eBenefits User Guide

for policyholders

May 2025

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How to access eBenefits

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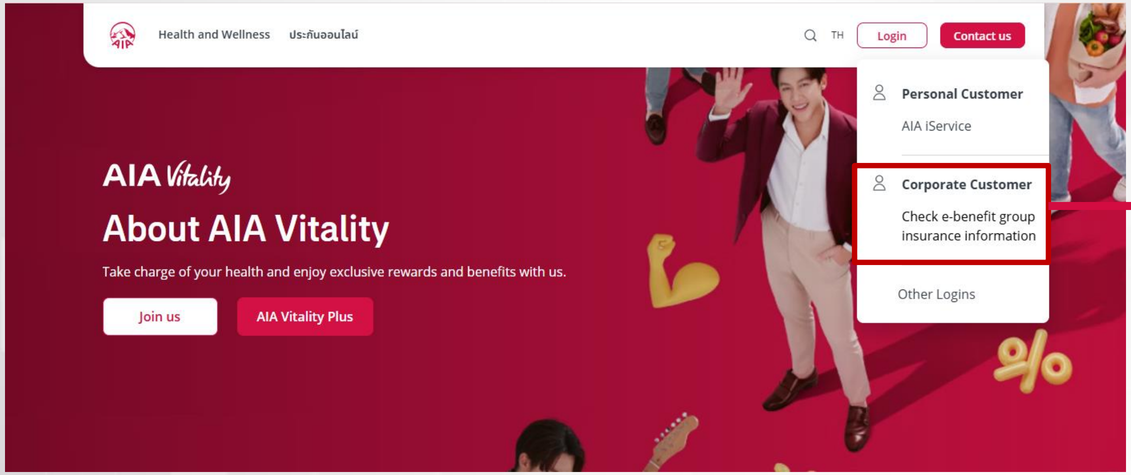

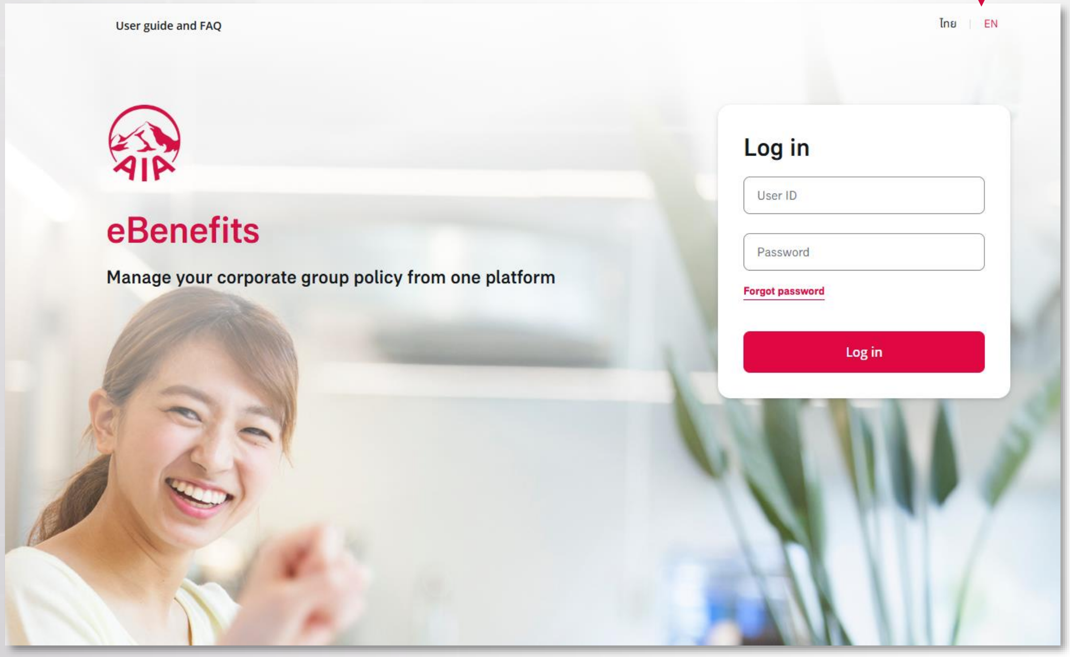

How to log in to your eBenefits:

1. Go to www.aia.co.th
2. Log in as Corporate Customers
3. Log in with your eBenefits username

How to Request eBenefits Account for policyholders

How to request eBenefits account for policyholders

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

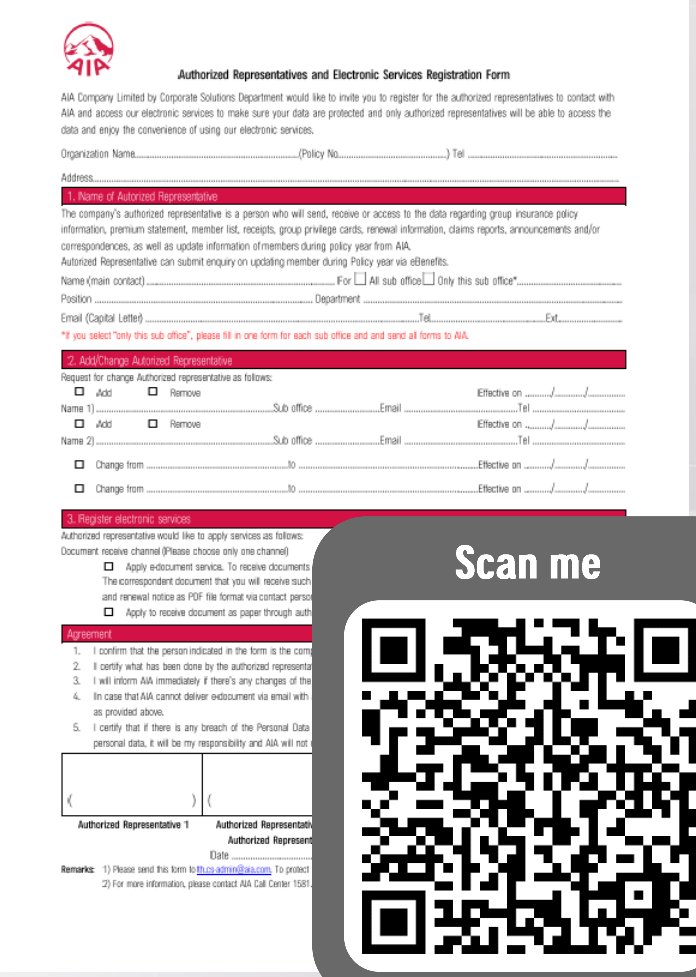
1. PREPARE DOCUMENT

- 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 th.cs.admin@aia.com.

- After submitting request by the email, you will get a reply email from th.eb.services@aia.com 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

AIA Company Limited by Corporate Solutions Department would like to invite you to register for the authorized representatives to contact with AIA and access our electronic services to make sure your data are protected and only authorized representatives will be able to access the data and enjoy the convenience of using our electronic services.

Organization Name.............................(Policy No.......................) Tel ....

Address...

1. Name of Autorized Representative

The company's authorized representative is a person who will send, receive or access to the data regarding group insurance policy information, premium statement, member list, receipts, group privilege cards, renewal information, claims reports, announcements and/or correspondences, as well as update information of members during policy year from AIA.

Autorized Representative can submit enquiry on updating member during Policy year via eBenefits.

Name (main contact) .... For ☐ All sub office ☐ Only this sub office*.....................

Position .... Department ....

Email (Capital Letter) ....Tel..........................Ext.....................

*If you select "only this sub office", please fill in one form for each sub office and and send all forms to AIA.

2. Add/Change Autorized Representative

Request for change Authorized representative as follows:

☐ Add ☐ Remove Effective on ..../......./.......

Name 1) ....Sub office ....Email ....Tel ....

☐ Add ☐ Remove Effective on ..../......./.......

Name 2) ....Sub office ....Email ....Tel ....

☐ Change from ....to ....Effective on ..../......./.......

☐ Change from ....to ....Effective on ..../......./.......

3. Register electronic services

Authorized representative would like to apply services as follows:

Document receive channel (Please choose only one channel)

☐ Apply e-document service. To receive documents

The correspondent document that you will receive such

and renewal notice as PDF file format via contact person

☐ Apply to receive document as paper through auth

Agreement

1. I confirm that the person indicated in the form is the comp
2. I certify what has been done by the authorized representat
3. I will inform AIA immediately if there's any changes of the
4. In case that AIA cannot deliver e-document via email with as provided above.
5. I certify that if there is any breach of the Personal Data personal data, it will be my responsibility and AIA will not

( )	(

Authorized Representative 1 Authorized Representativ

Authorized Represent

Date ....

Remarks: 1) Please send this form to th.cs.admin@aia.com. To protect

2) For more information, please contact AIA Call Center 1581.

Scan me

Download the application form here

How to request eBenefits account for policyholders

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

T th.eb.services@aia.com
To

2. Password notification

Confirmation of User Registration - Password Notification for company XXXX

T th.eb.services@aia.com
To

Learn about eBenefits

Explore eBenefits

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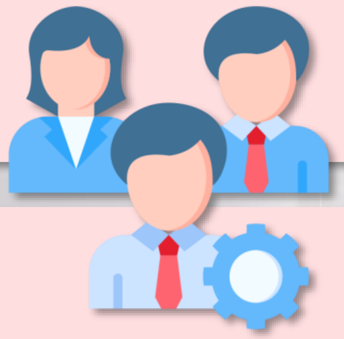
Both policy administrators and policyholders can manage information and group insurance members during the policy year regarding the topics below.

Policy Management

- Check policy benefits and information of members of a policy
- Manage the member of the policy



eMember Movement

- Report employees' entry and exit and check real time status
- Change information or review policy plan for employees

Claim Monitor

- Check claims information
- Claims control

eBill Download

- Check premium bills
- Download bills for group insurance

เปลี่ยนเพื่อสิ่งใหม่ เติบโตอย่างยั่งยืน
CS Transformation

eBenefits

POLICY – Check policy information and manage policy members

BILL – Monitor payment status and download bills

CLAIMS – Check claims history

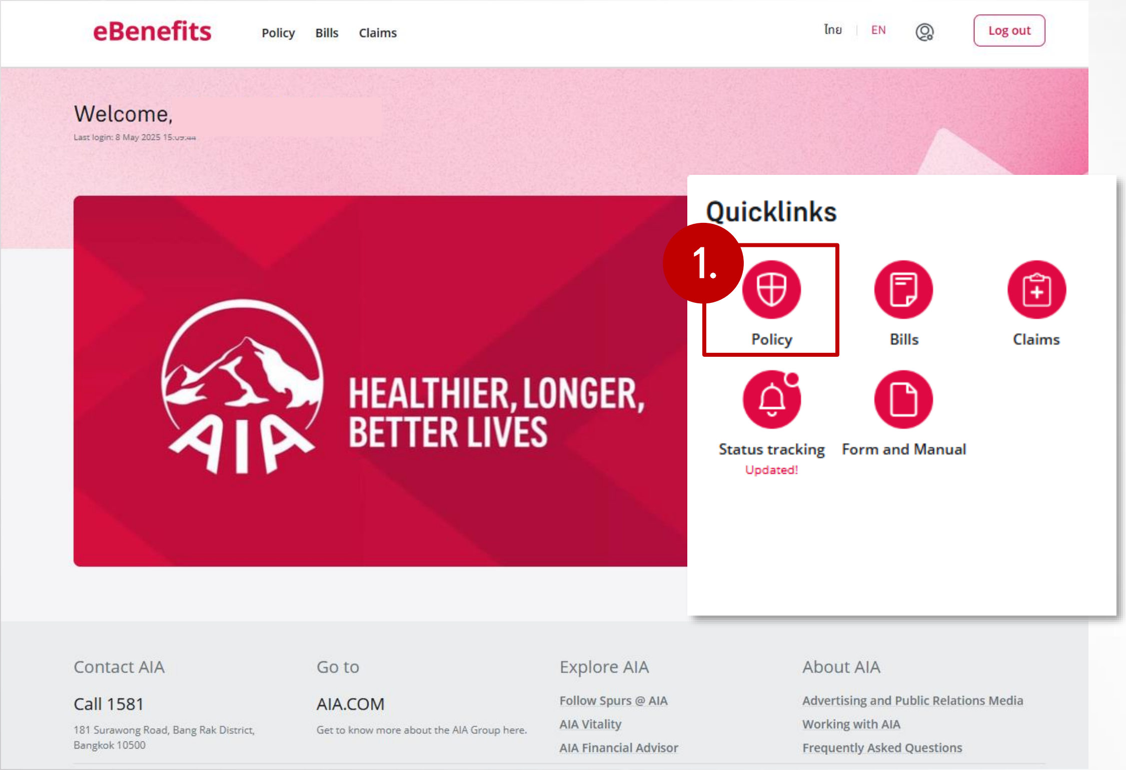
STATUS TRACKING – Monitor change status

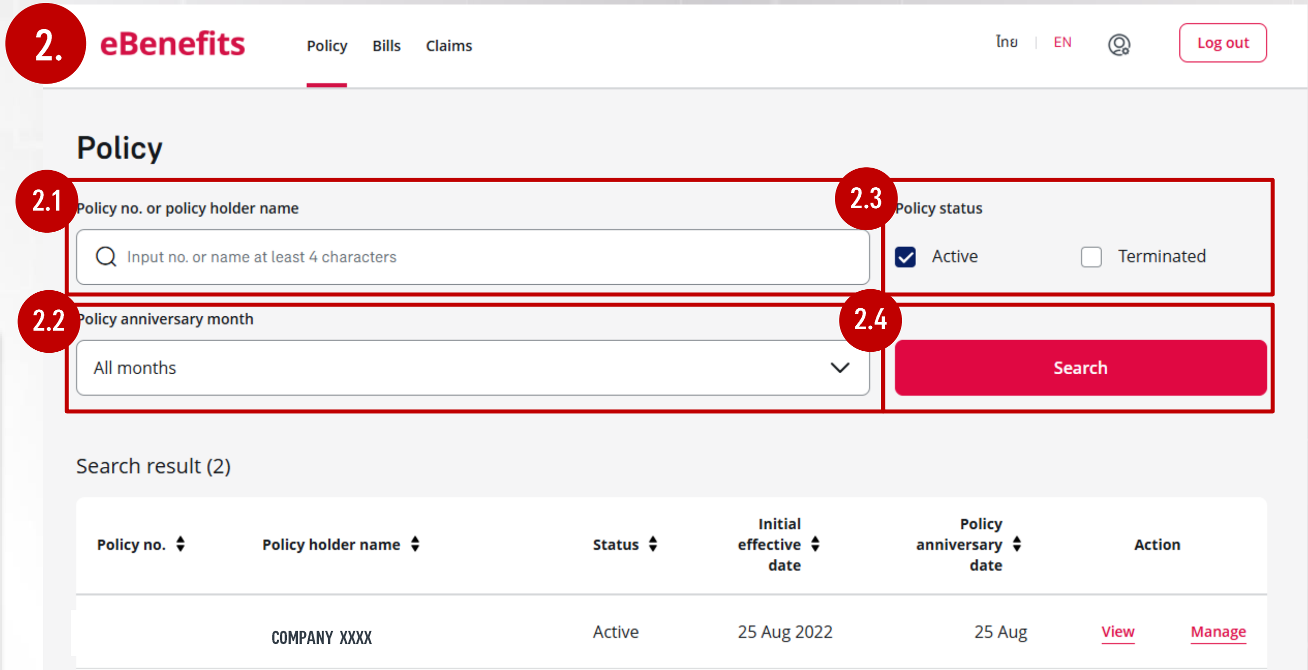
How to View Policy Information

How to view policy information

eBenefits > Policy

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





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.

