



## HELP GUIDE

**nib adviser access** gives you the information you need to support and manage your nib client policies on the go. Quicker. Easier. 24/7.

Use this help guide if you need assistance with registering for the first time, logging in, and using the different features.

# nib

## Welcome to nib adviser access

**nib adviser access** is designed to give you the information you need to support and manage your nib client policies on the go. So no matter where you are and when you need access, you can easily search and obtain information about your clients in just a few clicks, 24/7.

This portal will not only let you access up-to-date data, it will also give you most of the same information your clients can access through **my nib**, provide you with weekly client activity reports and give you the ability to download your client register details.

**nib adviser access** is another step toward strengthening our promise of bringing you a 'world of new benefits'. It means less administration effort and more time for you to spend talking to clients.

We look forward to continuing nib's journey into a 'world of new benefits' with you.

The team at nib

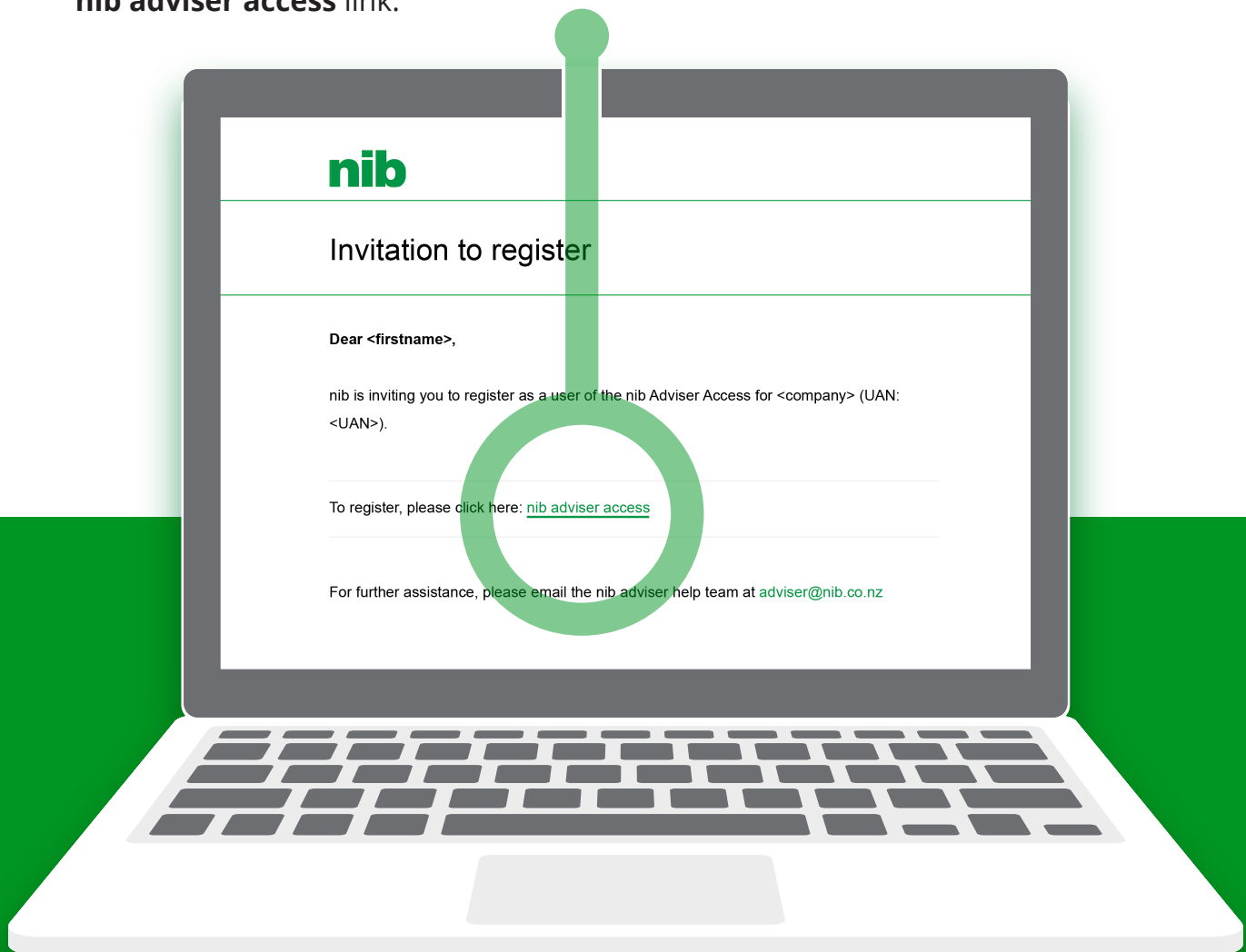
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## Registering for the first time

