

MyClaim User Guide

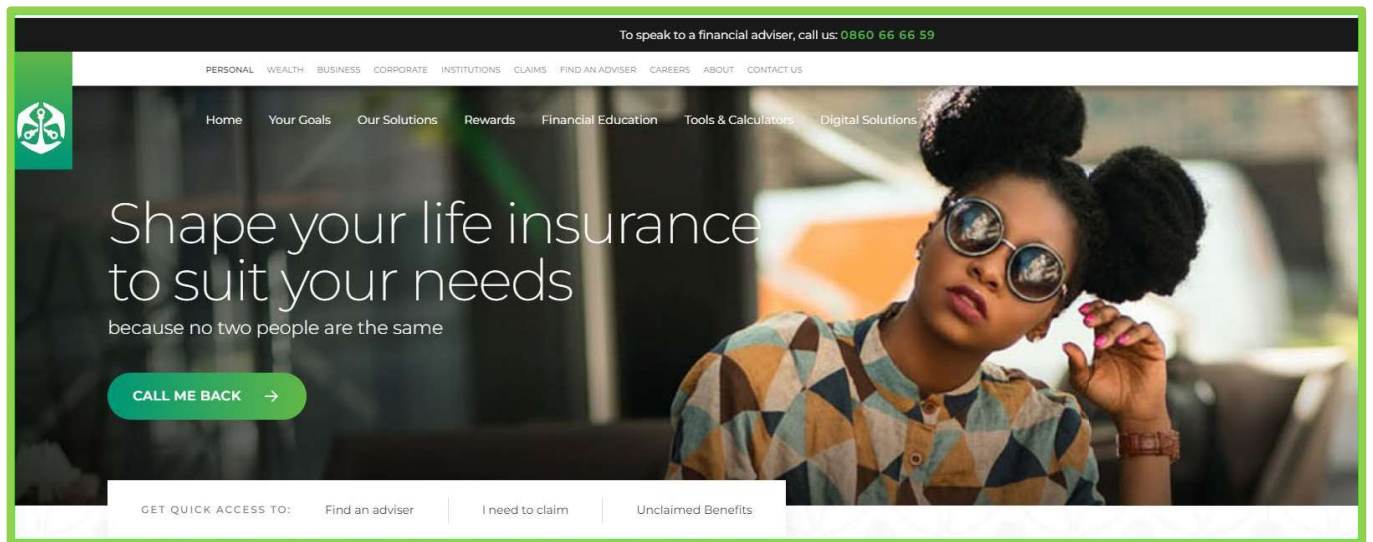


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Overview

“MyClaim” is an application made available to members to submit their Withdrawal or Retirement Claim instructions digitally. Members will be required to register on “My Old Mutual (MOM)” to utilize the functionality, if they do not have an account.

Claim types:

- Withdrawal (Resignation, Dismissal and Retrenchment)
- Retirement (Normal, Early, Late, Ill-health Retirement) (these are the retirement events, but the only items displayed to the member are Retirement (which must be used to submit normal, early, and late retirement claims) and Ill Health Retirement

Members whose Membership Status is **“Active Member”** will be allowed to access their information via **“MyClaim”**.

A draft **MyClaim** can be created via the submission of the monthly payroll for each member where exit date and exit reason were captured on the payroll file.

The member is required to complete all the detail required to process the claim on **“MyClaim”**. If the required conditions for complete and accurate data, supporting documents, etc. are not met within the stipulated timeframes (90 days for SACWU/ SACCAWU and 120 days for SuperFund and ISSASA) the benefit will be defaulted to the Preserver/Paid-Up option.