How to view policy information

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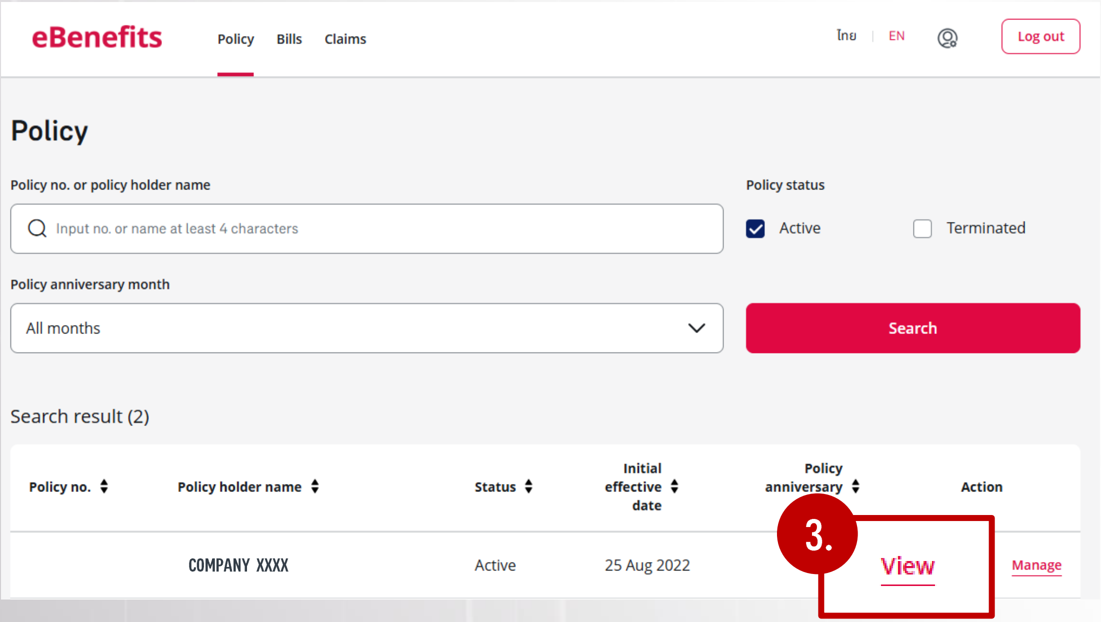
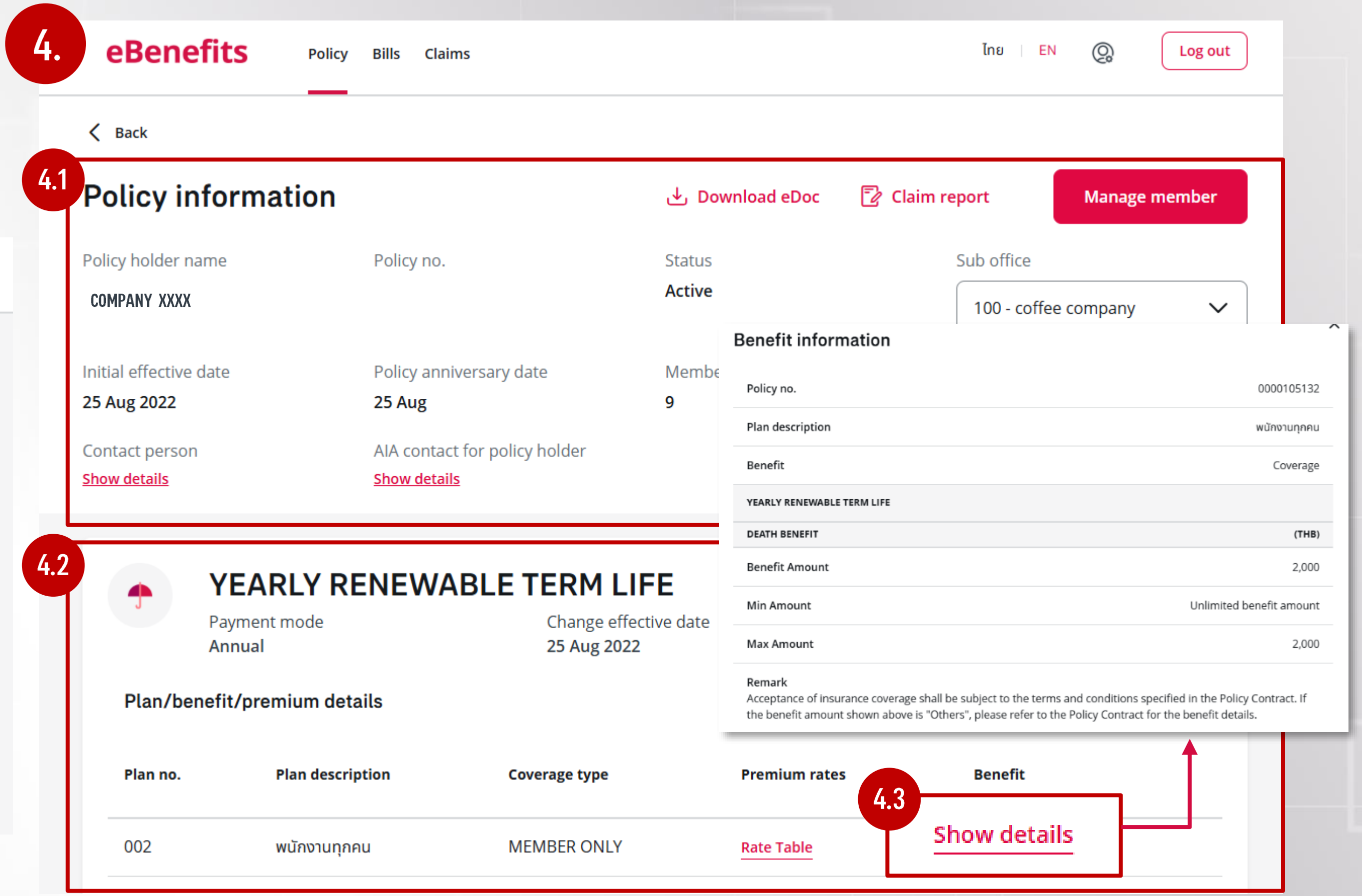
eBenefits > Policy > Policy information

3. After getting your search result, click **"View"** to see policy information.





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**.

How to view policy information

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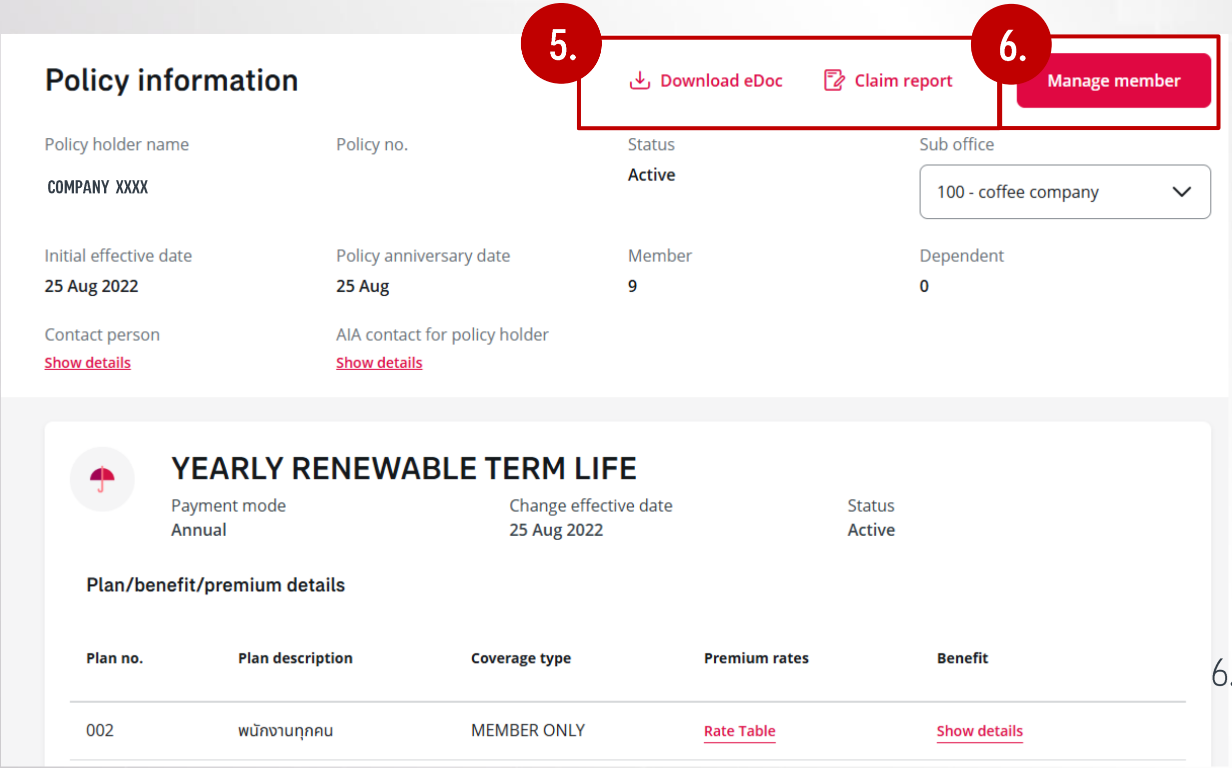
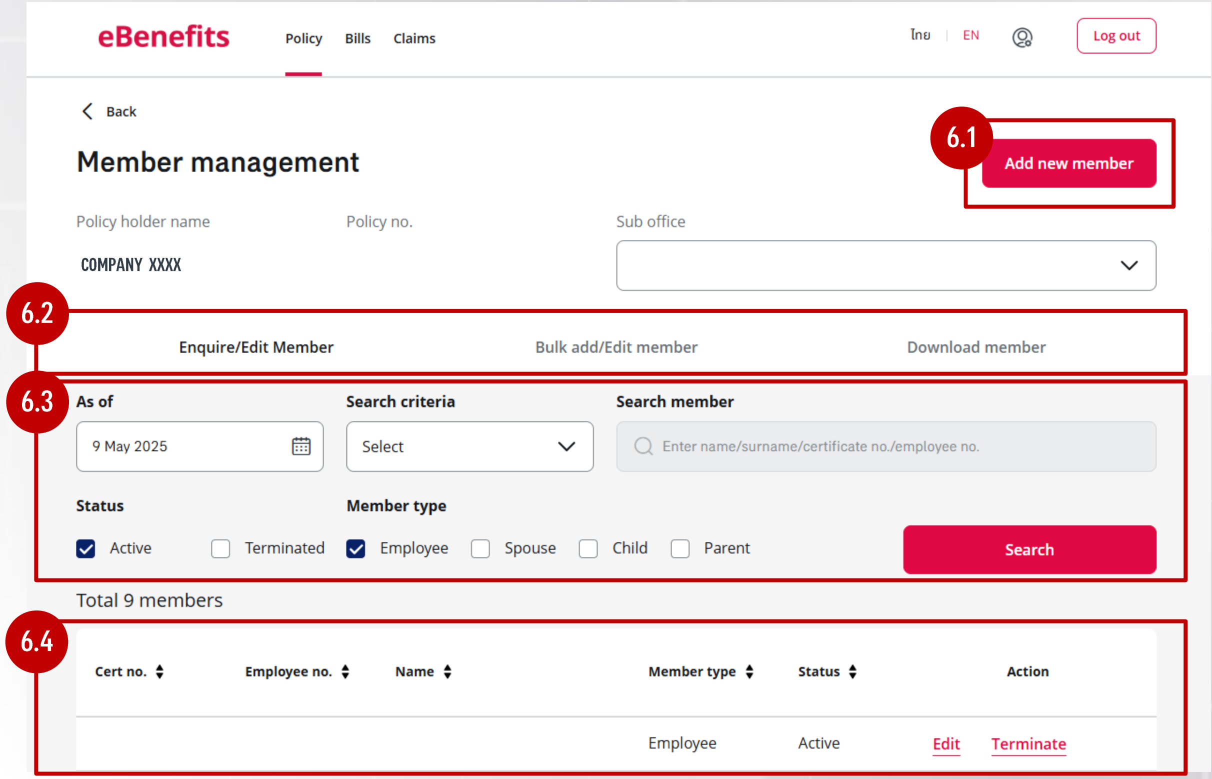
eBenefits > Policy > Policy information

5. Click to download **Premium Bills** and **View Claim Report**





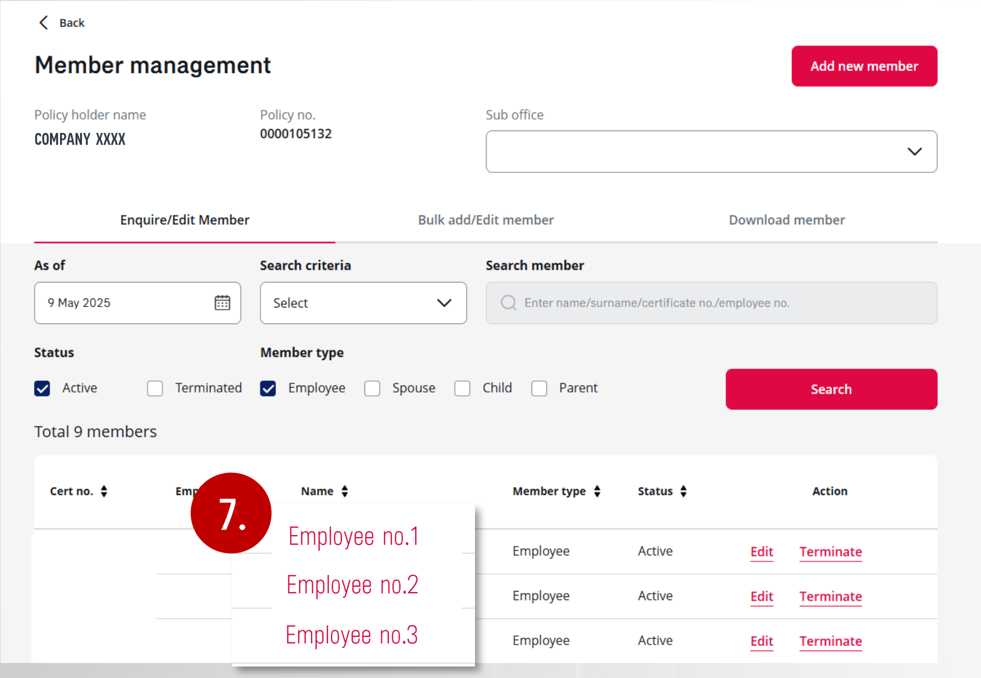
6. Click **Manage member** to edit or manage policy members. The system will take you to **Member management page** which consists of the following menus:

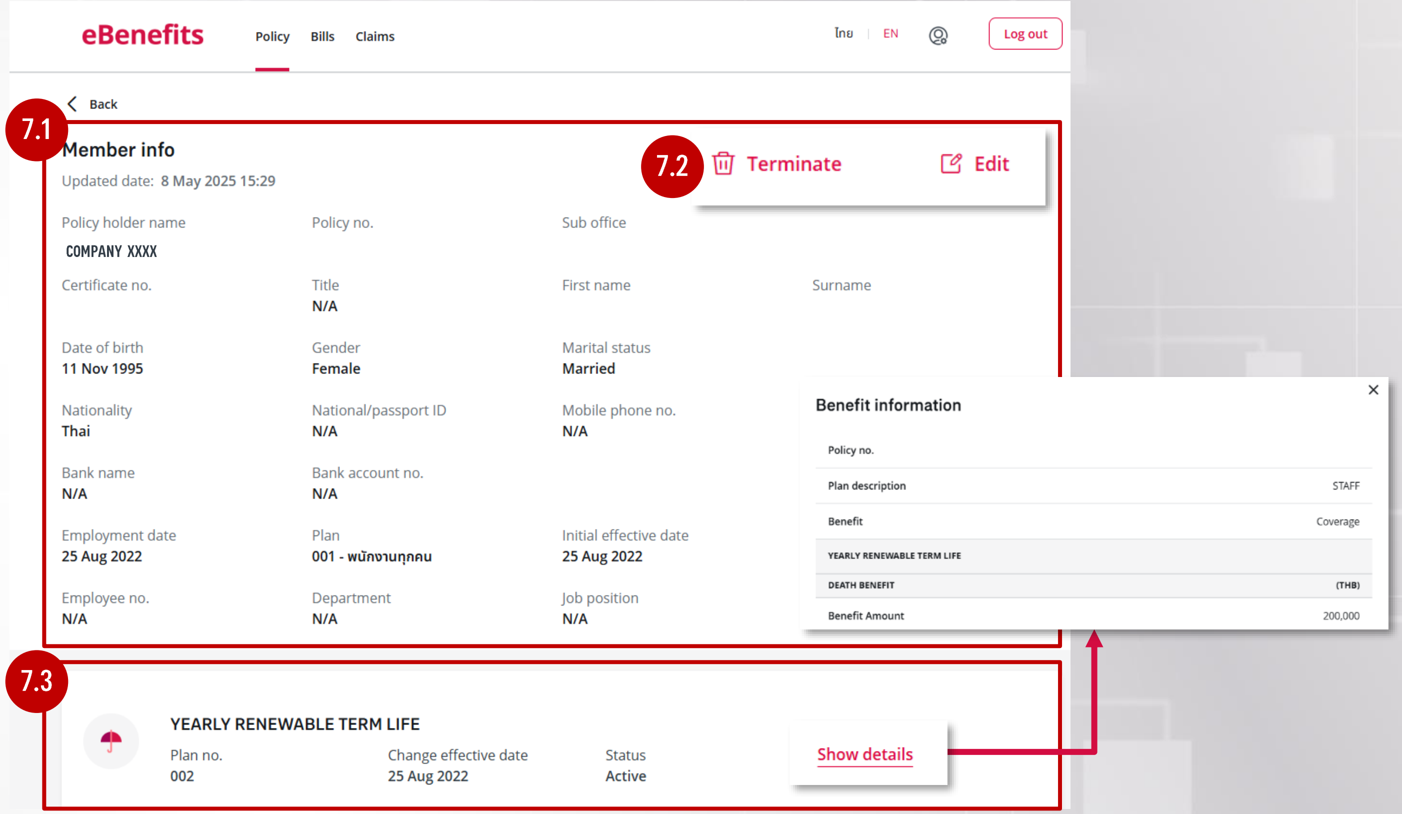
6.1 Click **Add new member** to add policy members.
6.2 Menu bar.
6.3 Member search filter.
6.4 List of policy members.

How to view policy information

eBenefits > Policy > Policy information > Member management

7. Click on **Members' Name** to view coverage details and personal data.
   7.1 Member information details (the system will indicate last updated date).
   7.2 Click to **Terminate member** or **Edit member's information**.
   7.3 Details of members' coverage.





How to view policy information

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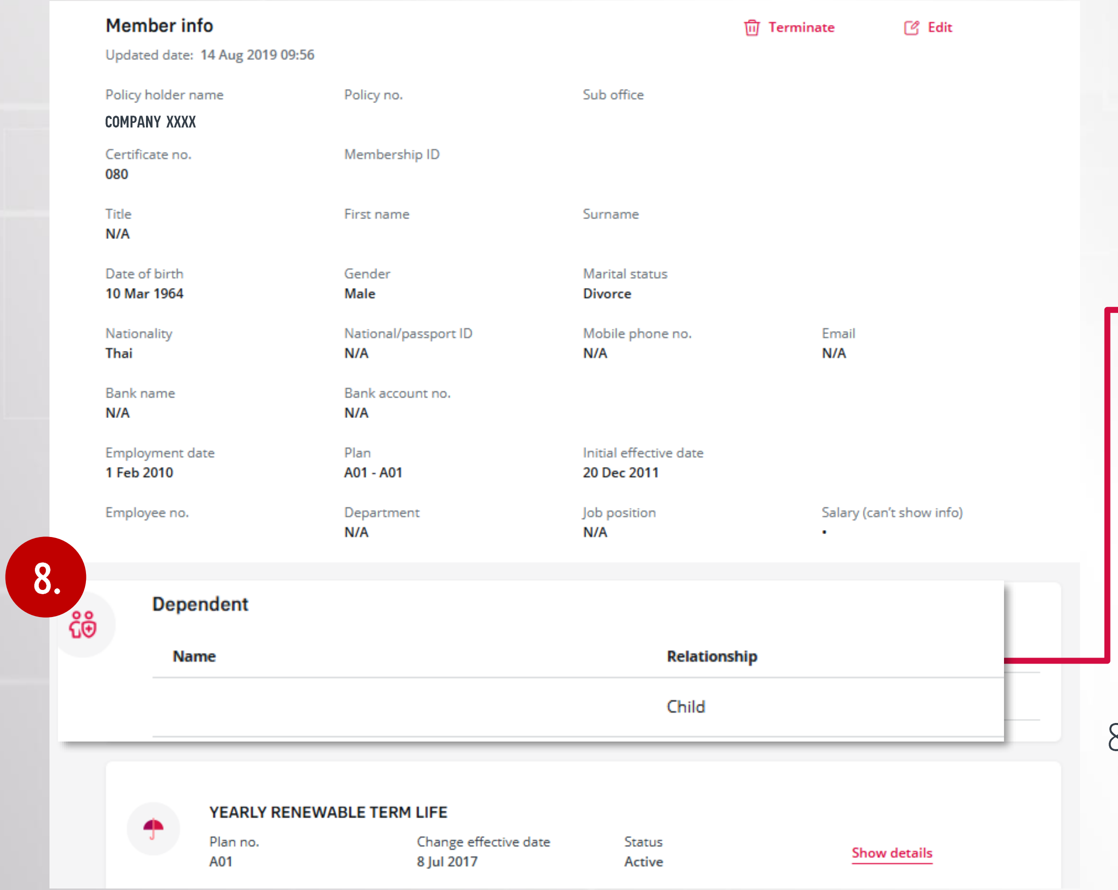
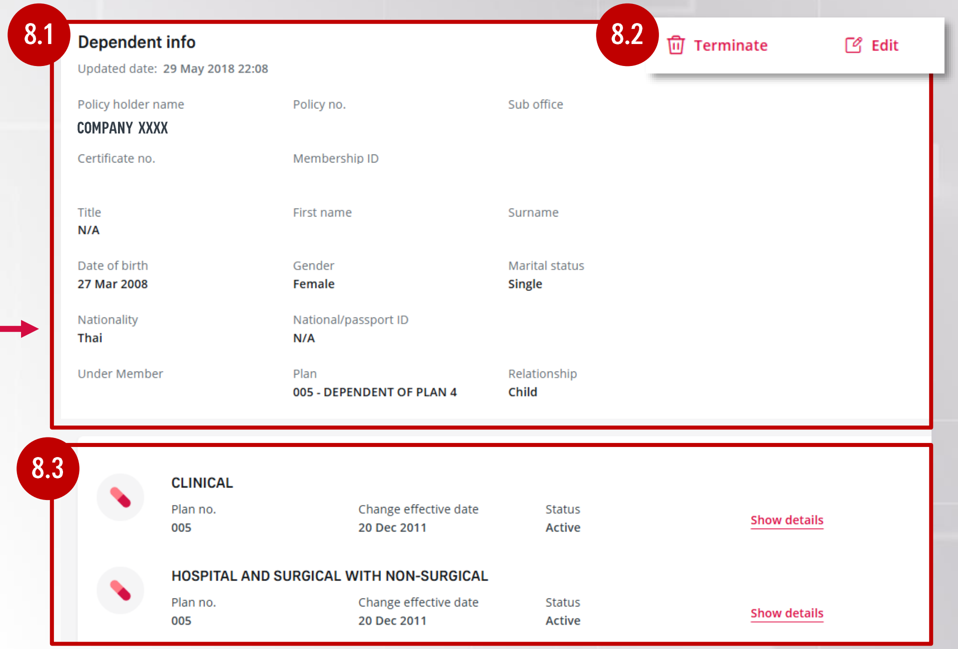
eBenefits > Policy > Policy information > Member management > Dependent info





8. If the employer extends coverage to employee's family, information of family members will be displayed on the Member Information Page as well.

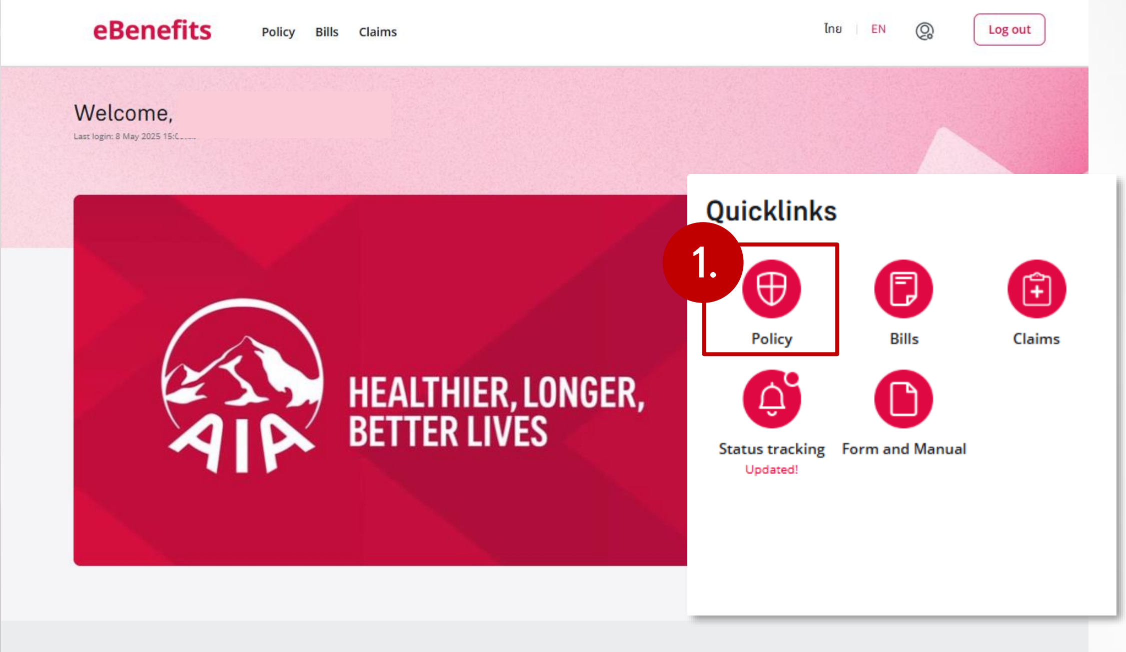
8.1 Details of dependents (the system will indicate last updated date).
8.2 Click to **Terminate** or **Edit Member's Information**.
8.3 Details of dependents' coverage.

