Voluntary Group Insurance

- ✓ Copy of citizen card or passport (either one)
- ✓ Letter of Consent (from member)

#### In case of system alert "Please attach Group Insurance Member Application Form with Health Declaration (CEB Form)

✓ Group Insurance Member Application Form with Health Declaration (CEB)

#### For Student Group Insurance

✓ Group Life Insurance Application Form for Insured Person

#### For Foreign Members

✓ Copy of passport or work permit

### In case the notification is more than 31 days late and the case is not a voluntary group insurance (required effective date is over 31 days backwards from the transaction date)

✓ Group Insurance Member Application Form with Health Declaration (CEB)

#### For Voluntary Group Insurance

- ✓ Letter of Consent (from dependent/s)
- ✓ For children: Copy of Birth Certificate or House Registration indicating that the dependent is the member's child.

Dependent

 $\checkmark$  For spouse: Copy of Marriage Certificate

#### In case of system alert "Please attach Group Insurance Member Application Form with Health Declaration (CEB Form)

 $\checkmark$  Group Insurance Member Application Form with Health Declaration

### In case the notification is more than 31 days late and the case is not a voluntary group insurance (required effective date is over 31 days backwards from the transaction date)

- For children: Copy of Birth Certificate or House Registration indicating that the dependent is the member's child
- ✓ For spouse: Copy of Marriage Certificate
- ✓ Group Insurance Member Application Form with Health Declaration (CEB)

## Single Termination on eMember Movement



### Single termination

#### eBenefits > Policy > Member management > Terminate member





- 3. Notify member's exit or delete member in case of **death**.
  - Check member details and choose exit reason.
  - Indicate the effective date as the date of death.
  - Select to confirm that the information is the same as the original and click **Submit**.
  - \*\* Notification of exit has no connection with claims \*\* Claims must be submitted as normal.
- Notify member's exit or delete member in case of resignation.
  - Check member details and choose exit reason.
  - Indicate the effective date as the end date of employment contract.
  - Select to confirm that the information is the same as the original and click **Submit**.

In case the is expanded coverage for dependents, employee's exit can be notified concurrently with that of family member/s.

## Single Change of Member's Info on eMember Movement



### Single Change of Member's Info

#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

#### eBenefits > Policy > Member management > Edit member info

	Edit member info	
On Member Management menu, you can edit current member's	Policy holder name Policy no. coffee company 0000105132	
information on your own as follows:	2. Certificate no. Membership ID	1. Click Edit on the name of the selected employee.
Member management     Add new member       Policy holder name     Policy no.       Sub office	Title     First name *     Sumame *       Select     105132_02     105132_02       Don't above on card     Show on card     Show on card       Date of birth *     Gender *     Marital status * Edited       11 Nov 1995     Female     Divorce	<ol> <li>Edit information you want to change.</li> <li>Upload supporting documents.</li> <li>Click to confirm the information and click Submit.</li> </ol>
Enquire/Edit Member     Bulk add/Edit member     Download member       As of     Search criteria     Search member	National/passport ID *       Thai     National/passport ID *       Bank name     Bank account no.       Select     Bank account no.	I will Remark: The box that shows grey color means that change is not permitted.
13 May 2025       Select       Enter name/surname/certificate no./employee no.         Status       Member type         Active       Terminated       Employee         Spouse       Child       Parent       Search         Total 9 members       Search       Search	Mobile phone no.     Email       Mobile phone no.     Email       Sub office *     Employment date *       Plan *     Initial effective dat       100 - coffee comp     25 Aug 2022	<ul> <li>The box that shows * means that information must be filled.</li> <li>The box that shows *Edited means that information has been edited</li> </ul>
Cert no. ¢ Employee no. ¢ Name ¢ Member type ¢ Status ¢ Action	Employee no.         Department         Job position         Salary           Employee no.         Select         Job position         Salary	
Employee no.1 Employee Active Edit hate	Expected effective date *  DD/MM/YYYY  Effective date is subject to waiting period in policy contract and AWs	
	Supporting document <u>Checklist guide</u> File format must be pdf, doc, docx, xis, xisx, jpg, jpeg, png, csv (max 5 MB/file)     No document uploaded yet	4. I certify that the information of policyholder and employees who apply for insurance, including the documents that I have sent through the system are exactly the same as the original documents.
	+ Add document	Clear info Submit