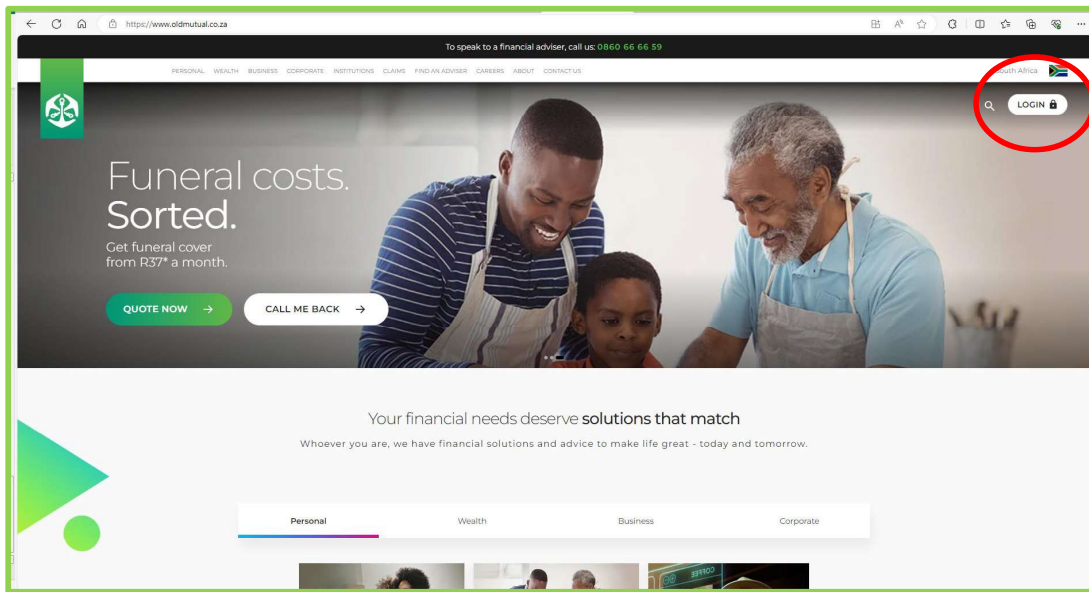
The member will not be able to track his claim on **“MyClaim”** once it has been submitted.

Member will receive automated SMS messages and emails as the claim processing progresses.

Where the Employer's payroll is in arrears, a member will not be able to submit a claim. Member will receive a message to contact the Employer as well as a message when the payroll arrears has been settled.

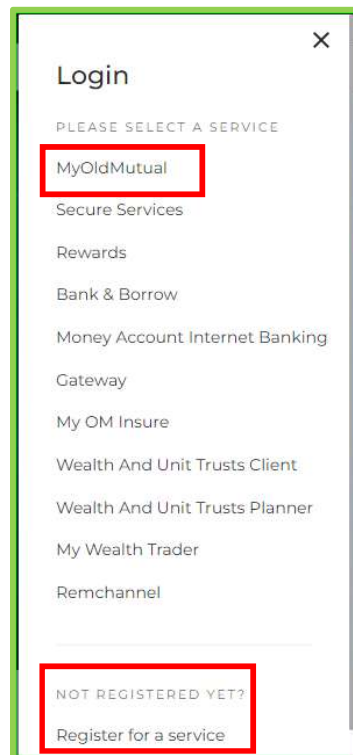
Log on to Old Mutual Website

Link to <https://oldmutual.co.za/>



Select the  button and the following vertical navigation menu is displayed!

Select the service required. Member to click the **“MyOldMutual”** from the drop-down menu.



Note: If you do not have an account, click on the **“Register for a service”**, and follow the registration steps to get access.

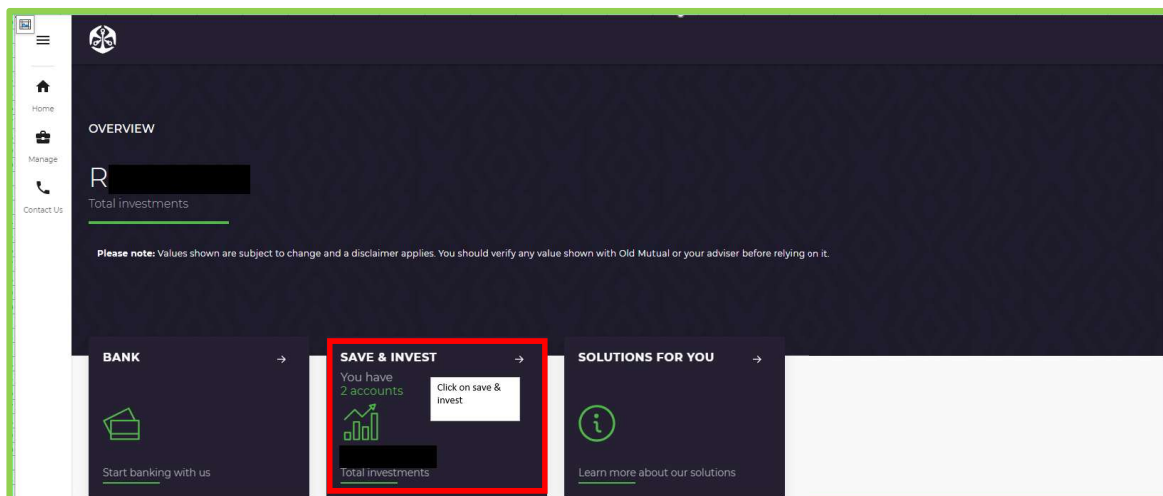
Complete the form with your username / usernumber and password to