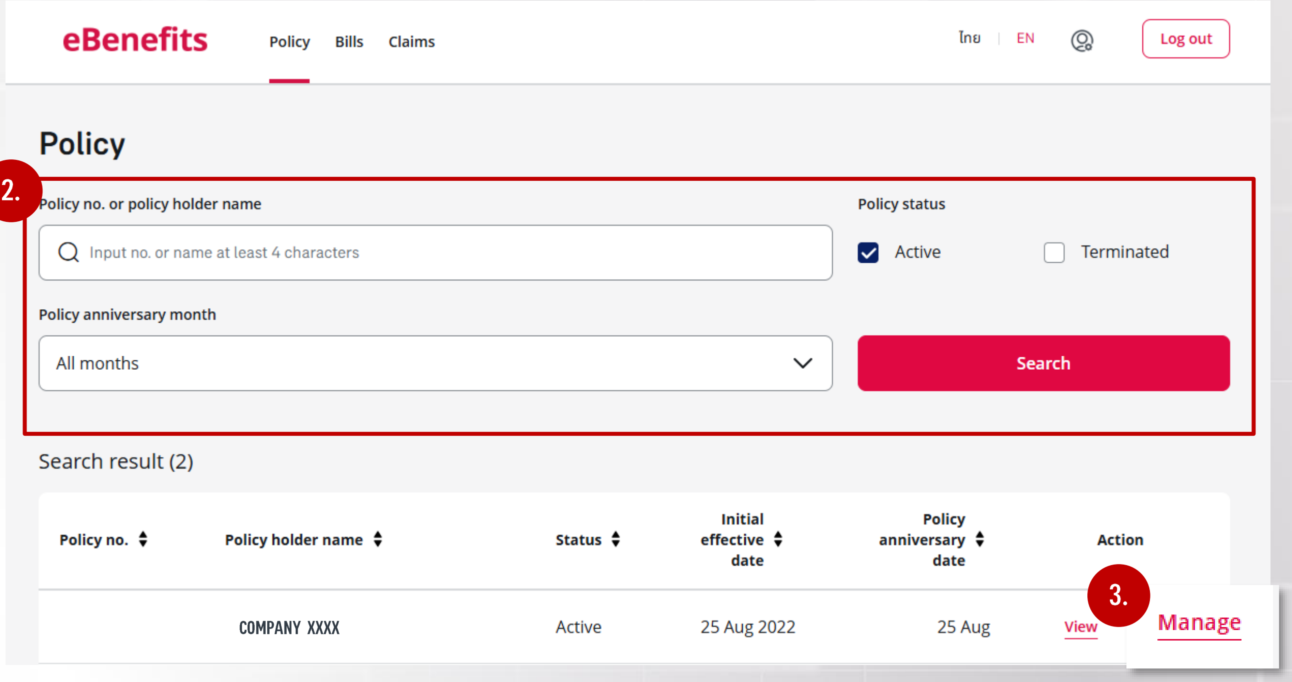
eMember Movement

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:





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

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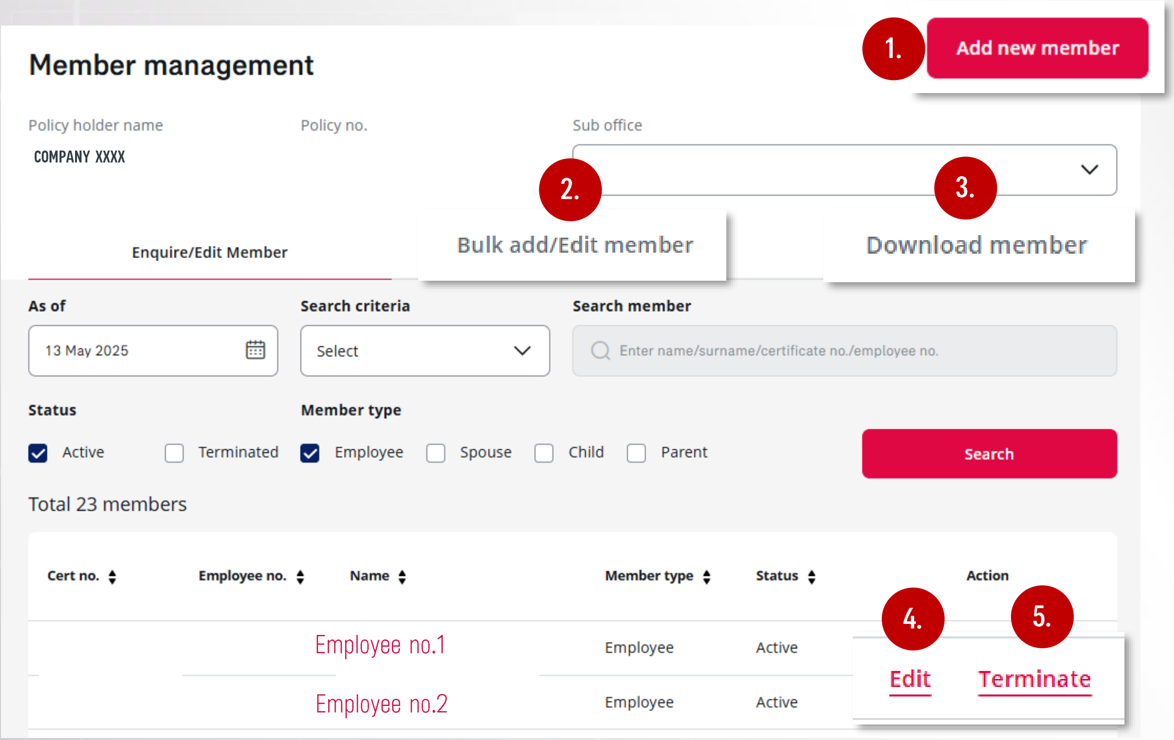
eBenefits > Policy > Member management

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 <u>one by one.</u>
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

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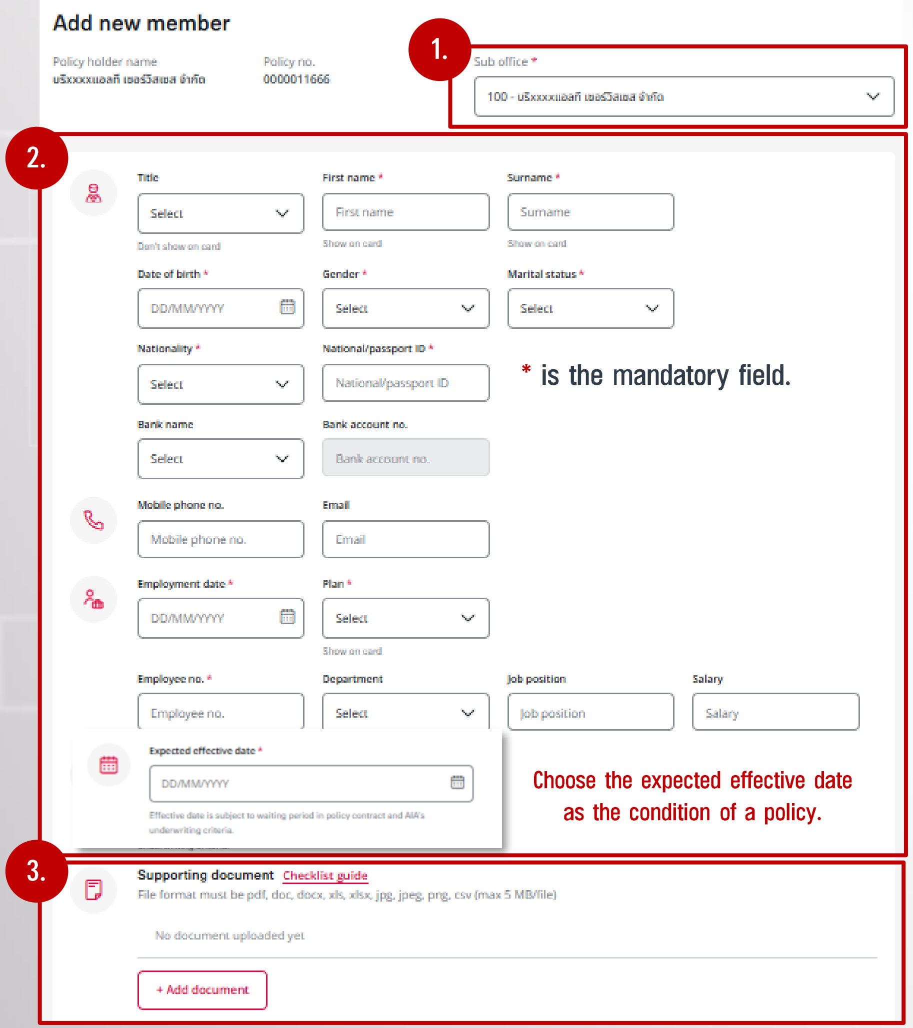
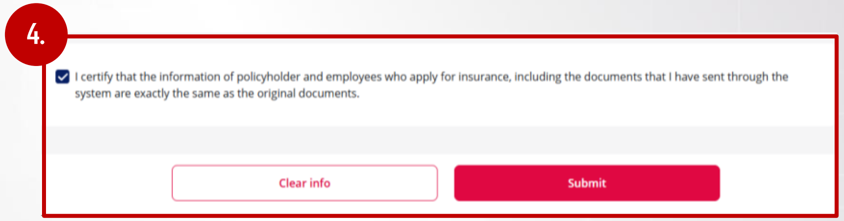
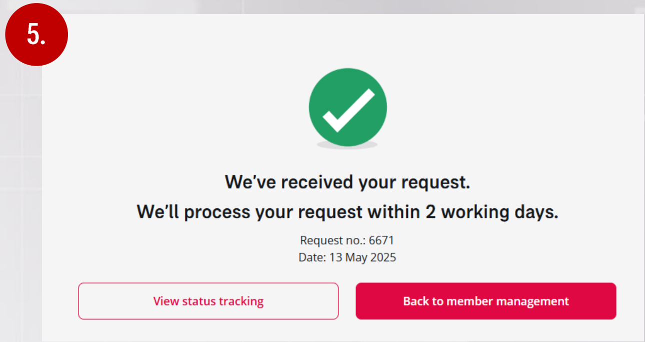
eBenefits > Policy > Member management > Add new members



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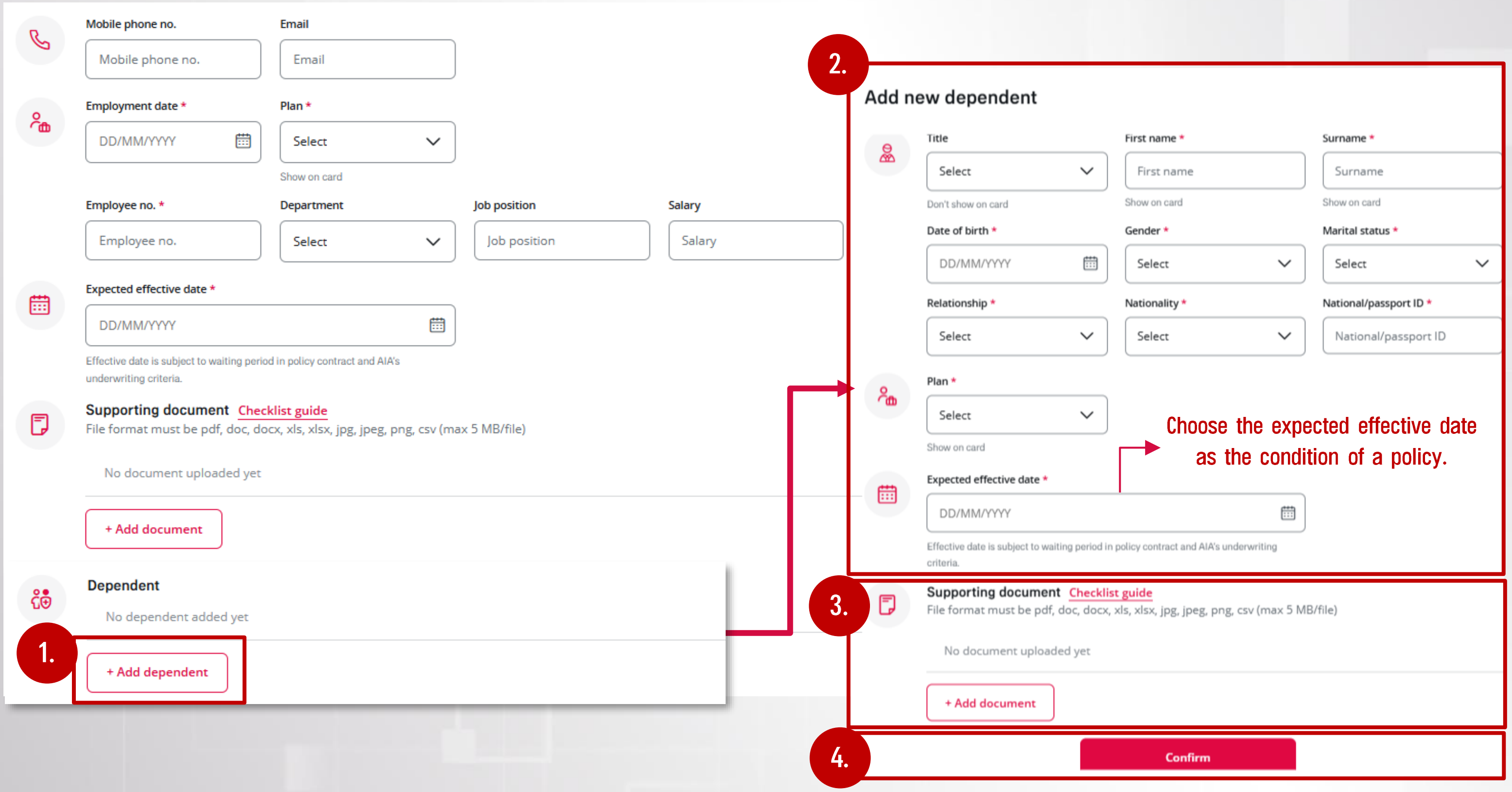
eBenefits > Policy > Member management > Add new members > Add dependents



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

Member

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)

Dependent

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.
- ✓ For spouse: Copy of Marriage Certificate

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

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)

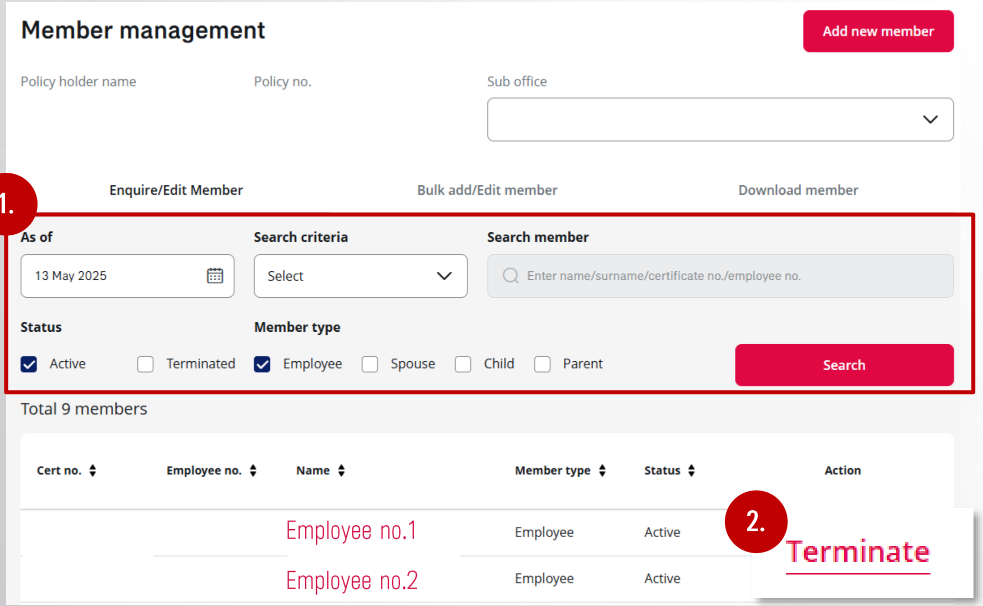
Single Termination on eMember Movement

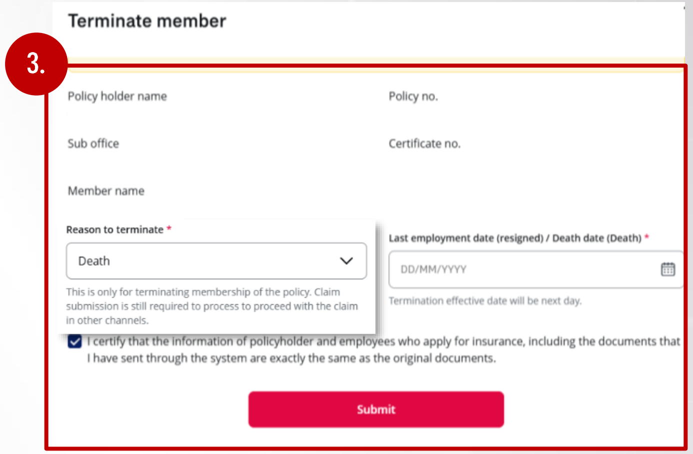
Single termination

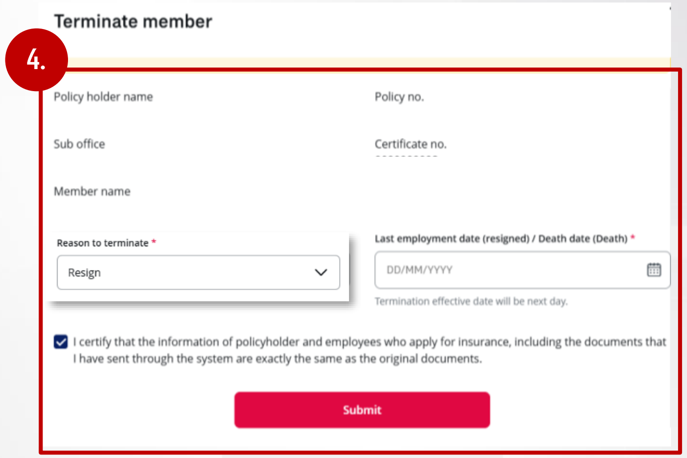
eBenefits > Policy > Member management > Terminate member

When an employee **resigns** or is required to **exit the policy**, you can remove that employee from the policy via Member Management menu as follows:

1. Search name of the member to be deleted.
2. Click **Terminate Member** on the name of the employee to be deleted.







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.