### **Required documents for change of Member's info**

ฟ่ายประกันธุรกิจองค์กร

#### In case of editing Member's info or Dependent's info

#### Change name-surname

- ✓ Copy of name-surname change certificate
- ✓ Copy of citizen card or passport

#### Change nationality, gender, date of birth, citizen card number

✓ Copy of citizen card or passport

#### Change marital status

✓ Copy of marriage certificate or divorce certificate

#### Change bank account information

✓ Copy of passbook front page

#### Change coverage plan

✓ Change Request Form with corporate seal (if registered with corporate seal) and signing

#### In case of foreign member

Copy of passport or work permit

#### Change beneficiary

- Fill in the change information in the report of change form (Excel file) and submit the request in the system under Bulk add/edit member menu
- ✓ Change Request Form with corporate seal (if registered with corporate seal) and signing

## Bulk Member Movement via Excel file on eMember Movement



### How to do Bulk Member Movement via Excel file

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#### eBenefits > Policy > Member management > Bulk add/Edit member

In addition to notifying member's entry/exit and information change one at a Member management Add new member time, you can manage several members at a single time by changing file Policy holder name Policy no. Sub office Add member upload format as follows:  $\sim$ Edit member info On Member Management menu, select Bulk add/Edit member. Enquire/Edit Membe Bulk add/Edit membe Download member 1. Terminate member Select sub office. 2. Select bulk action Download bulk template form 3. Select bulk action. Add member  $\sim$ Terminate memb Your file must contain only 1 action (add/edit/terminate per 1 file) to ensure all info is updated correct Member management Form Download bulk template form 仚 No form added vet Policy holder name Sub office Policy no Form Download bulk template form  $\sim$ Only one file can be added per one request. Action + Add form Sample\_eBenefits\_Addition\_Template.xls Delet Bulk add/Edit member Enquire/Edit Member Download member Supporting document Checklist guide + Add form F No document uploaded vet As of Search criteria Search membe Ē Enter name/surname/certificate no./employee no 13 May 2025 Select + Add document Status Member typ 🗌 Terminated 🛃 Employee 📄 Spouse 📄 Child 📄 Parent Active Search I certify that the information of policyholder and employees who apply for insurance, including the documents that I have sent through the Total 23 members system are exactly the same as the original documents Cert no. Member type Status 🛔 Action Submit Employee no.1 Employee Active Terminate After selecting bulk action, click **Download bulk template form**. 4. Employee Active Employee no.2 Terminate 5. Fill in the Form and click + Add Form to upload Form into the system. 6. Upload supporting documents. Click to confirm truthful information and click Submit.

