



# MYCLAIM EMPLOYEE | QUICK REFERENCE GUIDE

OLD MUTUAL

DO GREAT THINGS EVERYDAY



**TW-pOT**  
RETIREMENT SYSTEM



## QUICK REFERENCE GUIDE

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# HOW TO SUBMIT YOUR EXIT CLAIM ON MYCLAIM PROCESS.

01

### Employee

Completes online form on the secure digital platform - MyClaim.



### Employer Confirmation

- Confirms employee exit date and reason on payroll file
- Confirms any prior claims

02

03

### Fund Administrator

Processes claim and pays out claim





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## HOW TO SUBMIT YOUR EXIT CLAIM ON MYCLAIM.

1. Log in to the Old Mutual website



**Log in** or **Signup** on the Old Mutual website by clicking **here**.

2. Access MyClaim



Click on your Fund to access MyClaim.

3. Complete and Submit the online form



- Complete your personal details
- Complete your claim details
- Provide supporting material
- Accept the terms and conditions and submit the claim for Employer Confirmation



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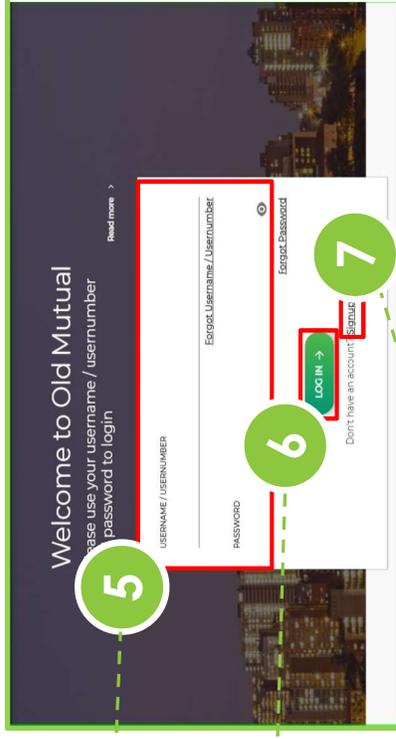
Link to <https://oldmutual.co.za/> on your browser

Click on **Login**



Click on **MyOldMutual to Login OR**

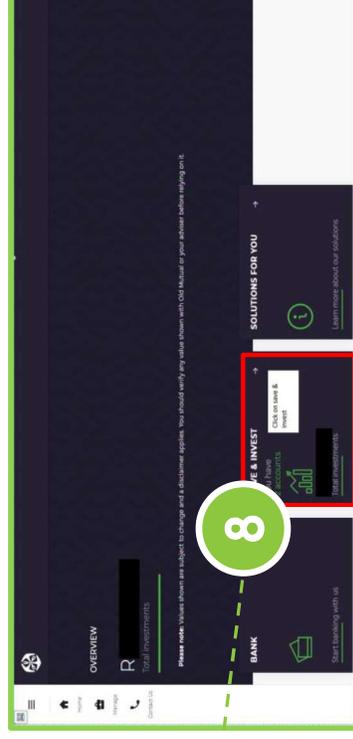
Click on **Register for a service** if not yet registered.



Complete the form with your username and password

Click on **LOG IN** if you have registered before OR

Click on **Signup** to register by following the steps



Once logged in, Click on **SAVE & INVEST**

Please reach out to the call centre (08:00 – 17:00) should you need assistance: **0860 20 30 40**

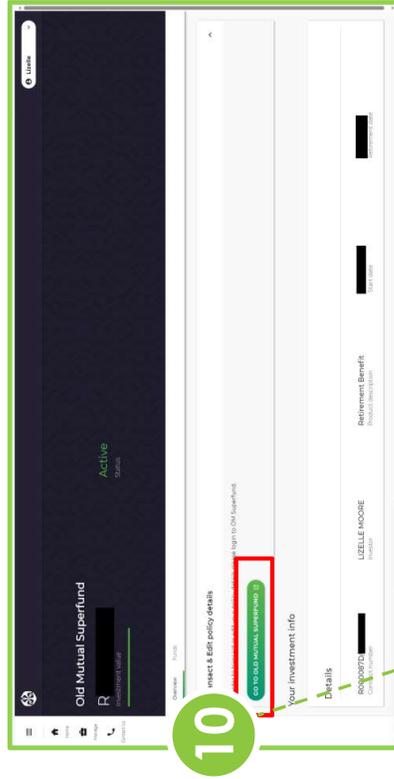


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Click on the relevant membership/contract.