4. 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**.

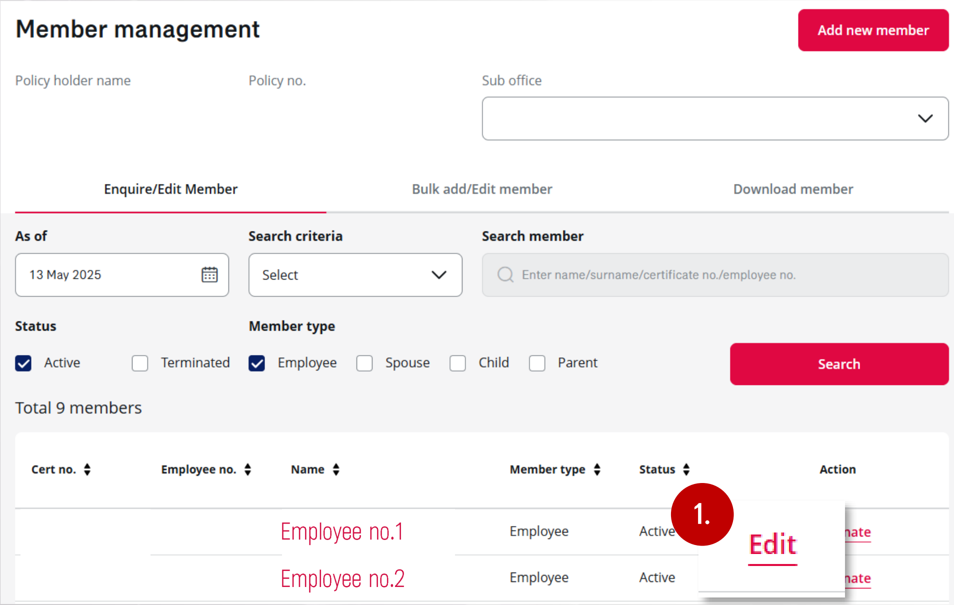
In case the is expanded coverage for dependents, employee's exit can be notified concurrently with that of family member/s.

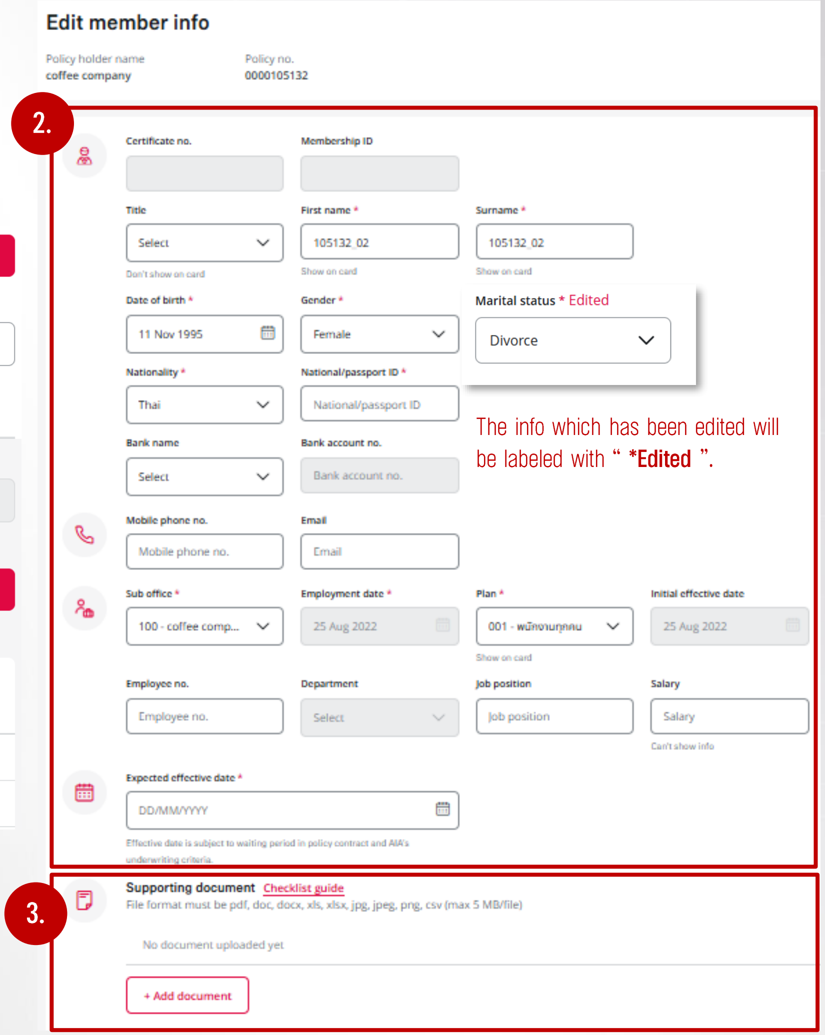
Single Change of Member's Info on eMember Movement

Single Change of Member's Info

eBenefits > Policy > Member management > Edit member info

On **Member Management** menu, you can **edit** current member's information on your own as follows:

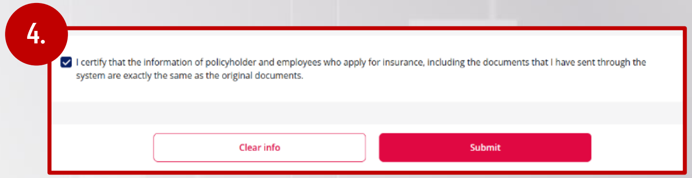




1. Click **Edit** on the name of the selected employee.
2. Edit information you want to change.
3. Upload supporting documents.
4. Click to confirm the information and click **Submit**.

Remark:

- The box that shows **grey color** means that change is not permitted.
- The box that shows * means that information must be filled.
- The box that shows ***Edited** means that information has been edited but still not clicking Submit.
- The box that shows ⚠ sign means Warning.



Required documents for change of Member’s info

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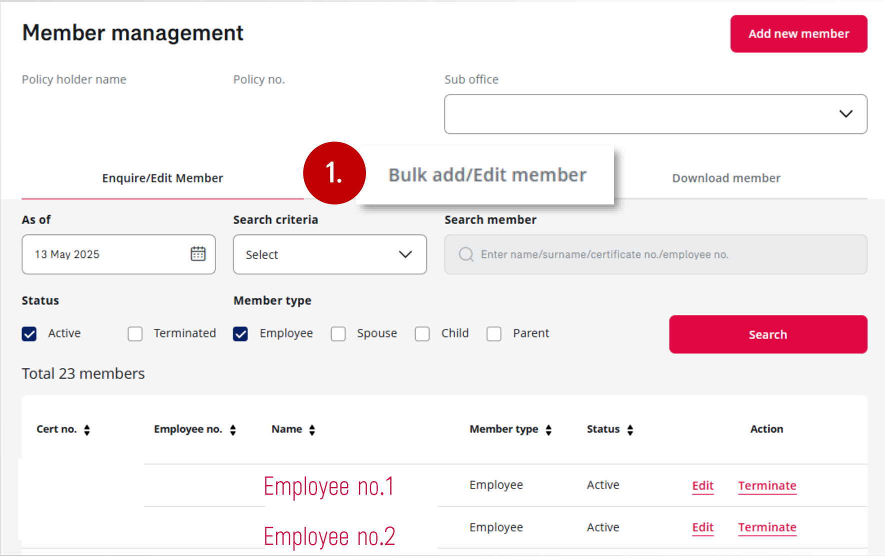
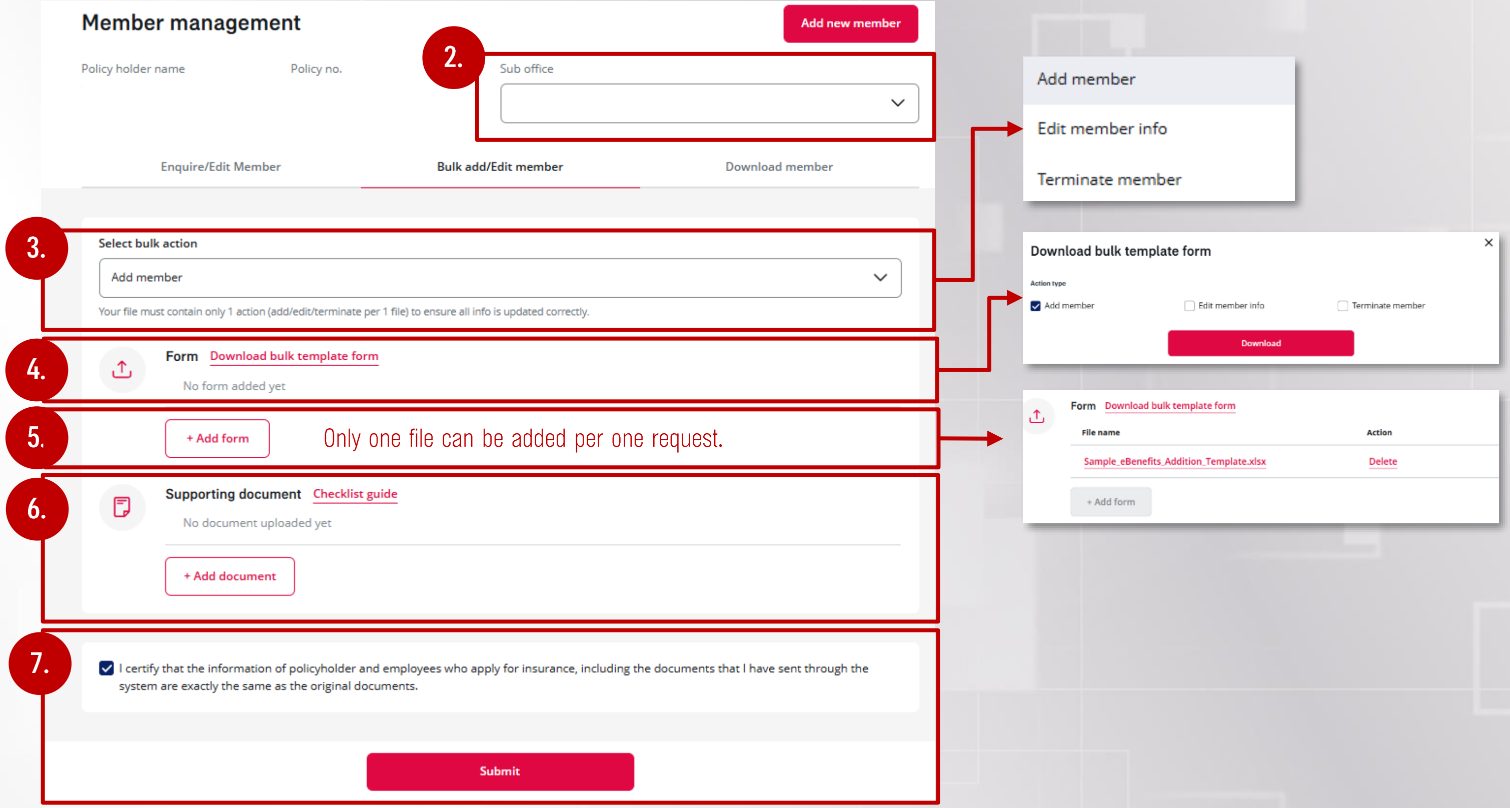
eBenefits > Policy > Member management > Bulk add/Edit member

In addition to notifying member's entry/exit and information change one at a time, you can manage **several members at a single time** by **changing file upload format** as follows:

1. On **Member Management menu**, select **Bulk add/Edit member**.
2. Select sub office.
3. Select bulk action.





4. After selecting bulk action, click **Download bulk template form.**
5. Fill in the Form and click **+ Add Form** to upload Form into the system.
6. Upload supporting documents.
7. Click to confirm truthful information and click **Submit.**

Example of Addition form

บริษัท เอไอเอ จำกัด
เอไอเอ ทาวเวอร์ 2
181 ถนนสุรวงศ์ เขตบางรัก กรุงเทพฯ 10500
โทรศัพท์ 0 2634 8888 โทรสาร 0 2638 7721
AIA.CO.TH

รายงานเพิ่มเติม
REPORT OF ADDITION

นามผู้ถือกรมธรรม์
Name of Policyholder ____________________

(กรุณาแจ้งเลขที่กรมธรรม์ประกันชีวิตกลุ่มของท่านทุกครั้งที่ติดต่อกับบริษัทฯ)

ข้อควรปฏิบัติ ๑. [illegible]
๒. [illegible]