### 1a In your email inbox

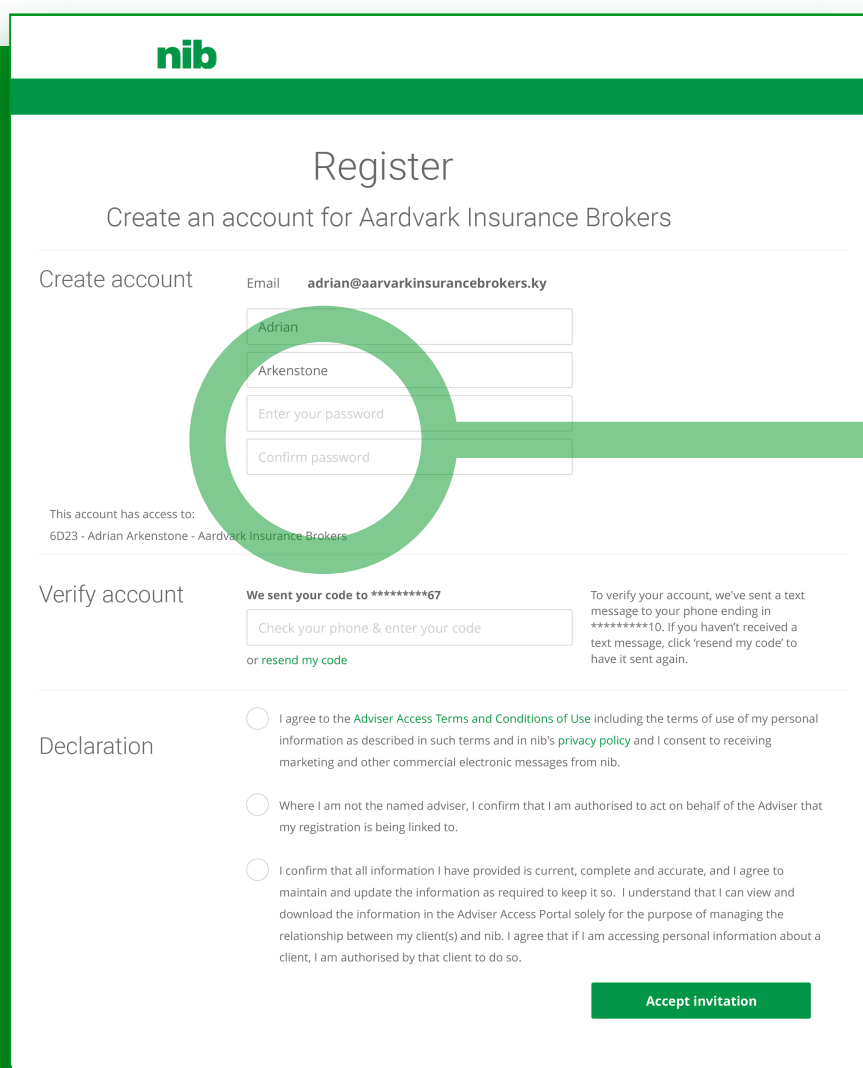
Please open the registration email that you received from nib and click on the **nib adviser access** link:



This will take you to the webpage where you can register for the portal.

## 1b Adviser registration webpage

From the email link, you'll be taken to the nib adviser access registration page. You'll see this form to choose your password:



1c

Your name and email address are entered automatically.

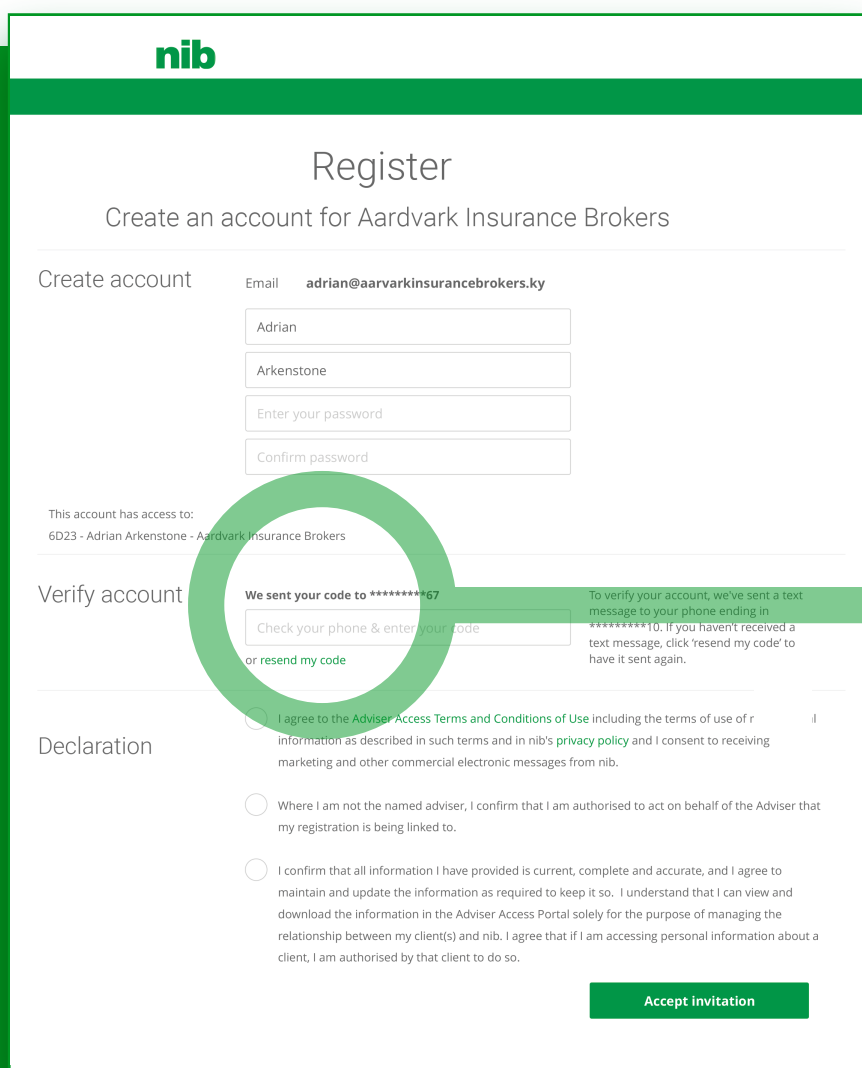
Enter a **password** here.