Click on **GO TO OLD MUTUAL SUPERFUND**



Click on **MYCLAIM** to access the online form

Please reach out to the call centre during office hours should you need assistance: **0860 20 30 40**



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## Before you begin

Before you begin your claims journey please make note of the following things you will need to complete the claims form:

- 1. Exit date and reason**  
If your fund is linked to your employer, make sure to align with your employer on your exit date (the date you are leaving your company) and exit reason (why you are leaving).
- 2. Banking details**  
If you are claiming a full or part cash pay out you'll need to provide your banking details and you may need to provide proof of your bank account.
- 3. Transfer fund details**  
If you are transferring your funds you'll need to provide a copy of your application to the new fund (where applicable).
- 4. Court orders**  
You will be asked if you have any divorce order(s) and/or maintenance court order(s) against your benefit. If you do then supporting documentation will be required depending on the court order.
- 5. Additional supporting documentation**  
As you go through the completion of your claim you may be asked to provide additional supporting documentation.

12

CONTINUE

13

**NOTE:** Before commencing the claims journey, ensure that you read the details displayed on screens carefully and ensure that you have all the relevant information and documents to start continue. Click **CONTINUE** to start completing the online form.

“Personal Details” form is prepopulated with available information. Complete any missing information.

Click on **CONTINUE** once you have completed all the details.

The screenshot shows a multi-step form with the following sections:

- Residential Details:** Fields for Unit number, Complex name, Street number, Street name, Suburb, City, Postal Code, and a checkbox for 'The postal address is the same as the residential address'.
- Postal Address:** Fields for PO Box Address (line 1), City, and Postal Code.
- Financial adviser details (Optional):** A checkbox for 'Do you have a Personal Financial Adviser?'.
- Personal Details:** Fields for First & last name, Date of birth, ID number, and a 'Please note' section with instructions to update details.
- Personal contact details:** Fields for The number, Are you a full/paper in another country, and a 'Please note' section.
- Phone number:** Fields for Telephone number and Email address.

A red box highlights the 'Personal Details' section, and a green box highlights the 'CONTINUE' button at the bottom right. A dashed green line connects the '13' callout to the 'Personal Details' section.

14

CONTINUE

Please reach out to the call centre (08:00 -17:00) should you need assistance: **0860 20 30 40**



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15

Complete the Claim Details

1500 2 of 4

Let's cover some details about your claim

**Exit details**

Below are the exit details that your employer has indicated to us.

30/05/2024

**Please note**  
If you disagree with the exit date and/or reason provided by your employer, please have a discussion with your Employer to sign on the exit date and reason.

30/05/2024

Where you're leaving your employer

Resignation

Why you're leaving your employer

**Benefit: payment options**

R 296 866.40  
Total benefit value

R 296 866.40  
Cash withdrawal limit

**Please note**  
Before you select an option, please consider what you want to do with your retirement savings. Discuss your options with your financial adviser. Or contact one of our experienced consultants by emailing [membersupportservices@oldmutual.com](mailto:membersupportservices@oldmutual.com) or calling 0860 20 30 40.

**Please select what you like to do with your retirement savings.**

Take some of your retirement savings in cash and transfer the rest to another approved fund  
Includes tax implications

Transfer all of your money into another approved fund  
Not taxable

Take all of your money in cash (not recommended)  
Includes tax implications

Remain a member of the fund  
Not taxable

**Potential claims against your benefit**

Please note  
According to Section 37D of the Pension Funds Act, if your employer indicates to Old Mutual that you are resigning from your employment, you must not, or misconduct it, will be settled through your claim before pay out or transfer.