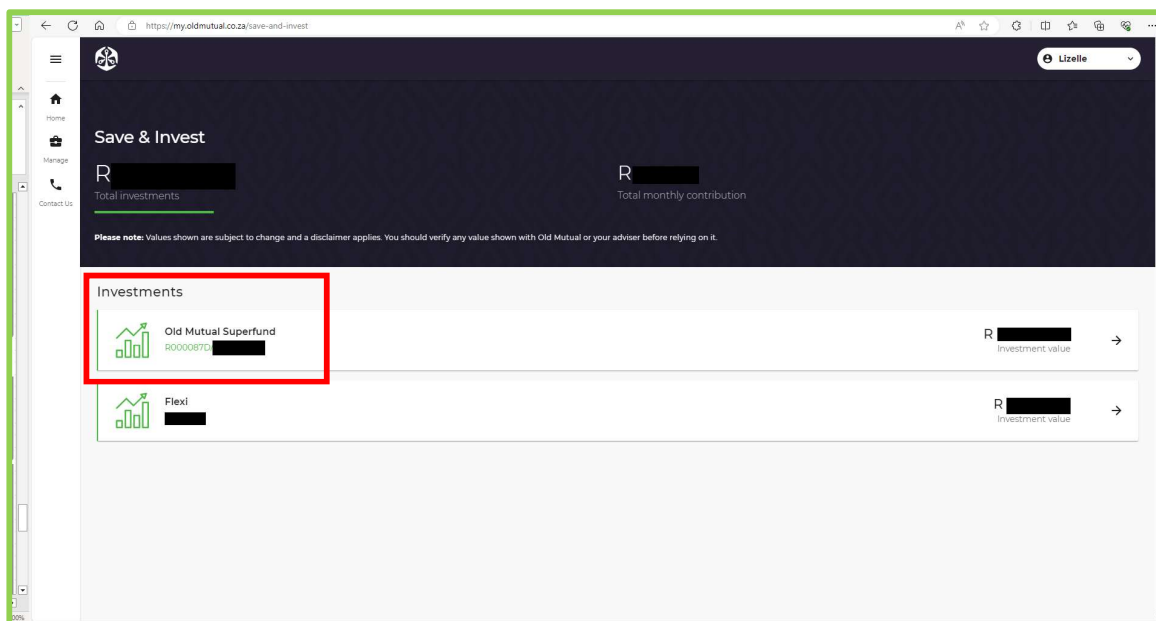
The image shows the Old Mutual login page. At the top, it says "Welcome to Old Mutual" followed by "Please use your username / usernumber and password to login". There is a "Read more" link. Below this is a login form with two input fields: "USERNAME / USERNUMBER" and "PASSWORD". Each field has a "Forgot" link next to it. Below the password field is a "LOG IN" button with a right arrow icon. At the bottom of the form, it says "Don't have an account? [Signup](#)". The footer contains links for "Disclaimer", "Directors", "Privacy Notice", "Cookie Policy", "Terms & Conditions", and "Contact us".

Note: If you do not have an account, click on the “Signup” option, and follow the registration step. Link to document on [“How to Signup”](#).