### Example of Addition form



ษัท เอไอเอ จำกัด											งานเพิ่ม						(กรุณาเ	เ <b>จ้</b> งเลขที่กรมธรรม์ประ	เก้นชีวิตกลุ่มของท่	านทุกครั้งที่ติดต่อกับบริ	ษัทฯ)					
แอ ทาวเวอร์ 2 ถนนสุรวงศ์ เขตบางรัก กรุงเทพฯ 10										REPOR	T OF AD	DITION					ร้อดารปฏิบัติ ,	<ol> <li>การพัฒธิม-ฟัสนบแบบสมัย มีคร่ากันมาถึงปรากฏอายารัน</li> </ol>								
ส้นท์ 0 2634 8888 โทรสาร 0 2638 CO.TH	7721																	ตั้วรับเป็นสำหรุมสีม 6. ถ้าฝีได้รับรายภาพตั้งเสียการ								
ผู้ถือกรพะรรม์																	1	<ol> <li>อามาสรบรายภาพสมสมภาย ทำประกับ และ เอโอเอ จะรับ</li> </ol>								
ne of Policyholder																	N.8.	1. For Additiona, stach Enrolin								
																				ontahown and is at present						
																	:	working Aul-Lime and Rr Aul 2. If an Addition is not reported an Evidence of insurability & approval before Group insu	s within the eligibility period or Group insurance form n							
ในอับระว/ กระสรรษ์ประกันชีวิตก	และที่ หรัสสารา/บริษัทไนเครือ	nete	สมาชิก	wa	สถานภาพสมรส	ň	น เดือน ปีเกิ	a (a.a.)	เลขที่มัดประจำด้วประชาชน /	สัญชาติ	÷	วันที่เริ่มงาน (ค.ศ	1.)	อินสีอน	érumis	NON	จึงอนาคาร	ເສຍບັດເຈົ	พรณีออิจ	5.ura	ผู้ที่อยู่ในอุปการะ	ยู่ได้รับแลประโยชน์		สายเรีย เอโอเล วันที่มีเสมบังคับ		9
ประจำตัวหนักงาน/ สำคัญที่ Group Insurance	lo. Sub office no.	Name of	Members	Sex	Marital Status		late of Birth	(A.D.)	หนังสือเดินทาง(สำหรับชาวต่างชาติ)	Nationality	Emp	oloyment Date (	(A.D.)	Annual / Monthly	Position	Plan	Bank Name	Bank Account	Mobile no.	Email	Dependent Type	Beneficiary		Effective Date		
Certificate/		Sants Firstname		ชาย = M 6 หญิง = F	มด = S , แต่งงาน = N หย่า = D		เดือน M	ปี ค.ศ Ү (А.D.)	ID Card / Passport No.for focigner		รับ D	เดียน M	ปี ค.ศ. Y (A.D.)	Mononly							C = Child , P = Parent , S = Spound C = 1, Pf , P = 1/aluni , S = gining a		รัน D	เดือน พ	ปี ค.ศ. Y (A.D.)	
																										_
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																										-
																										-
																										_
																										+
<u>เายเหตุ</u> ในกรณีที่ต้องการความ กรุณาแจ้งชื่อบริษัทเดิม /ใบรับรองการประกัน #. 20130501	์ที่โอนมาพร้อมระบุหมายเ	นิโอนอ้ายระหว่ เลขกรมธรรม์	ว่างบริษัทในเ	เครือ														วันรายงาน Date of Report				อำนาจลงนาม d Signature	_			

### **Example of Termination form**

<b>บริษัท เอไอเอ จำกัด</b> เอไอเอ ทาวเวอร์ 2 181 ถนนสุรวงศ์ เขตบางรัก ก โทรศัพท์ 0 2634 8888 โทรส AIA.CO.TH นามผู้ถือกระระม์ Name of Policyholder กระรรณ์ประกันชีวิตกลุ่มเตชที่ Group Insurance No			_	<u>ายงานการออกจา</u> EPORT OF TERMIN		معتميزش دم Immediately Caution when filling Termination Form
ไปกับรองเครที่ Certificate number	รายชื่อสมาสิก / คู่สมรส / บุคร Name of Member / Spouse / Child ซิชาซิง นามสกุล Firstname Surname	ตายก (Resign) = T02 เสียชีวิต (Death) = T04	ັນທີ່ບໍ່ Last employment ຈົນ D	ระสถัญญาร์าง - กรณีสาธออก สิงธิวิต - กรณีสิงธิวิต date - Resign Death date - Death เพียน ปิ ค.ศ. M Y (A.D.)	ารมายเหตุ Remarks	<ul> <li>Not indicate information on certification number, real name and surname, end date of employment contract/date of death and exit reasons of the member.</li> <li>Repeated names of members on the uploaded file.</li> <li>Incorrect certification number: Please enter zero in front to make 10 digits.</li> </ul>
*	เมารณาตองการหวามคุมครองอย กรุณาแจ้งขีอบริษัทใหม่พร้อมระบุง				биятыкла биятыкла ялындай FCOO Date of Report Authors	

### Example of Change form

#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

#### บริษัท เอไอเอ จำกัด

เอไอเอ ทาวเวอร์2

181 ถนนสุรวงศ์ เขตบางรัก กรุงเทพฯ 10500 โทรศัพท์ 0 2634 8888 โทรลาร 0 2638 7721 AIA.CO.TH