N.B. 1. For Additions, attach Enrollment Forms and list each employee who has been continuously in your employ since the date of employment shown and is at present working full-time and for full pay.
2. 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/เลขประจำตัวพนักงาน/ลำดับที่ Certificate/Employment No.	กรมธรรม์ประกันชีวิตกลุ่มเลขที่ Group Insurance No.	รหัสสาขา/บริษัทในเครือ Sub office no.	รายชื่อสมาชิก Name of Members ชื่อจริง Firstname	นามสกุล Surname	เพศ Sex ชาย = M หญิง = F	สถานภาพสมรส Marital Status โสด = S, แต่งงาน = M หย่า = D	วัน เดือน ปีเกิด (ค.ศ.) Date of Birth (A.D.) วัน D	เดือน M	ปี ค.ศ. Y (A.D.)	เลขที่บัตรประจำตัวประชาชน / หนังสือเดินทาง(สำหรับชาวต่างชาติ) ID Card / Passport No.for foeigner	สัญชาติ Nationality	วันที่เริ่มงาน (ค.ศ.) Employment Date (A.D.) วัน D	เดือน M	ปี ค.ศ. Y (A.D.)	เงินเดือน Annual / Monthly	ตำแหน่ง Position	แผน Plan	ชื่อธนาคาร Bank Name	เลขบัญชี Bank Account	เบอร์มือถือ Mobile no.	อีเมล Email	ผู้ที่อยู่ในอุปการะ Dependent Type C = Child, P = Parent, S = Spouse C = บุตร, P = พ่อ/แม่, S = คู่สมรส	ผู้ได้รับผลประโยชน์ Beneficiary	สำหรับ เอไอเอ For AIA use วันที่มีผลบังคับ Effective Date วัน D	เดือน M	ปี ค.ศ. Y (A.D.)	หมายเหตุ Remarks

หมายเหตุ ในกรณีที่ต้องการความคุ้มครองอย่างต่อเนื่อง กรณีโอนย้ายระหว่างบริษัทในเครือ กรุณาแจ้งชื่อบริษัทเดิม ที่โอนมาพร้อมระบุหมายเลขกรมธรรม์ /ใบรับรองการประกันที่ช่องหมายเหตุ

Ver. 20130501

วันรายงาน
Date of Report

ลายเซ็นผู้มีอำนาจลงนาม
Authorized Signature

Example of Termination form

บริษัท เอไอเอ จำกัด
เอไอเอ ทาวเวอร์ 2
181 ถนนสุรวงศ์ เขตบางรัก กรุงเทพฯ 10500
โทรศัพท์ 0 2634 8888 โทรสาร 0 2638 7721
AIA.CO.TH

รายงานการออกจากงาน
REPORT OF TERMINATION

(กรุณาแจ้งเลขที่กรมธรรม์ประกันชีวิตกลุ่มของท่านทุกครั้งที่ติดต่อกับเอไอเอ)

ข้อควรปฏิบัติ : ต้องรายงานการสิ้นสุดการทำงานให้เอไอเอทราบทันที หรืออย่างช้าวันรุ่งขึ้น และควรเรียกบัตรสิทธิพิเศษประกันภัยกลุ่มคืนจากสมาชิกที่ลาออก เพื่อป้องกันการนำบัตรไปใช้

Recommendation : The termination of employement must be reported to AIA immediately or at least the following day.The Group Privilege Card should be returned to AIA in order to prevent the use of the card.

นามผู้ถือกรมธรรม์
Name of Policyholder ____________________

กรมธรรม์ประกันชีวิตกลุ่มเลขที่
Group Insurance No. ____________________

ใบรับรองเลขที่ Certificate number	รายชื่อสมาชิก / คู่สมรส / บุตร Name of Member / Spouse / Child		เหตุผลที่ออก Reason	วันสุดท้ายของสัญญาจ้าง - กรณีลาออก วันที่เสียชีวิต - กรณีเสียชีวิต Last employment date - Resign Death date - Death			หมายเหตุ Remarks
	ชื่อจริง Firstname	นามสกุล Surname	ลาออก (Resign) = T02 เสียชีวิต (Death) = T04	วัน D	เดือน M	ปี ค.ศ. Y (A.D.)	

หมายเหตุ *ในกรณีที่ต้องการความคุ้มครองอย่างต่อเนื่อง กรณีโอนย้ายระหว่างบริษัทในเครือ กรุณาแจ้งชื่อบริษัทใหม่พร้อมระบุหมายเลขกรมธรรม์ / ใบรับรองเลขที่ ตรงช่องหมายเหตุ*

FC00

วันรายงาน
Date of Report

ลายเซ็นผู้มีอำนาจลงนาม
Authorized Signature

Ver. 20240801

[AIA - INTERNAL]

Caution when filling Termination Form

- Incorrect file type, attached file is not xlsx, xls.
- Not indicate information on certification number, real name and surname, end date of employment contract/date of death and exit reasons of the member.
- Repeated names of members on the uploaded file.
- Incorrect certification number: Please enter zero in front to make 10 digits.
- Incorrect certification number. Figures must not exceed 10 digits.

Example of Change form

บริษัท เอไอเอ จำกัด
เอไอเอ ทาวเวอร์ 2
181 ถนนสุรวงศ์ เขตบางรัก กรุงเทพฯ 10500
โทรศัพท์ 0 2634 8888 โทรสาร 0 2638 7721
AIA.CO.TH

รายงานการเปลี่ยนแปลง
REPORT OF CHANGE

(กรุณาแจ้งเลขที่กรมธรรม์ประกันชีวิตกลุ่มของท่านทุกครั้งที่ติดต่อกับบริษัทฯ)

นามผู้ถือกรมธรรม์
Name of Policyholder ____

ข้อควรปฏิบัติ ๑. การเพิ่มเติม-ให้แนบแบบสมัคร และรายชื่อสมาชิกผู้มีสิทธิเข้าร่วมแต่ละคนที่ได้ปฏิบัติงาน ติดต่อกันมาดังปรากฏตามวันที่เข้าทำงาน และปัจจุบันกำลังปฏิบัติงานเต็มเวลา เพื่อรับเงินค่าแรงเต็ม

๒. ถ้ามิได้รับรายงานเพิ่มเติมภายในระยะเวลาของการมีสิทธิภายใต้กรมธรรม์ของท่าน 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.

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

ใบรับรอง/ เลขประจำตัวพนักงาน/ ลำดับที่ Certificate/ Employment No.	กรมธรรม์ประกันชีวิตกลุ่มเลขที่ Group Insurance No.	รหัสสาขา/บริษัทในเครือ Sub office no.	วันที่เปลี่ยน Date of Change			เหตุผลที่เปลี่ยน Reason of Change	เปลี่ยนแปลง Change		หมายเหตุ Remarks
			วัน D	เดือน M	ปี ค.ศ. Y (A.D.)		จาก From	เป็น to	

หมายเหตุ *ในกรณีที่ต้องการความคุ้มครองอย่างต่อเนื่อง กรณีโอนย้ายระหว่างบริษัทในเครือ กรุณาแจ้งชื่อบริษัทเดิม ที่โอนมาพร้อมระบุหมายเลขกรมธรรม์ /ใบรับรองการประกันที่ช่องหมายเหตุ*

Ver. 20130501

____
วันรายงาน
Date of Report

____
ลายเซ็นผู้มีอำนาจลงนาม
Authorized Signature

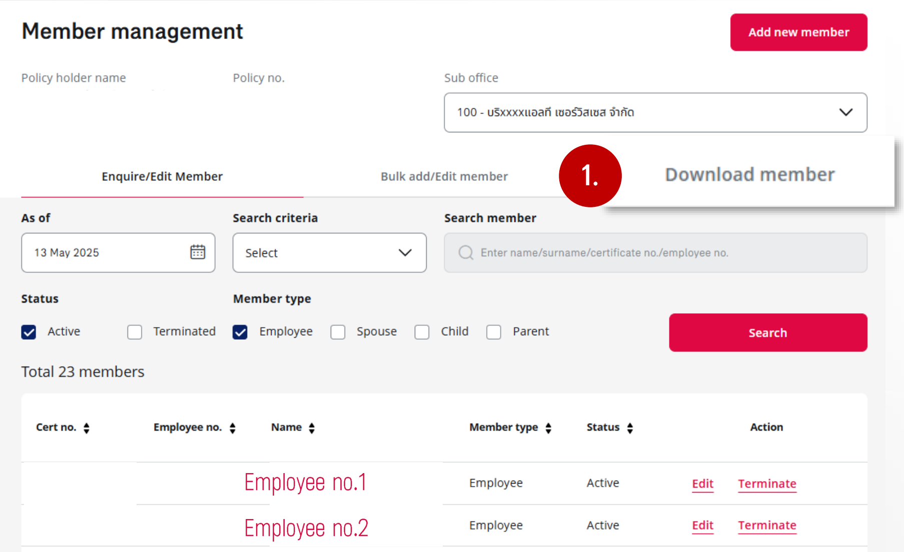
[AIA – INTERNAL]

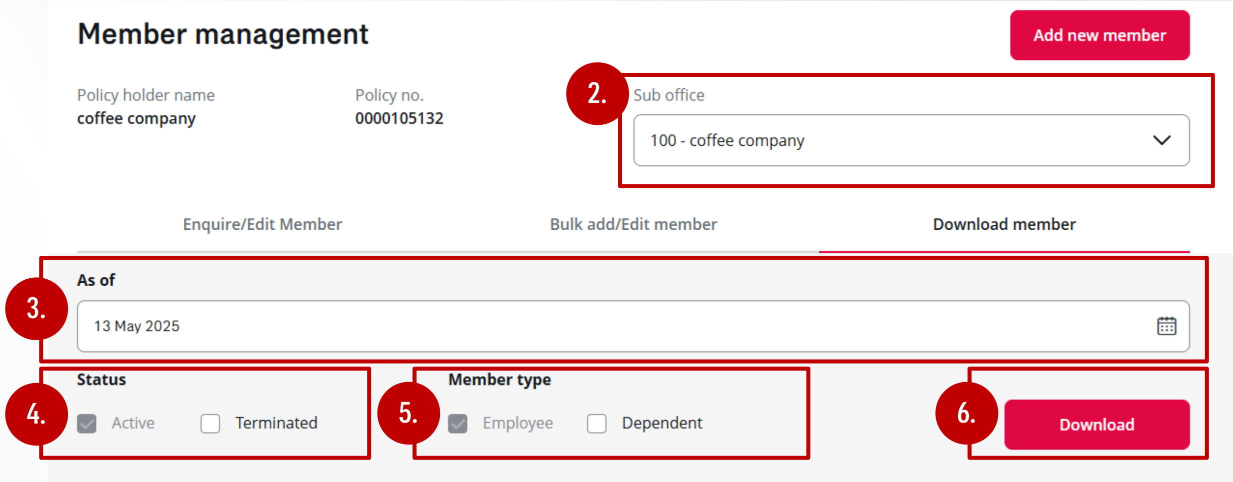
Member List Download

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:





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**."

In case of advance transaction, selected period must cover such time.

Example of Member List File

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ฝ่ายประกันธุรกิจองค์กร

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.

Cert. No.	Name	Dep	Membership ID	Employee No	Gender	M/S	Date of Birth	Age	YEARLY RENEWABLE TERM LIFE						ACCIDENTAL DEATH AND DISABLEMENT (CON)					
									Plan	Coverage Type	Eff Date	Ins Amt	Uw/Sts	Product Status	Plan	Coverage Type	Eff Date	Ins Amt	Uw/Sts	Product Status
		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY	1 May 2025	2,000.00	A	Terminated	002	MEMBER ONLY	1 May 2025	200,000.00	A	Terminated
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Male	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active
		Member			Female	Married	11 Nov 1995	29	002	MEMBER ONLY	25 Aug 2022	2,000.00	A	Active	002	MEMBER ONLY	25 Aug 2022	200,000.00	A	Active

Underwriting Status
A - Approved

eMember Movement Status Tracking

eMember Movement Status Tracking

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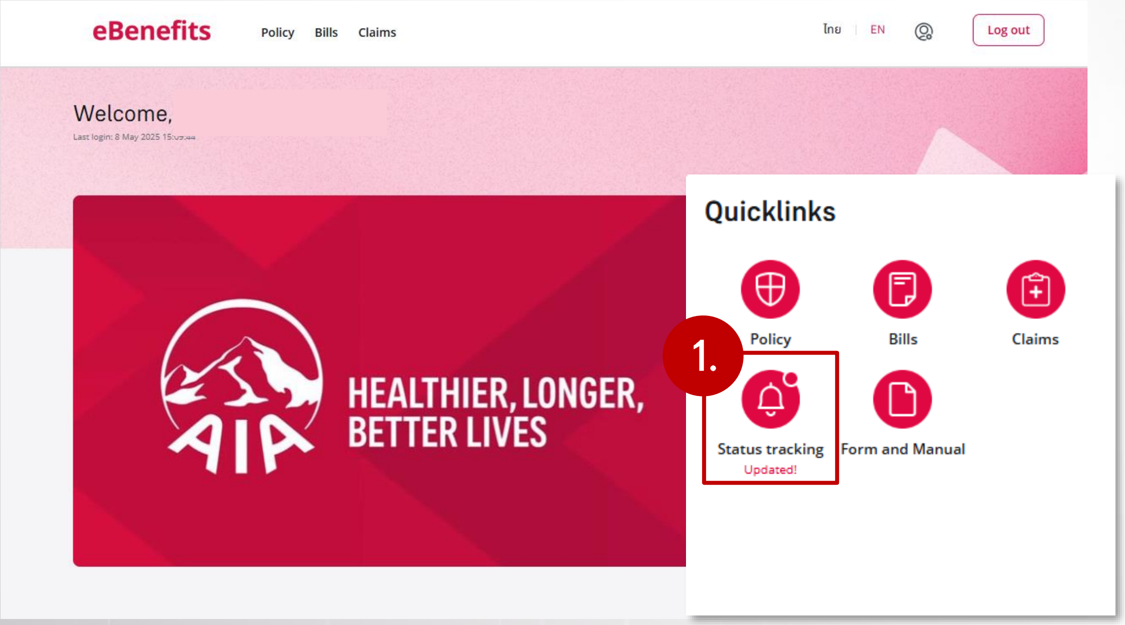
eBenefits > Status tracking