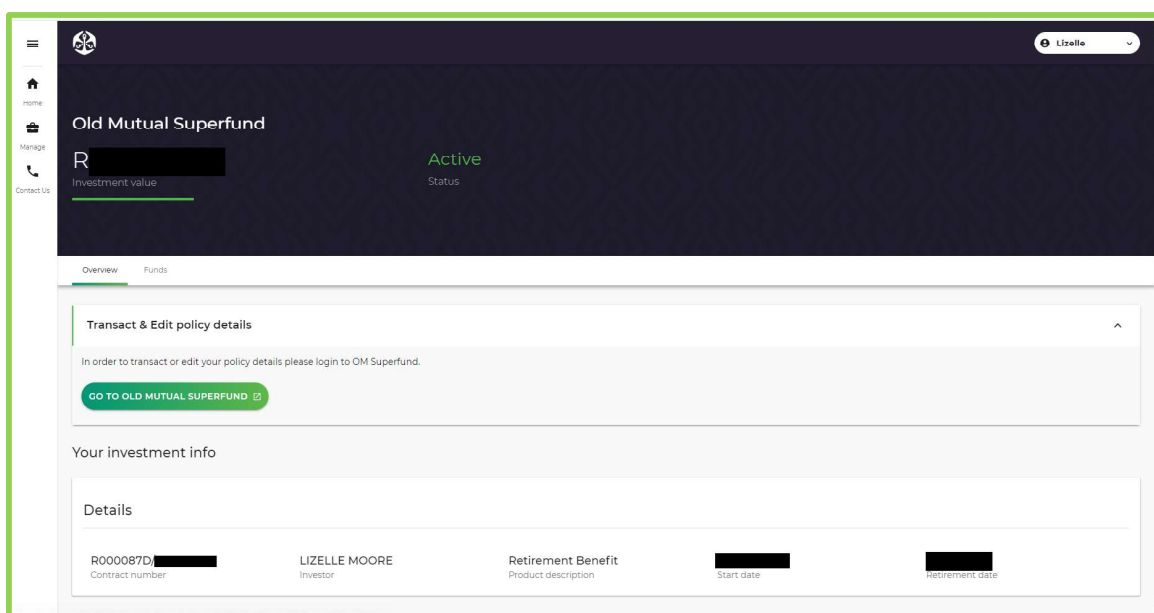
Click on “Save & Invest”



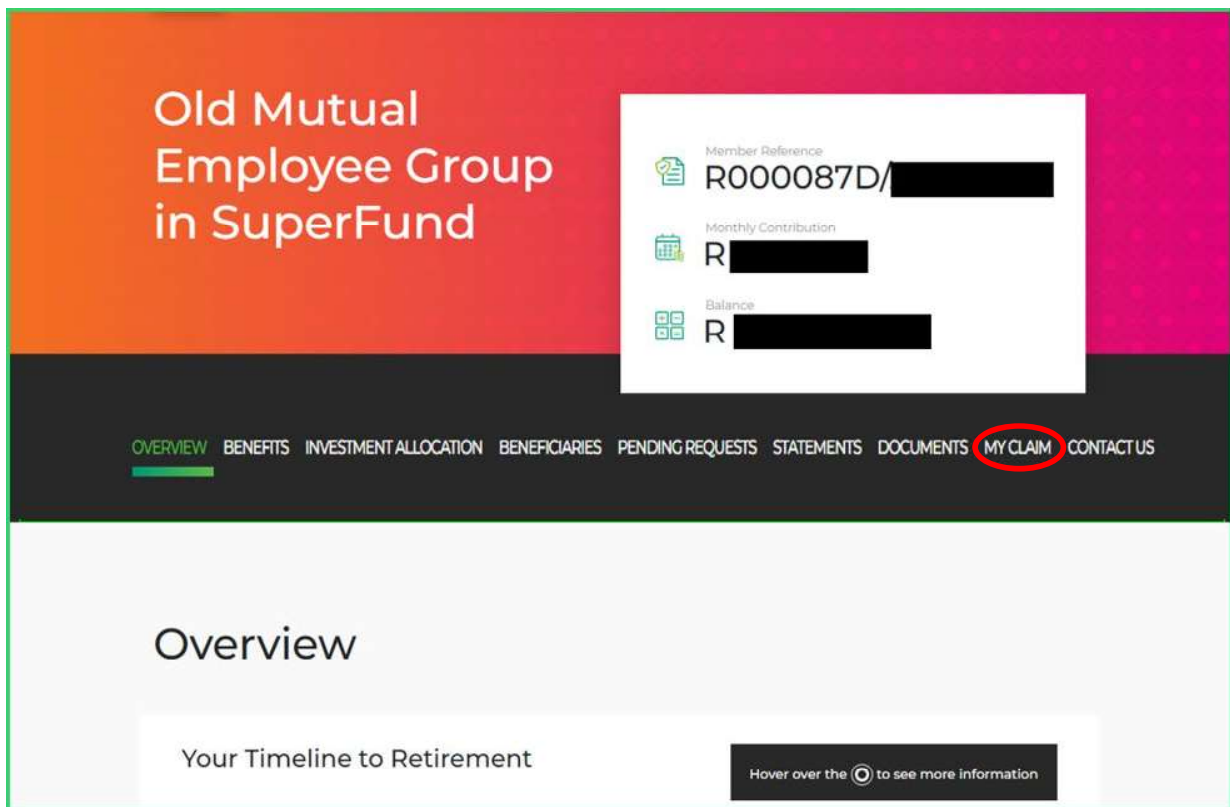
Click on the relevant membership/contract. For MyClaim, select Old Mutual SuperFund listed under Investments