นามผู้ถือกรมธรรม์

Name of Policyholder

#### (กรุณาแจ้งเลขที่กรมธรรม์ประกันชีวิตกลุ่มของท่านทุกครั้งที่ติดต่อกับบริษัทฯ)

- ร้อความฏิบัติ 🥿 การเงินเสียงได้แบบแบบสมัด และรายซึ่งสมาริกรู้มีสิทธิสำร่วมส่งสมาริได้มิฏิบัติงาน สิ่งสรกับมาสุดไฟน์ เพื่อรับเป็นค่าแรงเดิม
  - ๒. ถ้ามีได้รับรายงานเพิ่มเสิมภายในระยะเวลาของการมีสิทธิภายใส้กรมธรรม์ของท่าน

ทำประกัน และ เอไอเอ จะรับก็ต่อเมื่อพอใจ และเห็นชอบด้วย

N.B. 1. For Additions, attach Enrollment Forms and list each employee who has been

continuosly in your employ since the date of employment shown and is at present

working full-time and for full pay.

 If an Addition is not reported within the eligibility period under your policy, an Evidence of Insurability for Group Insurance form must be submitted for AIA 's approval before Group Insurance is granted.

ใบรับรอง/ เลขประจำตัวหนักงาน/ ลำลับที่	กรมธรรม์ประกันชีวิตกลุ่มเครที่ Group Insurance No.	รหัสดาขา/บริษัทในเครือ Sub office no.		วันที่เปลี ate of Ci		เหตุผลที่เปลี่ยน Reason of Change		ลี่ยาแปลง Change	หมายเหตุ
Certificate/			วัน	เดือน	ปี ค.ศ.		จาก	เป็น	Remarks
Employment No.			D	м	Y (A.D.)		From	to	

<u>รายงานการเปลี่ยนแปลง</u>

REPORT OF CHANGE

<u>หมายเหตุ</u> ในกรณีที่ต้องการความคุ้มครองอย่างต่อเนื่อง กรณีโอนย้ายระหว่างบริษัทในเครือ

กรุณาแจ้งชื่อบริษัทเดิม ที่โอนมาพร้อมระบุหมายเลขกรมธรรม์

/ใบรับรองการประกันที่ช่องหมายเหตุ



วันรายงาน

Date of Report

ลายเซ็นผู้มีอำนาจลงนาม Authorized Signature

[AIA - INTERNAL]

Ver. 20130501

## Member List Download



### How to download Member List



#### eBenefits > Policy > Member management > Download Member

#### You can download policy member's information in Excel file as in the steps below:

Member ma	anagemei	nt					Add new member
Policy holder name		Policy no.		Sub office			
				100 - มรีxxxxแอลที เซ	อร์วิสเซส จำกัด		~
Enquir	e/Edit Member		Bulk add/	dit member	1.	Downl	oad member
As of		Search criteria		Search member			
13 May 2025		Select	~	Q Enter name/surna	ame/certificate n	o./employee no	l.
Status		Member type					
Active	Terminated	Employee	Spouse	Child Parent			Search
Total 23 member	S						
Cert no. 🛊	Employee no.	<b>♦</b> Name <b>♦</b>		Member type 🛊	Status 🖨		Action
		Employee n	0.1	Employee	Active	Edit	Terminate
		Employee n	~ <b>)</b>	Employee	Active	Edit	Terminate

М	ember manageme	nt		Add new member						
	icy holder name f <b>fee company</b>	Policy no. 0000105132	2. Sub office 100 - coffee company	· •						
	Enquire/Edit Member		Bulk add/Edit member	Download member						
As	of									
	13 May 2025									
Sta	Active CTerminated	5. Member type		6. Download						

- 1. Click **Download Member Information** menu.
- 2. Select branch/sub office you want to download information.
- 3. Select period of the information.
- 4. Select member category: coverage still valid or terminated.
- 5. Select policy member category: employee or spouse/child.
- 6. Click Download to download file.
  - If download is successful, the system will show "Download Complete."