Do you have a divorce court order that should be settled from your scheme?  
 Divorce Court Order

**PREVIOUS**

**CONTINUE**

**Have any questions?**  
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist you. Call us on **0860 20 30 40**.

Click **CONTINUE** to move to the next step

**NOTE:** The following pop-up note will be displayed

Click on **YES** to continue or **NO** to change the Benefit Payment Option Selection.

17

**Please Note**

Are you sure you want to continue with the Exit Reason you've selected?

NO

YES

Should this pop-up be displayed, click on **GO BACK TO MY CLAIM** to rectify errors.

18

**Error**

Postal Code is a required field.

City/Town is a required field.

Postal Code is a required field.

**GO BACK TO MY CLAIM**

Please reach out to the call centre (08:00 -17:00) should you need assistance: **0860 20 30 40**



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Step 3 of 6  
Tell us about the retirement fund you're transferring to

Withdraw some of your money and transfer the rest

R 296 866.40	R 296 866.40
Total benefit value	Cash withdrawal limit
Cash value	
R • 100 000.00	
* Please note, the cash value will be subject to tax.	
Transfer value	
R • 196 866.40	

Retirement fund details

Please provide the following details of the retirement fund or annuity you are transferring your funds to:

Insurer & retirement fund name

Percentage of money to be transferred to the fund  %

Contact name (optional)

Contact number (optional)

Fund bank code

Fund bank account

PREVIOUS **SAVE FUND**

Have any questions?  
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist.  
**0860 20 30 40.**

Click on **CONTINUE** to progress to Banking Details

19

Step 3 of 5  
Let's talk financials

Banking Details

Bank name

Branch code

Account number

Account Type

Current Account  Savings Account  In Account

PREVIOUS **CONTINUE**

Have any questions?  
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist.  
**0860 20 30 40.**

20

Complete banking details

Click on **CONTINUE** to progress documents

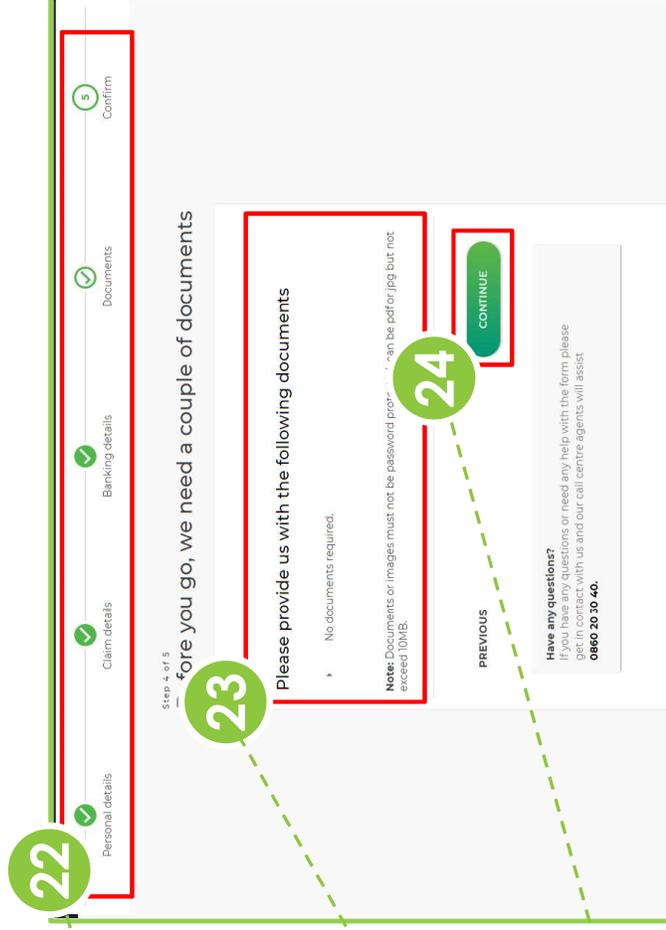
21

Please reach out to the call centre (08:00 - 17:00) should you need assistance: **0860 20 30 40**