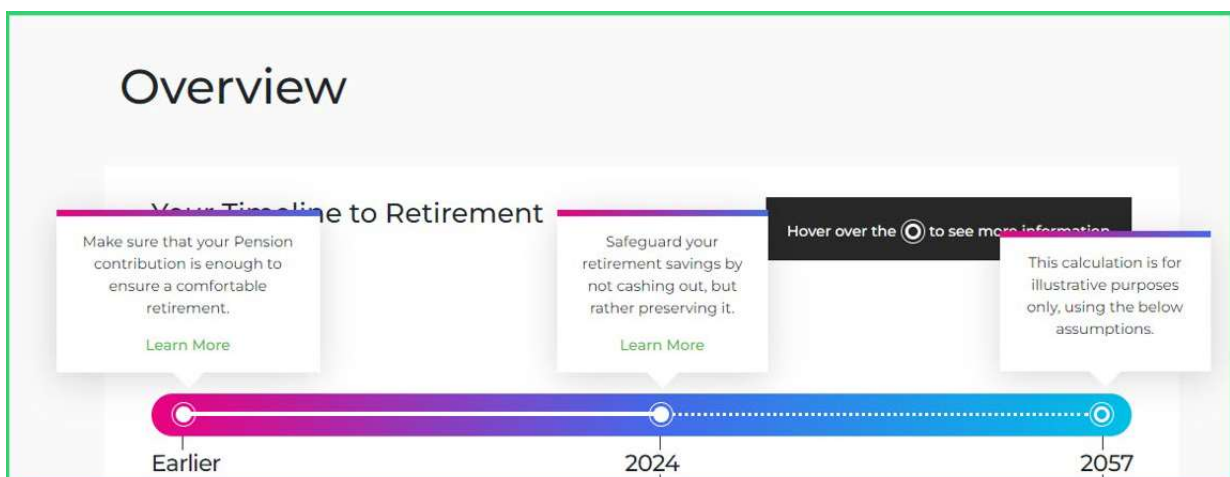
Click on [GO TO OLD MUTUAL SUPERFUND](#) to access the Member WEB.



Select **"MYCLAIM"** tab on the horizontal navigation menu – black banner/strip.



Hover over the icon [icon] on the timeline to see more information as illustrated in picture below:



Before commencing the claims journey, the member must ensure that they read the details displayed on screens carefully and ensure that they have all the relevant information and details to continue.

A member will not be able to complete the submission where information is incomplete.

Before you begin

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/Annuity product details

If you are transferring your funds or buying a pension in the event that you are retiring, you'll need to provide a copy of your application to the new fund or annuity product (where applicable).

4. Court orders

You will be asked if you have any divorce 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.