### **Example of Member List File**



#### Member Listing

As At: Report Date:

Client:

Sub Office:

Policy:

Department:

Bill Mode of Payment: Annual

#### Note: The member information shown above is solely based on the actual member census submitted by Policyholder.

	Name	Dep Membersh					Date of Birth	Age		YEARLY RENEWABLE TERM LIFE ACCIDENTAL DEATH AND DISABLEMEN								MENT (CO	N)	
Cert. No.			Membership ID	Employee No	Gender	r M/S			Plan	Coverag e Type	Eff Date	Ins Amt	Uw/Sts	Product Status	Plan	Coverag e Type	ETT Date	Ins Amt	Uw/Sts	Product Status
		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY MEMBER	1 May 2025	2,000.00	A	Terminated	002	MEMBER	1 May 2025	200,000.00	A	Terminated
		Member			Female	Married	11 Nov 1995	29	002	ONLY	25 Aug 2022	2,000.00	A	Active	002	ONLY	25 Aug 2022	200,000.00	A	Active
,		Member						29	002	ONLY MEMBER	25 Aug 2022	2,000.00			002	ONLY MEMBER	25 Aug 2022	200,000.00		Active
n		Member					11 Nov 1995	29 7 29	002 • 002	ONLY MEMBER ONLY	25 Aug 2022 25 Aug 2022	2,000.00		Active	002 • 002	ONLY MEMBER ONLY	25 Aug 2022	200,000.00		Active
1		Member					11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00			002	MEMBER ONLY	25 Aug 2022 25 Aug 2022	200,000.00		Active
1		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00		Active	002	MEMBER ONLY	25 Aug 2022	200,000.00		Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY MEMBER	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY MEMBER	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	ONLY	25 Aug 2022	2,000.00	А	Active	002	ONLY	25 Aug 2022	200,000.00	А	Active
		Member			Female	Married	11 Nov 1995	29	002	ONLY	25 Aug 2022	2,000.00	A	Active	002	ONLY	25 Aug 2022	200,000.00	A	Active
Underw	riting Status																			
A - /	Approved																			

## eMember Movement Status Tracking


# **eMember Movement Status Tracking**

#### eBenefits > Status tracking

After requesting entry/exit/change of employees or document download, you can track proceeding status in eBenefits system as follows:

1. Select Status tracking



Status tracking will consist of 2 menus:

- 1. Member request menu is used for tracking change situation.
- 2. Download task menu is used for tracking file download situation.

Status tracking	9						
	Member reque	est •	3.	Down	nload task		
Request date from	То		Search criteria		Search request		
14 Apr 2025	13 M	1ay 2025	Select	~	Q Enter re	quest no., polio	y holde
Status							
Require info/document	t 🔽 Wait for ap	oproval 🔽 O	n process	Rejected by AIA	🔽 Re	jected by pol	icy holde
Expired	Completed	l with condition 🔽 C	ompleted				
						Search	
						Search	
Total 36 requests							
Status 🜲	Request no.	Policy holder name 🛔	Туре 🜲	Request date	Last updated €	Requesto	Action
• Wait for approval	6670		Terminate - Bulk	13 May 2025	13 May 2025		View
On process	6671		Add - Individual	13 May 2025	13 May 2025		View

# **eMember Movement Status Tracking**

#### eBenefits > Status tracking

Status tracking	1	The rec	d dot notifies the	update of el	1ember Movemen
	Member request •		Dowr	nload task	
Request date from	To 13 May 2025 [	Search criteria	~	Search request	quest no., policy holde
Status	✔ Wait for approval ✔ On p	process	Rejected by AIA	🔽 Re	jected by policy holder
✓ Expired	Completed with condition  Com	pleted		4.	Search
Total 36 requests					
Status 🖕	Request 🝦 Policy holder name 🖨	Туре 🖕	Request date	Last updated	Requesto Action
Wait for approval	6670	Terminate - Bulk	13 May 2025	13 May 2025	6. Viev
On process	6671	Add - Individual	13 May 2025	13 May 2025	View
On process	6669	Edit - Individual	13 May 2025	13 May 2025	View

After requesting entry/exit/change employees, you can track current proceeding status from **Member request** menu as follows :

- 1. Select Member request
- 2. Select request date
- 3. Select proceeding status you want to check.
- 4. Click Search
- 5. The list of the requests will appear.
- 6. Click **View** to see more details.

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#### When will the red spot appear?

Request sender will see this red spot which will appear when the status is changing such pending approval / require more information / in process / expire.....