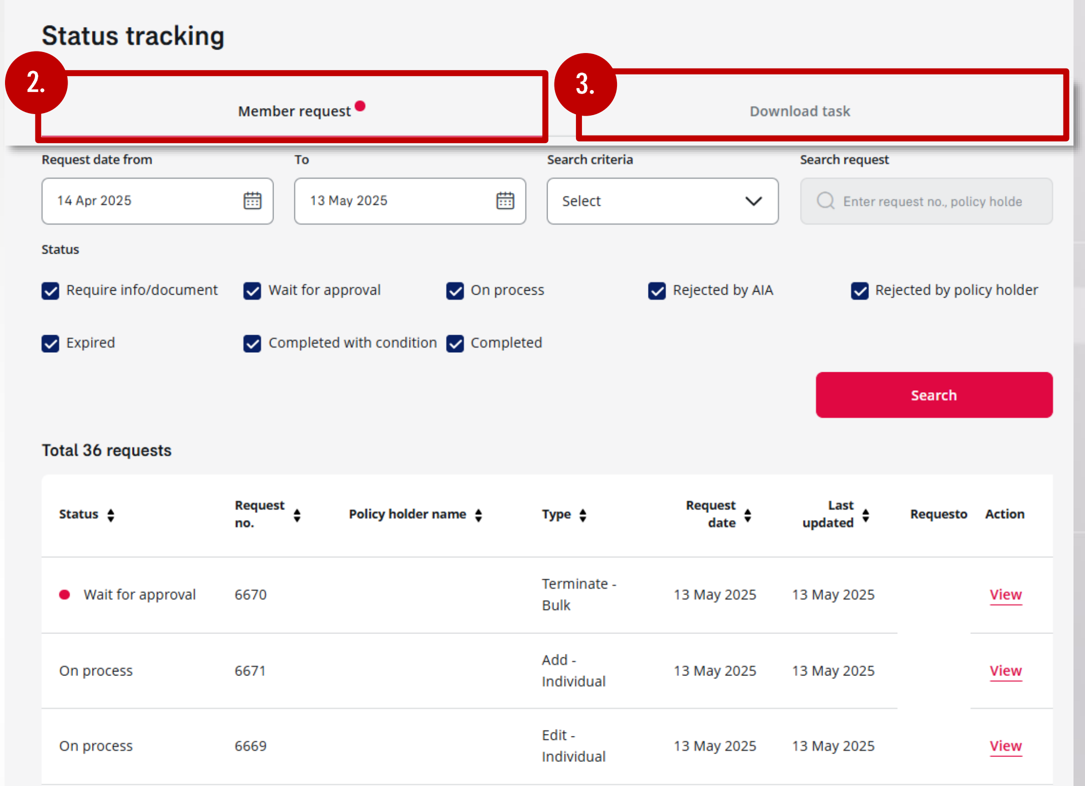
After requesting entry/exit/change of employees or document download, you can track proceeding status in eBenefits system as follows:

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.



eMember Movement Status Tracking

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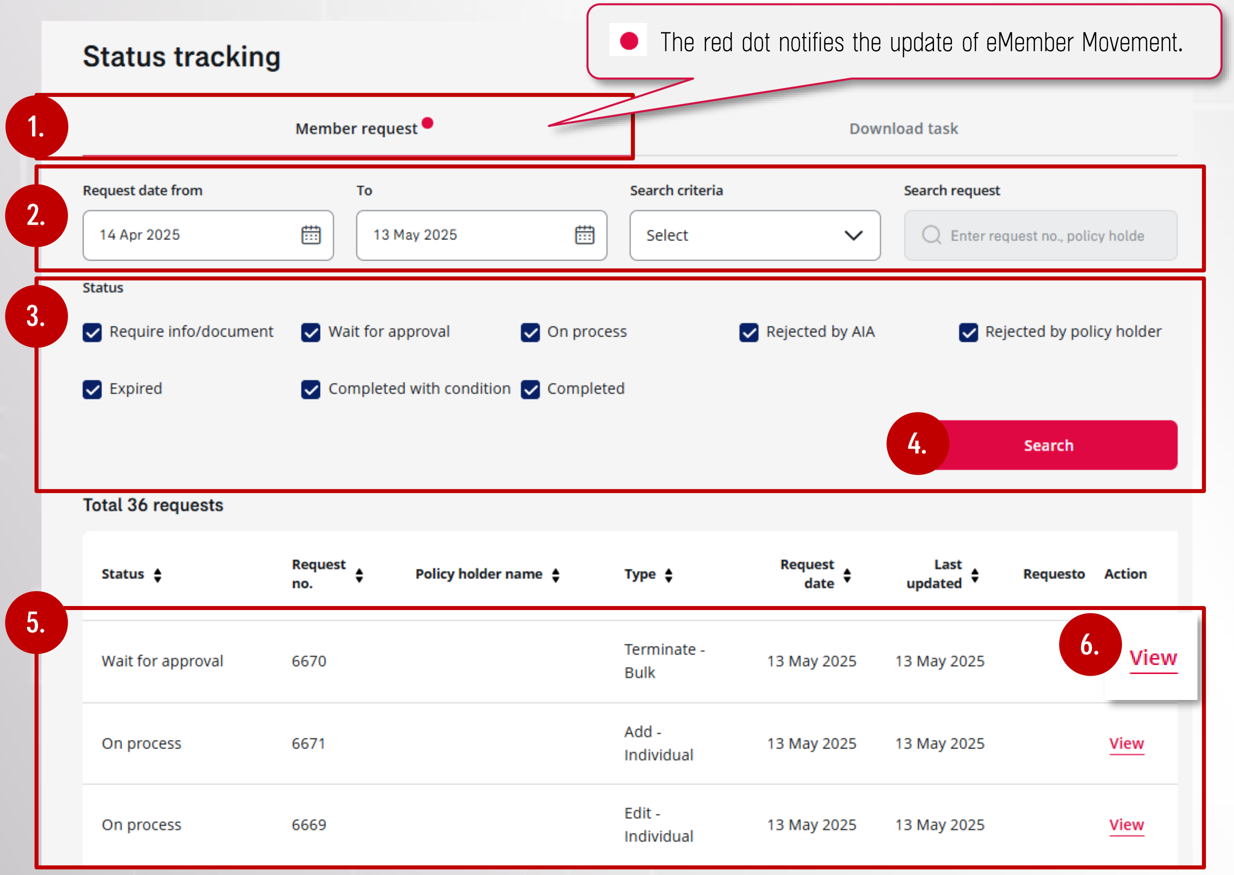
ฝ่ายประกันธุรกิจองค์กร

eBenefits > Status tracking



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.

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

1. **Status tracking no. 6657** Bulk add new member

Request status	Request no.	Request date
On process	6657	8 May 2025
Policy holder name	Policy no.	Sub office

2. **Status history**

Status	By	Action date	Remarks
On process		8 May 2025 15:26	See more
Submitted request		8 May 2025 15:26	-

3 **Form**

Bulk action type	File name
Add	

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

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Status	Definition
Require info/document	AIA requests additional documents or information.
Wait for approval	Awaiting approval from the policyholders.
On process	AIA is processing the requests.
Rejected by AIA	Request rejected by AIA.
Rejected by policyholders	Request rejected by policyholders.
Expired	Request has expired and needs to be resubmitted.
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.

Complete with conditions – Request sender must submit additional requests for failure cases.

How to track download status

CORPORATE SOLUTIONS
ฝ่ายประกันธุรกิจองค์กร

eBenefits > Download track

Status tracking

Member request | 1. Download task

Total 2 tasks

2.

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

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

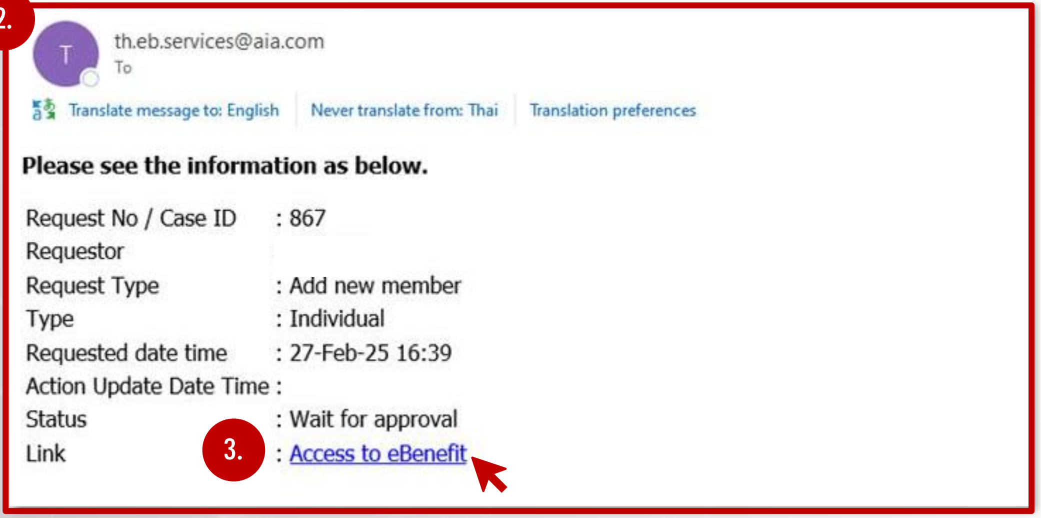
1. Select **Download task** to view all downloaded documents.
2. The list of the created documents and the details will be shown as follows:
   - **Status** is used to view download status.
   - **Task name** is used to view download type.
   - **Task description** bar is used to view details of downloaded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

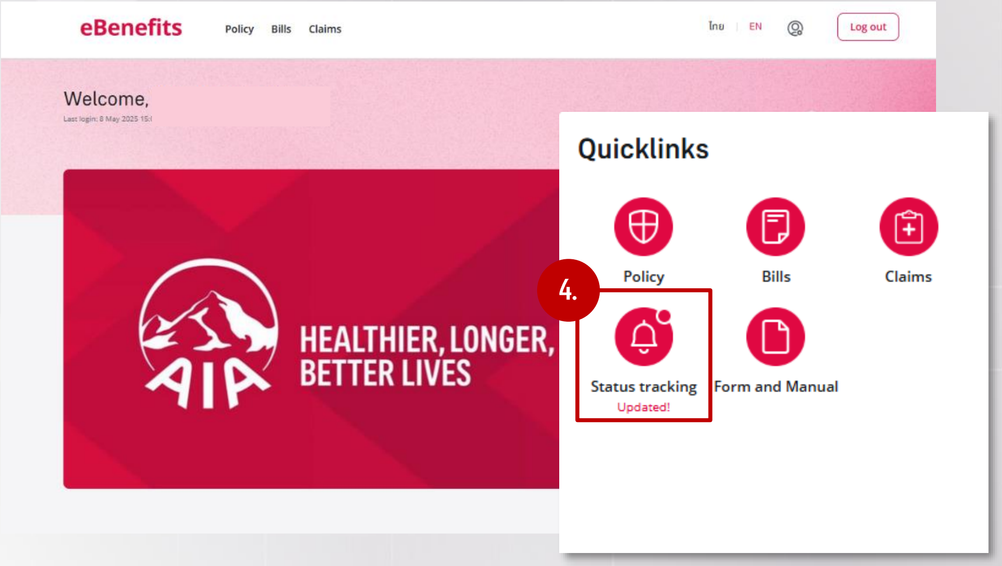
eMember Movement Approval

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:





1. The policyholders will receive an approval request email from th.eb.services@aia.com. The email subject will include the request number, type of transaction, and company name.
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

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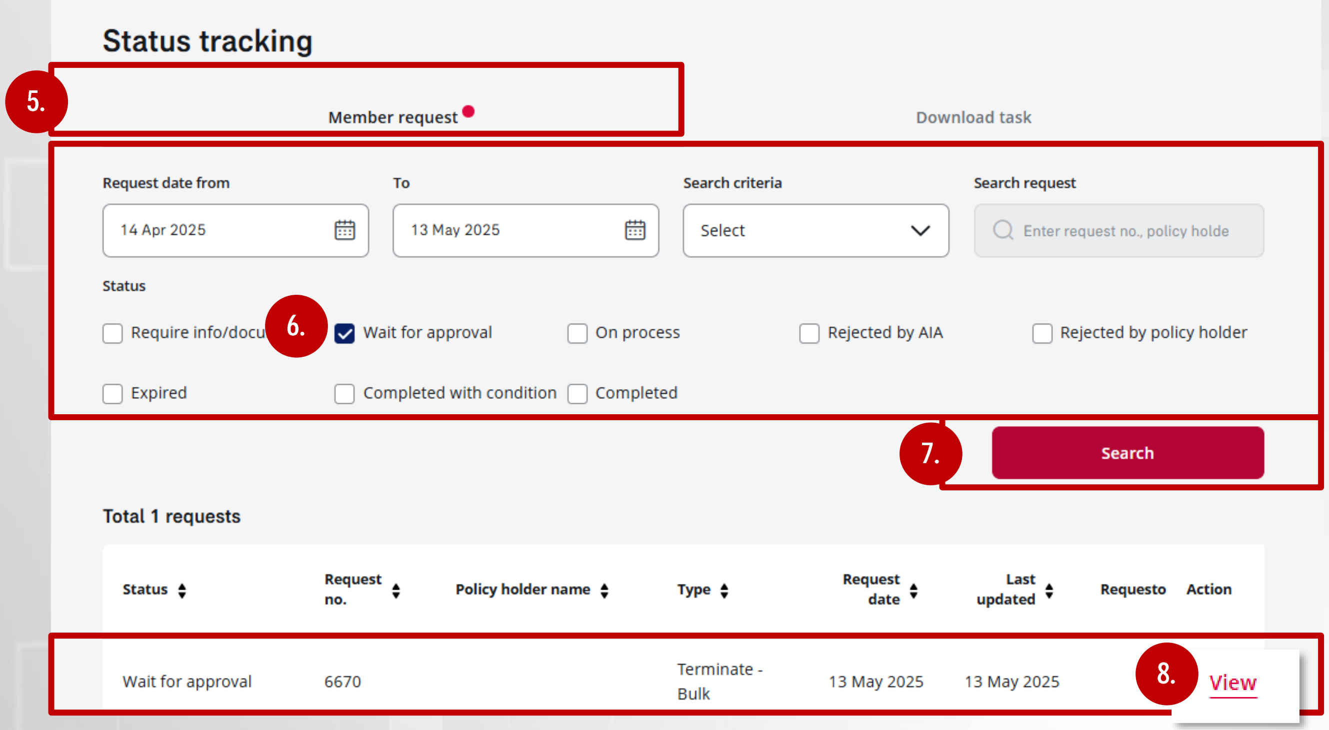
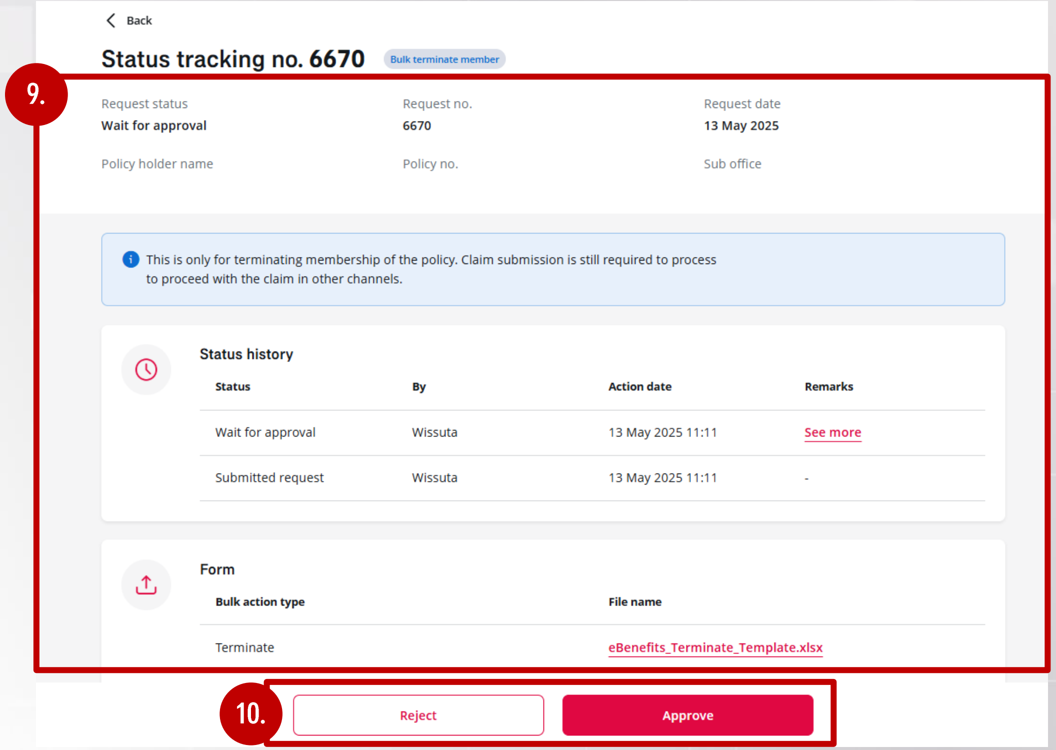
eBenefits > Status tracking > Waiting for approval





5. Select Member request.
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.

The approval requests will expire in 15 days.