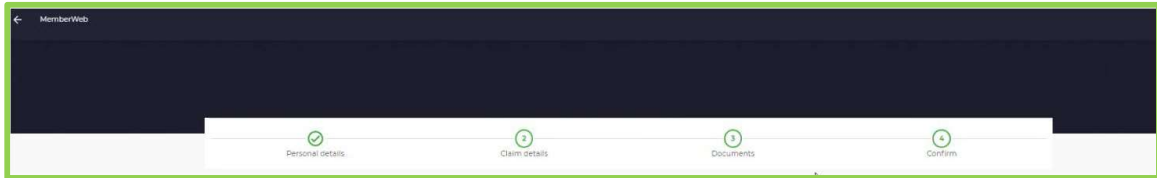
CONTINUE

Steps to complete

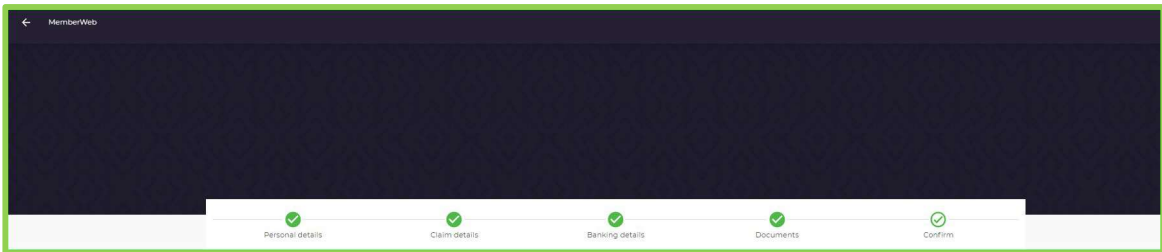
Mandatory data sections to be completed varies depending on the member's Benefit Option selection.

The picture below illustrates the **"Stepper"** which is dynamic. It updates automatically based on the member's Benefit Option selection.

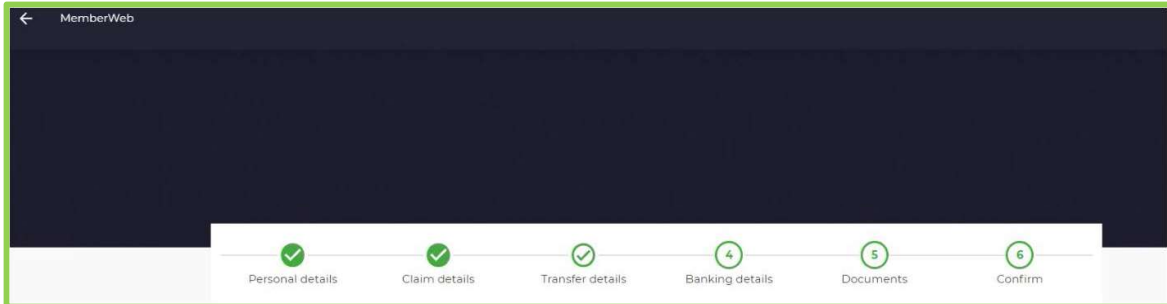
"Stepper" where **"No Banking"** details are required:



"Stepper" where **"Banking"** details are required:



"Stepper" where **"Transfer and Banking"** details are required:



Complete Data forms for each section of **"Stepper"** as displayed:

1. Personal Details
2. Claim Details
3. Transfer Details (If applicable)
4. Banking Details (if applicable)
5. Documents
6. Confirm

STEP 1 - “Personal Details”

“Personal Details” form is prepopulated with Compass data.

If any updates required to the prepopulated Compass data contact the call centre on 0860 20 30 40.

Note: Only the “Tax Number and Tay Payer status” may be updated by member.

Step 1 of 2
Tell us a bit about yourself

Personal Details

Mrs Filipe MOCHELLE
First & full name

21/06/1997
Date of birth

970620894084
ID Number

Please note
If your Full Name and Surname, Date of birth and Identity number/ Passport number are incorrect kindly contact our call centre on 0860 20 30 40 to update your details. Any other personal details can be updated on this form.

Tax Number
0574927257

Are you a tax payer in another country other than South Africa?
☐ Yes ☒ No

Personal contact details

Please note
Please ensure you provide contact details indicating how we can contact you after leaving from the service or your employer.

Cellphone number
0813755299

Email Address
rfacorporatetesting@oldmutual.com

Residential Details

Unit number

Complex name

Street number

Street name

Suburb

City

Postal Code

☐ The postal address is the same as the residential address

Postal Address

PO Box Address line 1

City

Postal Code

Financial adviser details (Optional)

Do you have a Personal Financial Adviser?
☐ Yes ☒ No


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.

“Contact Details” provided will be used to communicate with member via SMS and email. SMS will also be sent to member as a notification that an email was sent either providing or requesting additional information.

“Residential Details and Postal Address” required for taxation purposes.

“Financial Adviser” details provided will be stored on member record on Compass.

Click the  button to progress to Claim Details.