### การตรวจสอบสถานะการดำเนินการ

#### eBenefits > Status tracking

Request status On process		Request no. <b>6657</b>	Request date 8 May 2025		
Policy holder r	name	Policy no.	Sub office	2	
Q	Status history Status	Ву	Action date	Remarks	
	On process		8 May 2025 15:26	See more	
	Submitted request		8 May 2025 15:26	-	
	Form				
Ţ	Bulk action type		File name		

#### Status tracking details

On Status Tacking Details Page, you will see the following information:

- 1. Numbers that follow xxx are for reference to the specific request.
- 2. Status history will show the progress of the request which will be sorted from the most recent down.
- 3. The detail of the movement based on the type of movement, Add/Terminate/Change.

## **The Definition of the Status**



	Status	Definition
Ø	Require info/document	AIA requests additional documents or information.
_	Wait for approval	Awaiting approval from the policyholders.
	On process	AIA is processing the requests.
Ð	Rejected by AIA	Request rejected by AIA.
D	Rejected by policyholders	Request rejected by policyholders.
	Expired	Request has expired and needs to be resubmitted.
9	Completed with condition	Some members need to attach additional documents or need more information if the upload was successful only for some members using an Excel file.
	Completed	AIA has successfully processed the changes.

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## How to track download status

#### eBenefits > Download track

#### Status tracking Member request Download task Total 2 tasks Status Task no. Task name Task description Action Policy Sub office code : 100 As of date : 8 May 2025 Ready for Download Member Listing Download download Include dependent information : No Include terminated record : Yes File format : New format Policy Sub office code : 100 Ready for As of date : 8 May 2025 Download Member Listing Download Include dependent information : No download Include terminated record : Yes File format : New format

Once documents are downloaded, created documents will be saved in Download member. You can check download status and click download again as follows:

- 1. Select **Download task** to view all downloaded documents.
- 2. The list of the created documents and the details will be shown as follows:
  - Status is used to view download status.
  - Task name is used to view download type.
  - Task description bar is used to view details of downloaded information.
  - Action bar is used to re-download created files.

# eMember Movement Approval



# eMember Movement Approval



#### eBenefits > Status tracking

If the agents/brokers make changes on behalf of the policyholders and send an approval request to HR or an authorized signatory, the policyholders registered with eBenefits will receive an email notification of the policy changes. They can review and approve the requests by following these steps:

	eBenefits Policy Bills Claims	ໂກຍ EN @ Log out
eBenefits 867: Request for approval Add new member of	Welcome,	
2.	Quicklin	
th.eb.services@aia.com         To         \$\$ Translate message to: English         Never translate from: Thai         Translation preferences	4. Policy	Bills Claims
Please see the information as below. Request No / Case ID : 867		king Form and Manual
Requestor Request Type : Add new member	Updated!	
Type       : Individual         Requested date time       : 27-Feb-25 16:39         Action Update Date Time :		
Status : Wait for approval Link 3. : <u>Access to eBenefit</u>	<ol> <li>The policyholders will receive an approval request email th.eb.services@aia.com. The email subject will include th type of transaction, and company name.</li> </ol>	

- 2. The email will consist of the request number, requester, Request type, Requested date, status, and a link to access eBenefits.
- 3. Click the link to access eBenefits and log in.
- 4. Once logged into eBenefits, go to Status tracking.

# eMember Movement Approval



#### eBenefits > Status tracking > Waiting for approval

Member request •		Download task			cking no. <b>6670</b>	Bulk terminate member		
Request date from     To       14 Apr 2025     13 May 2025       Status     5	Search criteria	Search request	9. est no., policy holde	Request status Wait for approval Policy holder nam		Request no. <b>6670</b> Policy no.	Request dat 13 May 202 Sub office	
Require info/docu  Wait for approval  Expired  Completed with cond		ejected by AIA Reject	ted by policy holder	to proceed	y for terminating membersh d with the claim in other cha Gtatus history	ip of the policy. Claim submissi nnels.	on is still required to process	
Total 1 requests		7.	Search	•	Status Wait for approval Submitted request	<b>By</b> Wissuta Wissuta	Action date 13 May 2025 11:11 13 May 2025 11:11	Remarks See more
Status 🔶 Request 🔶 Policy hol no. 🕈 Policy hol	der name 🛊 Type 🕏	Request Last date	Requesto Action	Ť.	Form	WISSULG	15 Mdy 2025 11:11	•
Wait for approval 6670	Terminate - 13 Bulk	3 May 2025 13 May 2025	8. <u>View</u>	<u>ل</u>	Bulk action type		File name eBenefits_Terminate_Temp	

6. Select Wait for approval status in the filter section.

7. Click Search.

8. Click View at the request that you would like to see the detail.

9. The system will take you to the page displaying details of the requested changes in order to verify the information.

10. Click Reject or Approve based on the accuracy of the information.

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The approval requests will expire in 15 days.