A secure password must have:

- 12 letters or more
- at least one lowercase letter
- at least one uppercase letter
- at least one number

## 1d Check your mobile phone for a message

As soon as you visit the webpage, nib will send a text message to the mobile phone you've given us. Check your phone to view the message.



## 1e

A text message has been sent to your phone with a unique security code.

Enter the code here.

After you enter the code, please take time to read the terms and conditions.

Click all three **tick boxes** to confirm that you have read them.

Click the **Accept invitation** button.



**Congratulations, you have now successfully registered to nib adviser access!**

**Completing the registration will take you to the login page.**

## Where is the login page?

### 2a Go to the nib advisers page ([adviser.nib.co.nz](https://adviser.nib.co.nz))

This is a page with information and resources for advisers.

(You can also access this page by clicking the 'For advisers' link at the top of the website [www.nib.co.nz](https://www.nib.co.nz).)



## nib adviser access

Welcome!

nib adviser access gives you the information you need to support and manage your nib client policies on the go.

No matter where you are and when you need access, you can easily search and provide information to your clients in just a few clicks.

[Log in to nib adviser access](#)

[Read the help guide](#)

[Request an invitation](#)



### 2b Click the **Log in to nib adviser access** button.

You can also find buttons here that link to the downloadable **help guide**, and a button to **request an invitation** if you have not yet received one.

**2c** From the advisers page, you will be taken to the login page.

adviser@nib.co.nz or call 0800 238 642'." data-bbox="61 278 532 698"/>

**2d**


Enter your email and password details.

Click the **Log in** button.

Clicking the Log In button will take you to nib adviser access.



You are now logged in to nib adviser access.



Hi Adrian! | [Log out](#)

Adviser documents


Member documents

Public documents

You are logged in as:


6D23 - Adrian Arkenstone - Aardvark Insurance Brokers

Agent Policy Listing

 APL-230318\_Adrian.csv (23/03/2018)

Download

Weekly Adviser Policy Report

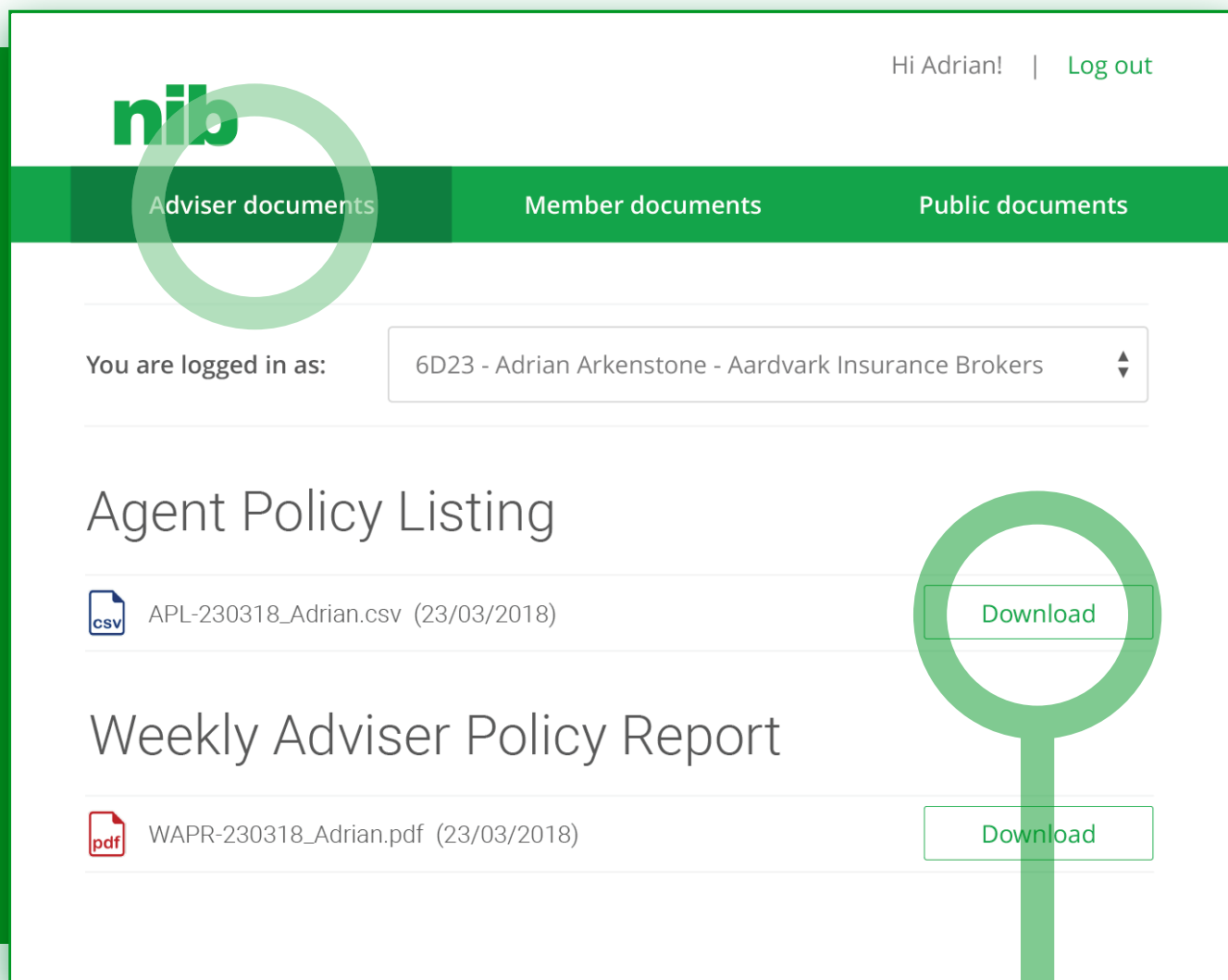
 WAPR-230318\_Adrian.pdf (23/03/2018)