STEP 2 - "Claim Details"

Before you select an option

Before you make a final decision about what to do with your retirement savings, discuss your options with your financial advisor OR contact one of our experienced consultants by emailing membersupportservices@oldmutual.com or calling **0860 38 88 73**.

Step 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.

Exit date: 30/05/2024

Exit reason: Resignation

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

30/05/2024

When you're leaving your employer:

Resignation

Why you're leaving your employer:

Benefit payment options

R 296 866.40 R 296 866.40

Total benefit value Cash withdrawal limit

Potential claims against your benefit

Please note
According to Section 37D of the Pension Funds Act, if your employer indicates to Old Mutual that there has been any damages caused by fraud, theft, dishonesty 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.
0860 20 30 40.

Note: If the member needs to update the **"Exit Reason"** from a Withdrawal Type to a Retirement Type or vice versa then the claim must be deleted and captured as a new claim.

Click the **CONTINUE** button to progress to Transfer Details (if applicable).

If there were any omissions in data an error message is displayed. Refer to example below:

STEP 3 - "Transfer Details"

Complete required data fields.

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

Total benefit value

R 296 866.40

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 name

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  button

Click the  button to progress to Banking Details.

STEP 4 - “Banking Details”

Proof of bank details is mandatory.

Member will be presented with a message that proof of bank details must be uploaded if AVSR check cannot be done **or** that the bank check cannot be done and ask them to upload proof of bank details. Inform member that a valid proof of banking details must be a stamped bank statement, less than 3 months, that is in the members name and ID.

Step 3 of 5

Let's talk financials

Banking Details

Bank name

Branch code

Account number


Account Type

☐ Current Account ☐ Savings Account ☐ Transmission 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.

Click the  button to progress to Documents.

STEP 5 - “Documents”

Depending on the Benefit Payment Option selected, the documentation required from the member will be listed under this section.

Step 5 of 6

Before you go, we need a couple of documents

Please provide us with the following documents

▶ Proposal/Application Form of Receiving Fund

Note: Documents or images must not be password protected, can be pdf or jpg but not exceed 10MB.

Proposal/Application Form of Receiving Fund

Max 10 MB

↑

PREVIOUS

CONTINUE

Have any questions?

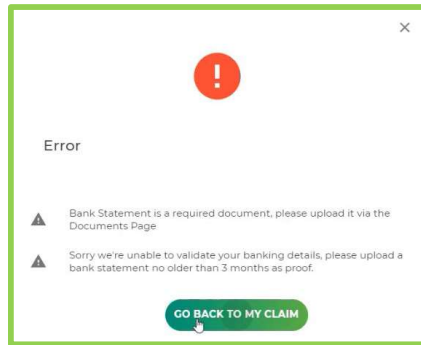
If you have any questions or need any help with the form please get in contact with us and our call centre agents will assist

0860 20 30 40.

If the member selected “**Transfer**” then the “**Stepper**” will include the **Transfer Details** section and the member will be required to upload the Proposal/Application Form of Receiving Insurer.

Click the  button to progress to Confirm.

If there are any errors a message will be displayed as per example below:



STEP 6 - “Confirm”

Step 6 of 8

Confirm your form details

Personal details

Mr Danyla Bely
First & full name

9270040007085
ID Number

98620277
Tax Number

Contact details

0834491981
Cellphone number

sparkle10@oldmutual.com
Email Address

Residential address

2, Jan Smuts Drive, Pinetown
Cape Town
7705
Residential address

Claim details

Resignation
Exit reason

2024/06/01
Exit date

Take some of your retirement savings to cash and transfer the rest to another approved Fund.
Fund:
Benefit payment option

Transfer details

R 100,000.00
Cash value

R 194,866.40
Transfer value

Fund details

PROTEKTOR PRESERVATION PENSION FUND
Funder

Contract name

Contract number

Banking details

PostBank - South African Post Office Bank
Bank name

SA POSTBANK SOC LTD
Branch name

PostBank - South African Post Office Bank
Branch Code

4381900
Account Number

Current Account
Account type

Documents

Protektor_IPS_Member_Version.pdf
[Download]

B67000000063.pdf
[Download]

ClaimSummary.pdf
[Download]

Please read through and accept the terms and conditions, related to your claim, before you submit.