How to check Payment Status and Download eBill

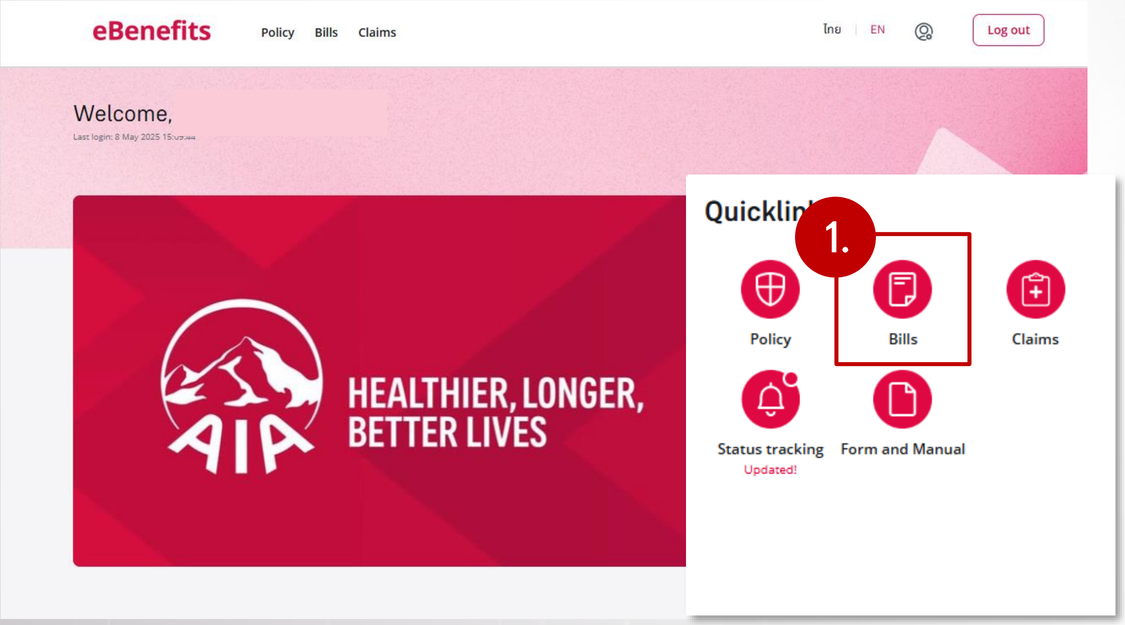
How to check Payment Status and Download eBill

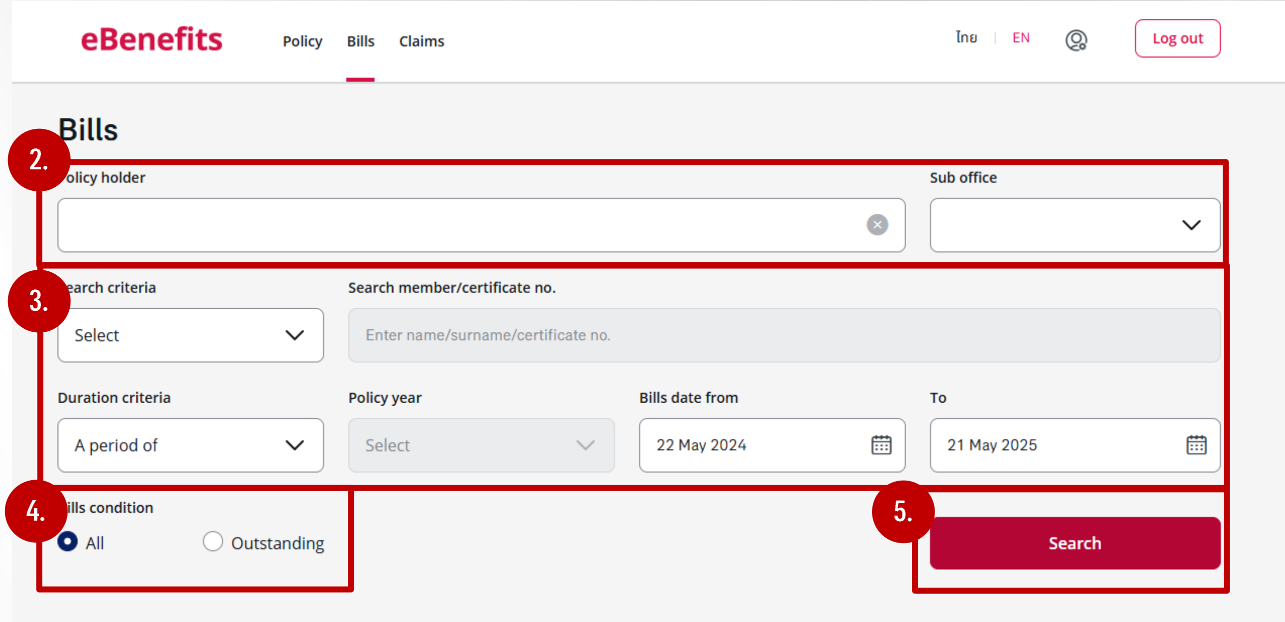
CORPORATE SOLUTIONS
ฝ่ายประกันธุรกิจองค์กร

eBenefits > Bills

You can check premium payment status and download bills from **Bills** menu as follows:

1. Select **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**





How to check Payment Status and Download eBill

CORPORATE SOLUTIONS
ฝ่ายประกันธุรกิจองค์กร

eBenefits > Bills

Examples for demonstrating premium details and downloading eBill

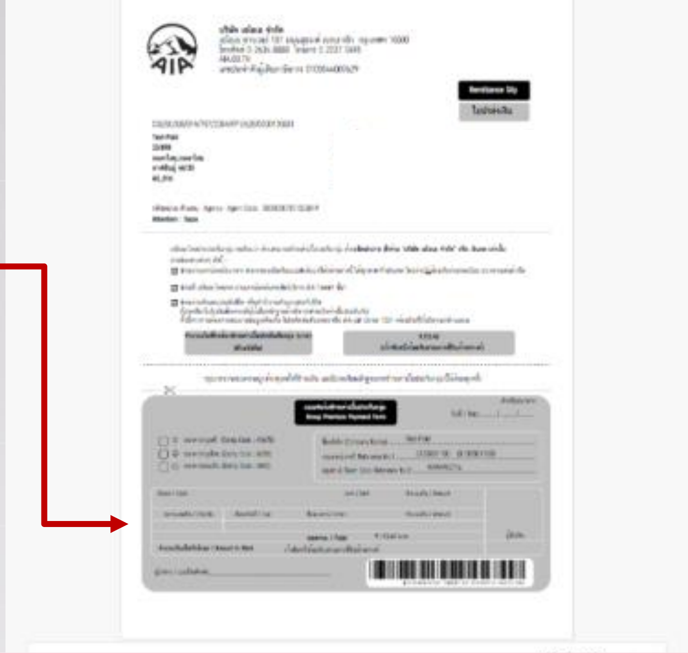
Bill period	Bill number	Product	Total billed amount	Paid amount	Current outstanding amount	Bill issue date	Bill paid date	Member details	eBill
		Details	15,055.00	15,055.00	0.00	22 Nov 2024	30 Nov :	Details	Download
		Total	15,055.00	15,055.00	0.00				

Expand

Bill number	Product	Total billed amount	Paid amount	Current outstanding amount	Bill issue date	Bill paid date	Member details	eBill
	Detail		5,055.00	0.00	22 Nov 2024	30 Nov 2024	Details	
	YEARLY RENEWABLE TERM LIFE	1,650.00	1,650.00	0.00				
	ACCIDENTAL DEATH AND DISABLEMENT (CON)	1,350.00	1,350.00	0.00				
	TOTAL AND PERMANENT DISABILITY	170.00	170.00	0.00				
	SIMPLIFIED HOSPITAL AND SURGICAL	11,885.00	11,885.00	0.00				

Collapse

Click Expand to view the details of the coverage and premium.



- When clicking eBill **Download**, you will receive Zip file.
- The file will consist of
  - Bill document file.
  - Excel file showing premium details of each member.
- eBill will appear for download after Group Insurance Team has verified all attached documents.
- Payment status can be checked from item **Paid amount** and **Current outstanding amount**.

BillReport_0000130801_202405A000...
PremiumStatementDetail_0000130...

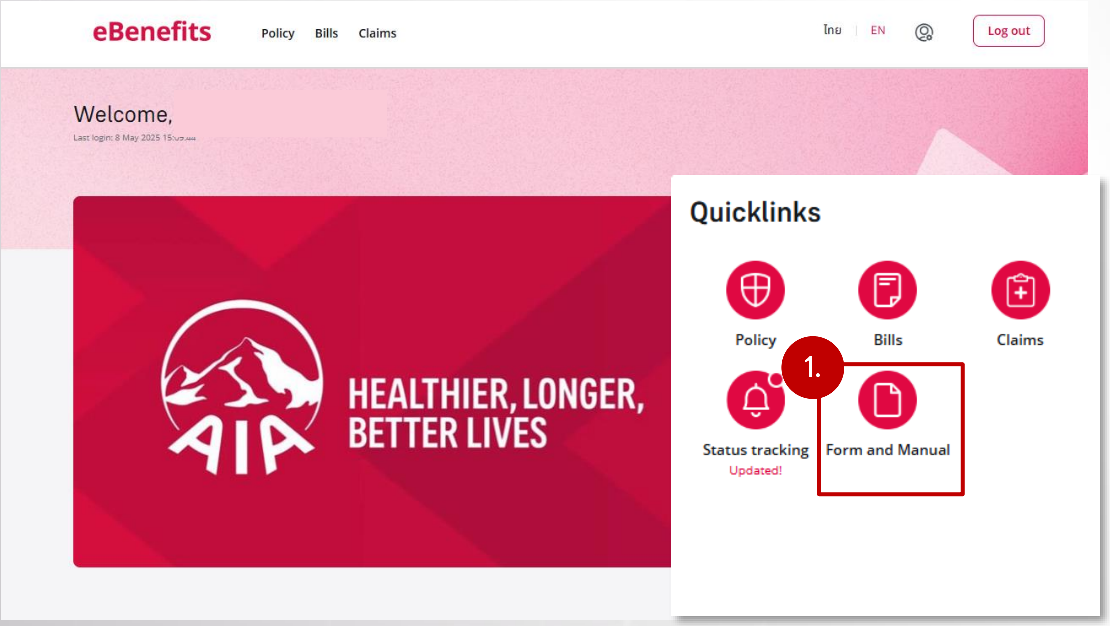
Form and Manual

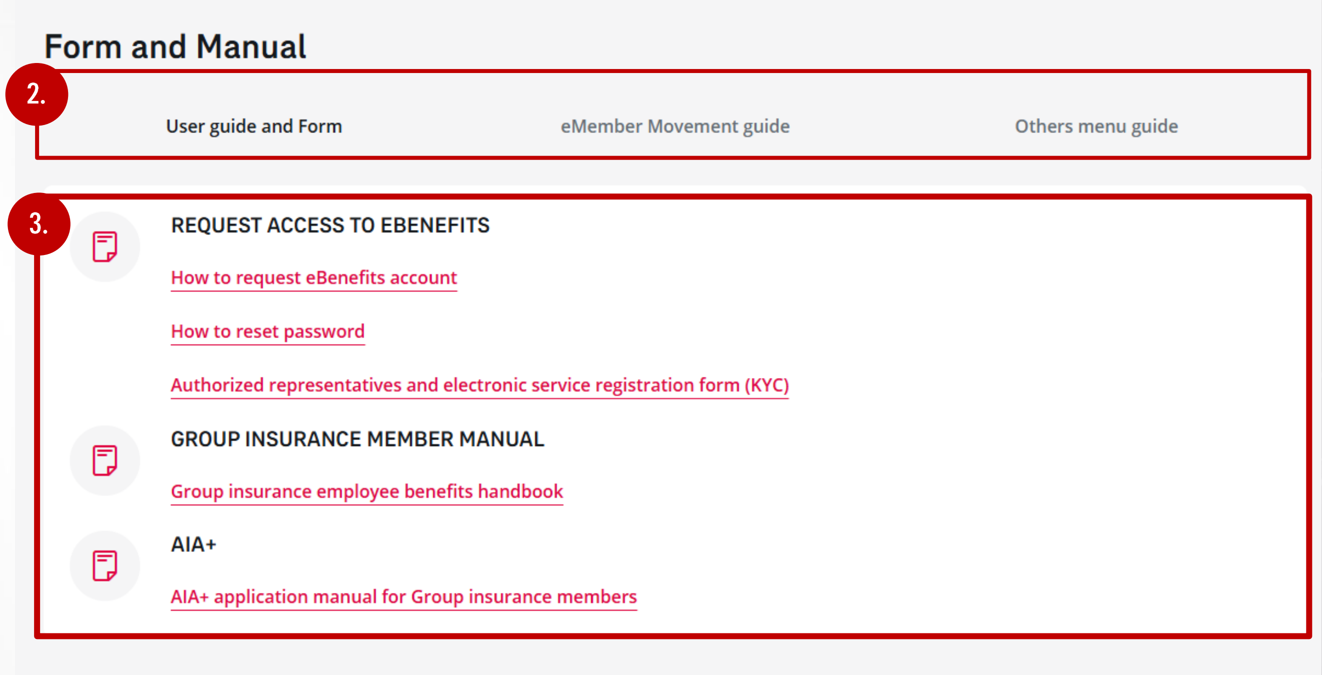
Form and Manual

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.





THANK YOU