Download



## Downloading the Agent Policy Listing

**3a** In nib adviser access, go to the Adviser documents tab.




Hi Adrian! | [Log out](#)

**nib**


Adviser documents | Member documents | Public documents

You are logged in as: 6D23 - Adrian Arkenstone - Aardvark Insurance Brokers


### Agent Policy Listing

 APL-230318\_Adrian.csv (23/03/2018) [Download](#)

### Weekly Adviser Policy Report

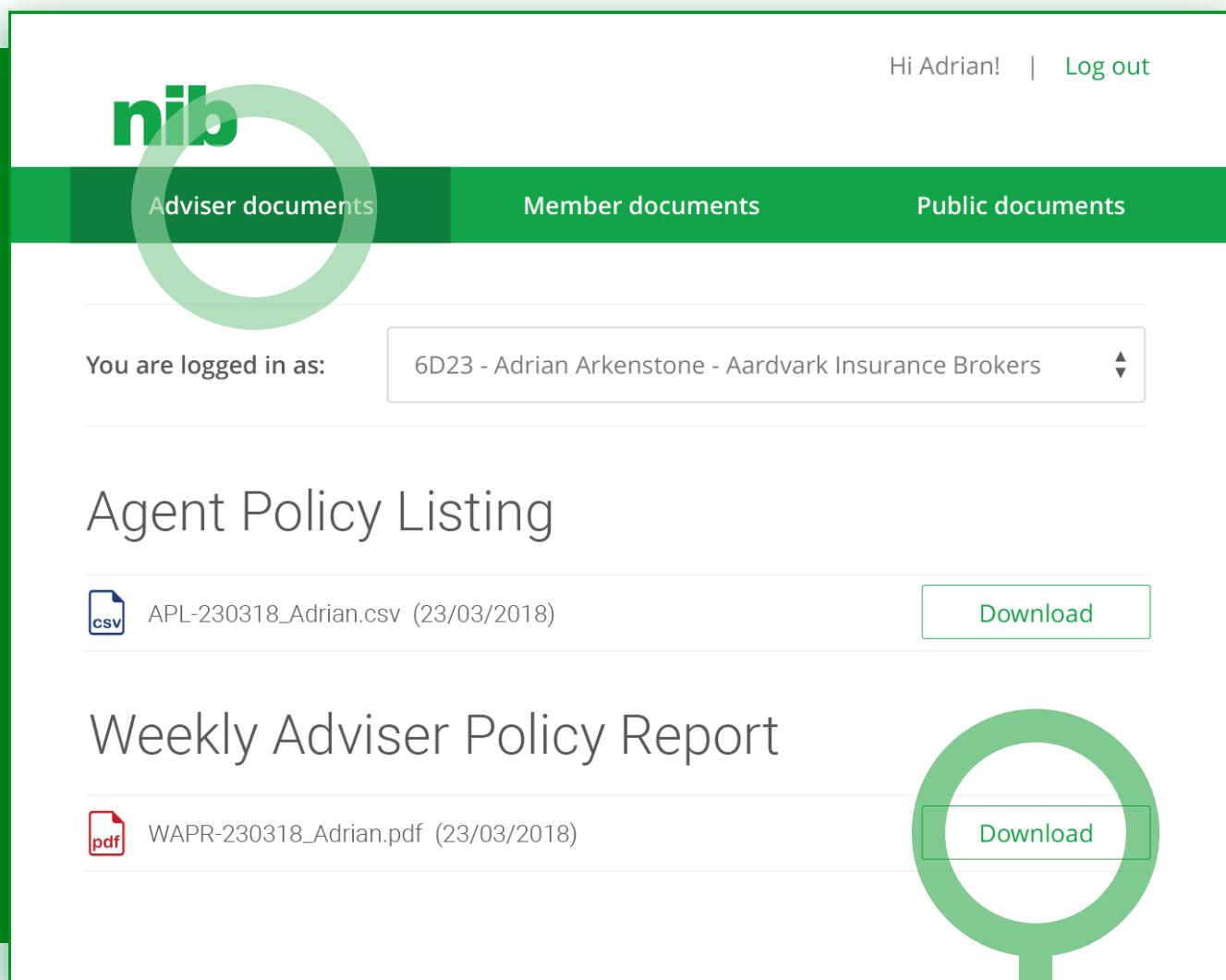
 WAPR-230318\_Adrian.pdf (23/03/2018) [Download](#)

**3b** In the Agent Policy Listing section, click the **Download** button.

 Your web browser will download the CSV file.  
You can open it in Excel or in another application on your computer or mobile.