# QUICK REFERENCE GUIDE

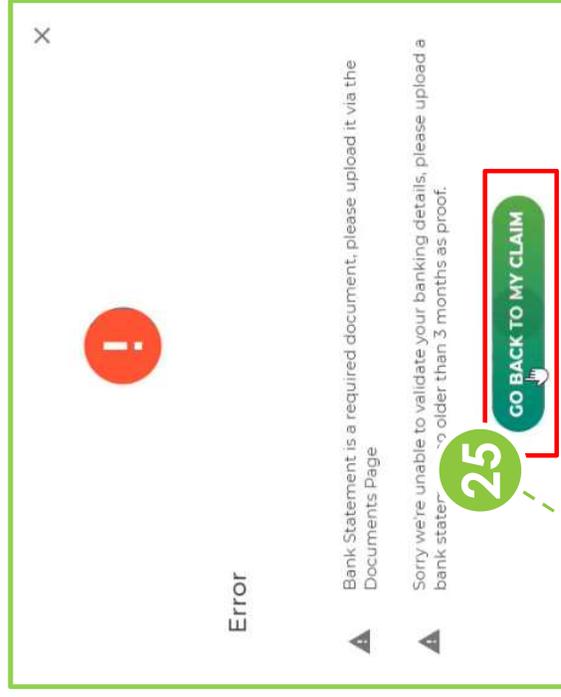
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The progress bar, shows you the steps you have completed and what is outstanding

Attach the required documents

Click on **CONTINUE** to confirm



**NOTE:** If there are any errors, a message will be displayed as per example above

Click on **GO BACK TO MY CLAIM** to rectify the errors

Please reach out to the call centre (08:00 – 17:00) should you need assistance: **0860 20 30 40**





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**Your claim has been successfully submitted**  
Your claim has now been sent to your employer to approve. Once your claim has been approved by your employer, please allow up to **10 working days** to process and authorise your claim.

You're reference for this claim is your **member number: 10253846**. Look out for further communication on the status of your claim.

**Next Steps**

	<p><b>Employer approval</b> Your exit details (when you are leaving and when you are leaving) will be submitted to be approved by your employer.</p>
	<p><b>Claim processing</b> Your claim will be processed by the administration team to double check the details you've provided.</p>
	<p><b>Tax application</b> Your claim will be submitted to SARS for a tax directive. SARS will inform us of how much tax must be deducted from your scheme money.</p>
	<p><b>Claim authorisation</b> Your claim will then be sent to be authorised by our team and the pay out will be triggered.</p>
	<p><b>Claim pay out &amp; transferred</b> Your claim is then paid into your account and the rest of your money will be transferred into your new annuity fund(s).</p>

DOWNLOAD SUMMARY

DONE →

29

30

28

Read through at the above for all the processing steps.

Click on Done to exit the portal

**NOTE:** We will keep you informed on the progress via SMS.

**NOTE:** Once you have submitted your claim, it will go to your Employer to confirm.

You will have the option to:  
**DOWNLOAD A SUMMARY**  
of the claim details you  
completed

Please reach out to the call centre (08:00 – 17:00) should you need assistance: **0860 20 30 40**



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### PLEASE NOTE THE CONTACT DETAILS FOR ADDITIONAL SUPPORT:

#### **Secure Services registration or login:**

Email: [help-secure@oldmutual.com](mailto:help-secure@oldmutual.com)

Call **0860 60 65 00**

#### **Personal detail updates:**

Call centre: **0860 20 30 40**

#### **Financial Advice (Benefit Options)**

- Consult your personal Financial Advisor or
- Employer appointed Financial Advisor or
- Old Mutual Consultant - Email: [membersupportservices@oldmutual.com](mailto:membersupportservices@oldmutual.com)  
Call: **0860 38 88 73**



# THANK YOU!

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RETIREMENT SYSTEM

Old Mutual Life Assurance Company (SA) Limited is a licensed FSP and Life Insurer.