# How to check Payment Status and Download eBill



# How to check Payment Status and Download eBill



#### eBenefits > Bills



- 2. Select company and branch/suboffice you want to view premium information.
- 3. Select more information that you want to search.
- 4. Select bill status.
- 5. Click Search

eBenefits	Policy	Bills Claims			ไทย   EN	Q Log out
Bills 2.						
olicy holder				8	Sub office	~
3. Select	~	Search member/certific				
Duration criteria		Policy year	Bills	date from	То	
A period of	~	Select	~ 22	May 2024	21 May 2025	<b></b>
All	Outstanding				5.	Search

# How to check Payment Status and Download eBill

#### eBenefits > Bills

Examples for demonstrating premium details and downloading eBill

eriod		Bill number	Product	Total billed amount	Paid amount	outsta	Current anding mount	Bill issue date	Bill paid date	Member details	eBill	THERE AND ANY TERMONOLOGICAL AND A STATE A	Tarivanta	
			Details	15,055.00	15,055.00 Expand 🗸		0.00	22 Nov 2024	30 Nov :	<u>Details</u>	Download	<ul> <li>State Section 2019, such as indexes distribution of section 2019, such as the section of section 2019, such as the section 2019 spectra as a section 2019, such as the section 2019, sect</li></ul>	r fører har gåsterende meneralet.	
			Total	15,055.00	15,055.00		0.00					reflation for White Approximate Second Second Seco	antine Cardo a Carago de 2 set res	
Bill number Prod	uct Total bille amour		Current outstanding amount	Bill issue date	Bill paid date	Member details	eBill				L	Construction for the set of	Manan Iso anna anna anna anna anna anna anna an	
Deta	<u>il</u>	5,055.00	0.00	22 Nov 2024	30 Nov 2024	Details						geo alae		
YEARLY RENEWABLE TERM	LIFE 1,650.0	0 1,650.00	0.00											
ACCIDENTAL DEATH DISABLEMENT (C		0 1,350.00	0.00						•	When a	clicking eBill <b>Dow</b>	vnload, you will receive	e Zip file.	
TOTAL AND PERMANENT DISAB	ILITY 170.0	0 170.00	0.00						•	The file	will consist of	·	BillReport_0000130801_202405A00	00
SIMPLIFIED HOSPITAL AND SURG	ICAL 11,885.0	0 11,885.00	0.00								Bill document file	ρ	PremiumStatementDetail_000013	
		Collapse 🔨												
Click Ex	pand to vi	ew the det	ails of the	coverage	and premi	um.			•			ig premium details of e vnload after Group Insu	irance Team has verified	

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Payment status can be checked from item Paid amount and Current • outstanding amount.



all attached documents.

CORPORATE

SOLUTIONS

ฟ่ายประกันธุรกิจองค์กร

- PremiumStatementDetail\_0000130...

# Form and Manual



## Form and Manual

#### CORPORATE SOLUTIONS ฟ่ายประกันธุรกิจองค์กร

#### eBenefits > Form and Manual

User can dowanload the user manuals and all supporting documents from Form and Manual menu as in thw steps below.

- 1. Select Form and Manual
- 2. Select the types of the manuals or documents that users would like to download.
- 3. Click on the file that users would like to download.

eBenefits Policy Bills Claims	Ins EN Q Log out	Form	and Manual	
Welcome, Last logist. 8 May 2023 15:us ==		2.	User guide and Form eMember Movem	nent guide Others menu guide
HEALTHIER, LONGER, BETTER LIVES	Quicklinks	3. 🗊	REQUEST ACCESS TO EBENEFITS How to request eBenefits account How to reset password Authorized representatives and electronic service registration for GROUP INSURANCE MEMBER MANUAL Group insurance employee benefits handbook AIA+ AIA+ application manual for Group insurance members	i <mark>orm (KYC)</mark>

# THANK YOU