# Downloading the Weekly Adviser Policy Report

**4a** In nib adviser access, go to the **Adviser documents** tab.



**4b** In the Weekly Adviser Policy Report section, click the **Download** button.

 Your web browser will download the PDF file.

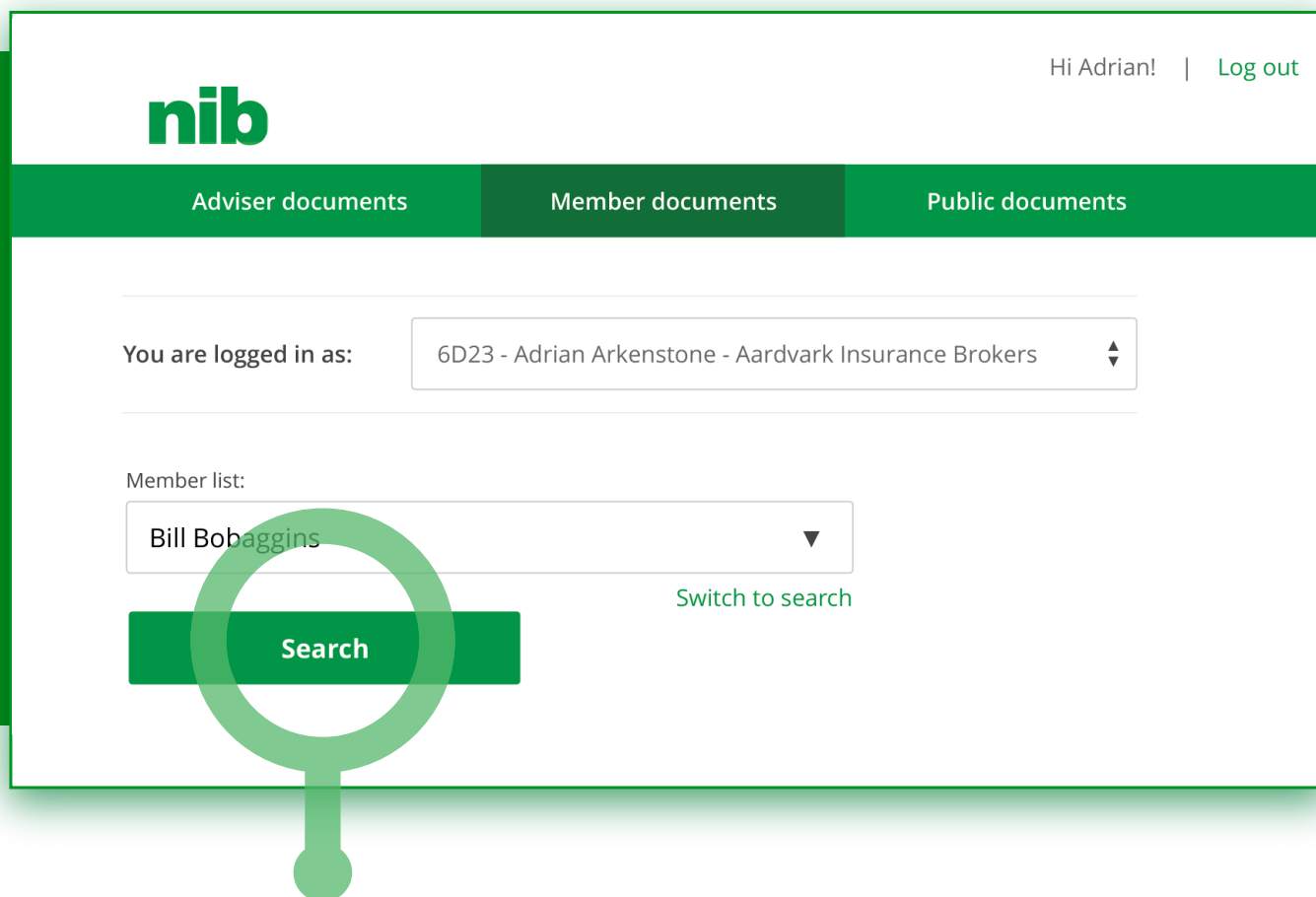
You can open it in Adobe Acrobat or in another application on your computer or phone.

## Searching for a member (list search)

**5a** In nib adviser access, go to the **Member documents** tab.

All members' names are shown in the member list.

(To search by policy number or to type a name, click **Switch to search** to change the search technique - see more on page 13.)



The screenshot shows the nib adviser interface. At the top right, it says "Hi Adrian! | [Log out](#)". Below this is a navigation bar with three tabs: "Adviser documents", "Member documents" (which is selected), and "Public documents". Under the "Member documents" tab, there is a section "You are logged in as:" followed by a dropdown menu showing "6D23 - Adrian Arkenstone - Aardvark Insurance Brokers". Below this is a "Member list:" section with a dropdown menu showing "Bill Bobaggins". To the right of the dropdown menu is a link that says "Switch to search". At the bottom of the "Member list" section is a green button labeled "Search". A large green magnifying glass is overlaid on the "Search" button and the "Member list" dropdown menu.

**5b** To show a member's information, select their name from the list and click the **Search** button.

Member list:

Bill Bobaggins

[Switch to search](#)

**Search**

## Contact details available for Bill Bobaggins

Member phone	098739264 (Home, policy 00213346) 0213847174 (Mobile, policy 00213346) 02723810347 (Mobile, policy 00178223)
Member email	bill@bobaggins.co.nz (policy 00213346) bill288@vodafone.co.nz (policy 00178223)
Policy address	37 Underwood Close, Parnell, Auckland 1037 (policy 00213346) 933 Figglesticks Crest, Huntly 2008 (policy 00178223)

## 32 correspondence documents available for Bill Bobaggins

CORRESPONDENCE TYPE	DATE	POLICY	DOWNLOAD
Rate change letter	23/03/2018	00213346 nib nz limited Staf...	78 KB
Payments	23/03/2018	00178223 Generic policy ex...	32 KB
Policy reinstatement	22/03/2018	00213346 nib nz limited Staf...	78 KB
Wellness benefit notific...	22/03/2018	00213346 nib nz limited Staf...	32 KB
Plan or benefit change	21/03/2018	00213346 nib nz limited Staf...	78 KB
Direct debit form	21/03/2018	00178223 Generic policy ex...	32 KB

[+ VIEW MORE](#)

Note: some documents may be unavailable here if a member receives documents by post.

## 6 policy documents available for Bill Bobaggins

POLICY DOCUMENT TYPE	POLICY	DOWNLOAD
Acceptance certificate	00213346 Acceptance certificate.pdf	14 KB
Acceptance certificate	00178223 Acceptance certificate.pdf	9 KB
Certificate letter	00178223 Certificate letter.pdf	1.5 MB
Certificate letter	00213346 Certificate letter.pdf	1.7 MB

Note: some documents may be unavailable here if a member receives documents by post.



The search results show information about the member.

◀ The contact details section displays the member's supplied contact information, and also which policy each item of contact information is associated with.

◀ The correspondence documents section displays documents emailed to the member that the adviser may access.

- sort by date or policy by clicking at the top of each column
- view more documents by clicking **View more**

◀ The policy documents section displays policy documents emailed to the member that the adviser may access.

- sort by policy document type or policy by clicking at the top of each column
- view more documents by clicking **View more**







## Downloading member correspondence documents

**6a** In nib adviser access, go to the **Member documents** tab.

Select the desired member's name from the member list.

The member's contact details, correspondence documents, and policy documents will be displayed.

32 correspondence documents available for Bill Bobaggins

CORRESPONDENCE TYPE	DATE	POLICY	DOWNLOAD
Rate change letter	23/03/2018	00213346 nib nz limited Staf...	 78 KB
Payments	23/03/2018	00178223 Generic policy ex...	 32 KB
Policy reinstatement	22/03/2018	00213346 nib nz limited Staf...	 78 KB
Wellness benefit notific...	22/03/2018	00213346 nib nz limited Staf...	 32 KB
Plan or benefit change	21/03/2018	00213346 nib nz limited Staf...	 78 KB
Direct debit form	21/03/2018	00178223 Generic policy ex...	 32 KB

[+ VIEW MORE](#)

Note: some documents may be unavailable here if a member receives documents by post.

To download a member document, click on the **icon** on the right-hand side.

Depending on your browser's settings, you may see one of these actions:

- a pop-up dialog asks you where to save the document
- the document downloads to your downloads folder without an alert
- the document opens in a new tab or a different app





## Downloading member policy documents

**7a** In nib adviser access, go to the **Member documents** tab.

Select the desired member's name from the member list.

The member's contact details, correspondence documents, and policy documents will be displayed.

**6 policy documents** available for **Bill Bobaggins**

POLICY DOCUMENT TYPE	POLICY	DOWNLOAD
Acceptance certificate	00213346 Acceptance certificate.pdf	 14 KB
Acceptance certificate	00178223 Acceptance certificate.pdf	 9 KB
Certificate letter	00178223 Certificate letter.pdf	 1.5 MB
Certificate letter	00213346 Certificate letter.pdf	 1.7 MB

Note: some documents may be unavailable here if a member receives documents by post.

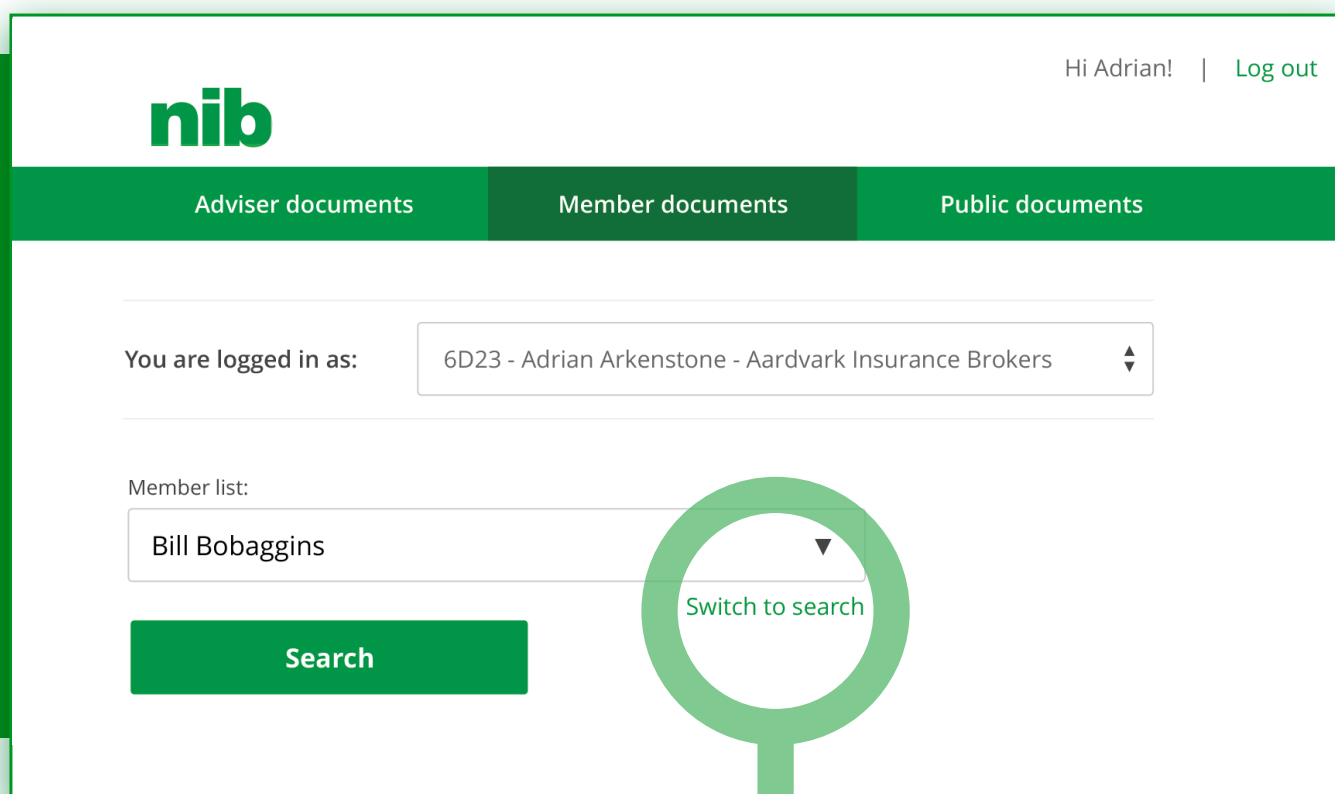
To download a policy document, click on the **icon** on the right-hand side.

Depending on your browser's settings, you may see one of these actions:

- a pop-up dialog asks you where to save the document
- the document downloads to your downloads folder without an alert
- the document opens in a new tab or a different app

## Searching for a member (policy or name search)

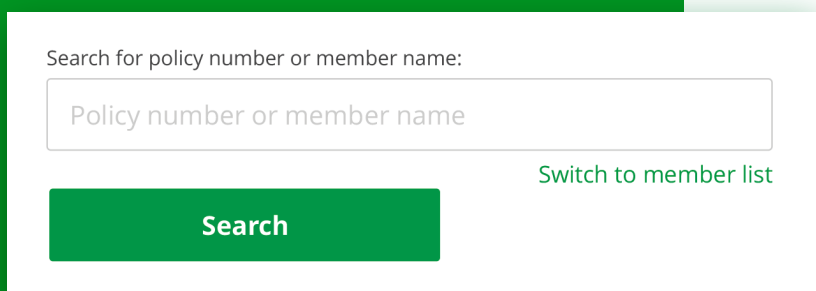
**8a** In nib adviser access, go to the **Member documents** tab.



The screenshot shows the nib adviser interface. At the top right, it says "Hi Adrian! | Log out". Below this is a navigation bar with three tabs: "Adviser documents", "Member documents" (which is selected), and "Public documents". Under the "Member documents" tab, there is a section "You are logged in as:" followed by a dropdown menu showing "6D23 - Adrian Arkenstone - Aardvark Insurance Brokers". Below this is a "Member list:" section with an input field containing "Bill Bobaggins" and a dropdown arrow. To the right of the input field is a green link that says "Switch to search". Below the input field is a green button labeled "Search". A green magnifying glass is drawn over the "Switch to search" link.

**8b** By default, a list of members is shown.

To search by policy number or type a name, click the **Switch to search** link.



The screenshot shows a search interface. At the top, it says "Search for policy number or member name:". Below this is a text input field with the placeholder text "Policy number or member name". To the right of the input field is a green link that says "Switch to member list". Below the input field is a green button labeled "Search".

**8c** Now instead of making a selection, you can type text to search.

To search, type a policy number or a name then click the **Search** link.

**8d** After you click the Search button, you may see more than one search result:

Hi Adrian! | [Log out](#)

**nib**

Adviser documents | **Member documents** | Public documents

You are logged in as: 6D23 - Adrian Arkenstone - Aardvark Insurance Brokers

Search for policy number or member name:

obaggins

[Switch to member list](#)

**Search**

**2 members** found for "obaggins"

<input type="checkbox"/>	<p>Bill Bobaggins</p> <p>DOB: 01/01/1950 (67 years old)</p> <p>Address: 1 Bag End, Devonport, Auckland</p>
<input type="checkbox"/>	<p>Fro Dobaggins</p> <p>DOB: 01/01/1980 (37 years old)</p> <p>Address: 1 Swag End, Remuera, Auckland</p>

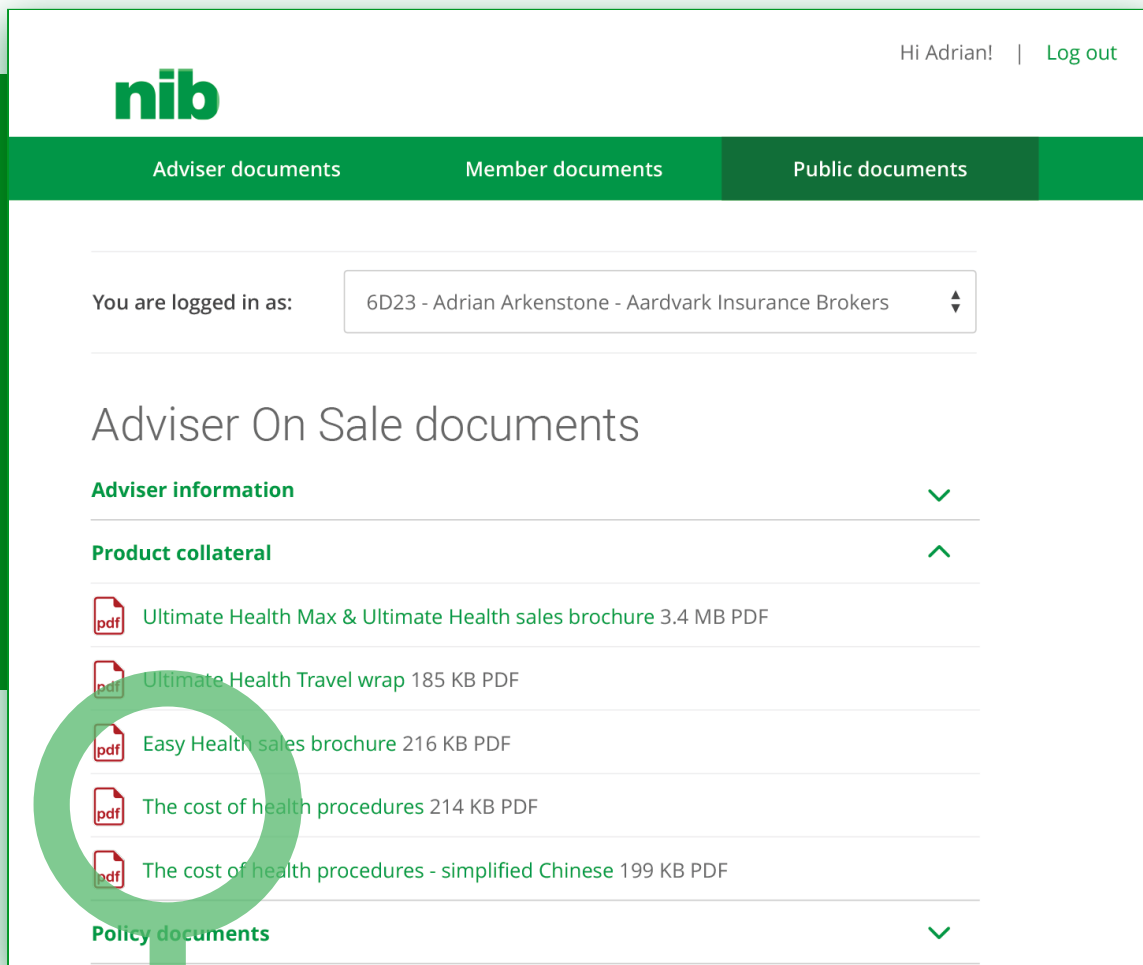
**8e** Members whose names match the search text are displayed. Look at the name, age, and address shown, and select one by clicking a ☐ **checkbox** to the left of the member you want.

☒ The search results for that member will be displayed below.



## Downloading nib FirstChoice and On Sale adviser documents

**9a** In nib adviser access, go to the **Public documents** tab.




To download a document, click on the **icon** or the name.

Depending on your browser's settings, you may see one of these actions:

- a pop-up dialog asks you where to save the document
- the document downloads to your downloads folder without an alert
- the document opens in a new tab or a different app

You can also access these documents at **[adviser.nib.co.nz](https://adviser.nib.co.nz)**

## Switching to a different UAN

- 10a** In nib adviser access, go to any tab.

You will see the current UAN, adviser name, and business displayed in a list menu:

You are logged in as:

6D23 - Adrian Arkenstone - Aardvark Insurance Brokers

- 10b** Click on the **list showing the current UAN** to see all available UAN numbers.

Select the UAN you want from the list.

- ✓** You have now switched to a different UAN.

The details and member information displayed is limited to the UAN that is selected. To view details and member information related to a different UAN, you must switch to that UAN instead.