☐ I accept the [terms & conditions](#)

PREVIOUS

ACCEPT & SUBMIT CLAIM


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.

If the Benefit Payment Option selected is **Part Cash/Part Transfer to Another Approved Fund** the “**Confirm**” page will reflect **Transfer Details**.

Read through the terms and conditions and tick the check box

Click the  button.

☐ I accept the [terms & conditions](#)

Final validation checks are run in the background after clicking  button. There’s a cost to Old Mutual for running the various checks and therefore certain checks are only done when the member has submitted the claim.



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



Employer approval

Your exit details(why you are leaving and when you are leaving) will be submitted to be approved by your employer.



Claim processing

Your claim will be processed by the administration team to double check the details you've provided.



Tax application

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.



Claim authorisation

Your claim will then be sent to be authorised by our team and the pay out will be triggered.



Claim pay out & transferred

Your claim is then paid into your account and the rest of your money will be transferred into your new annuity fund(s).

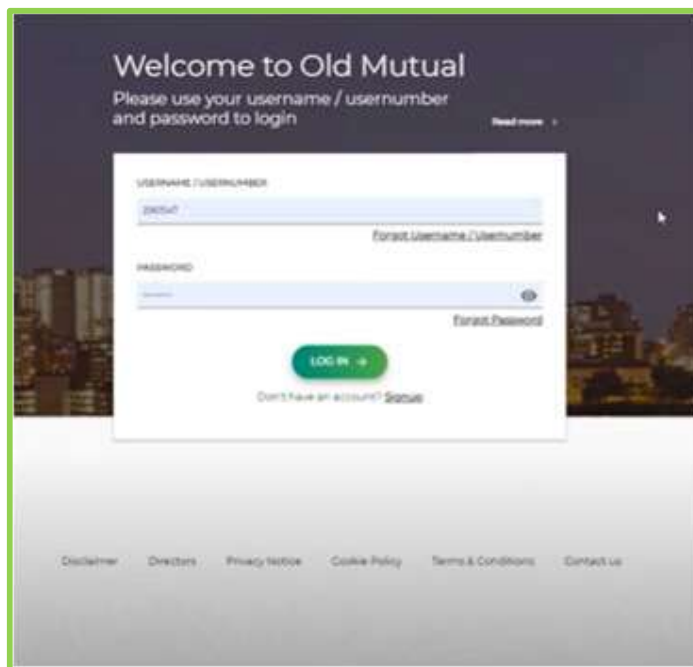
[DOWNLOAD SUMMARY](#)

[DONE →](#)



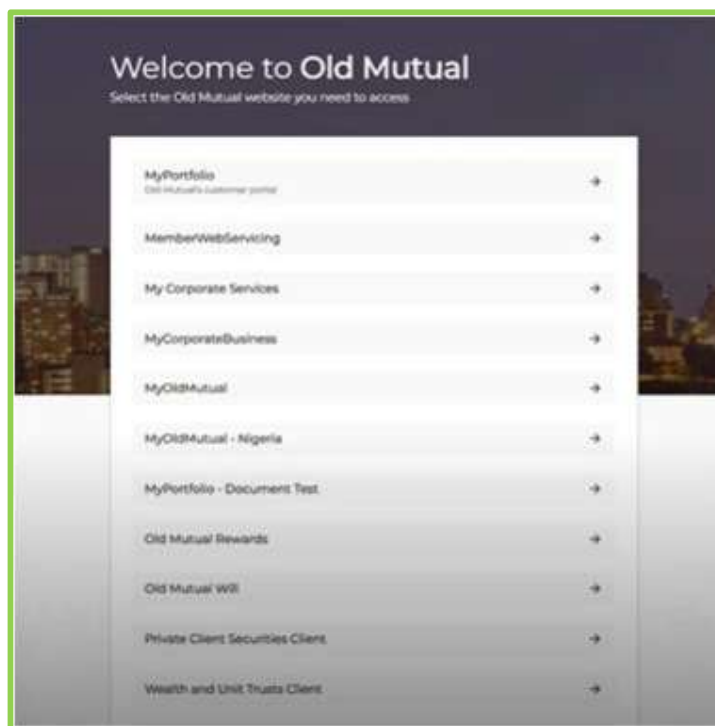
General Information for Call Centre Agents

Log on [Secure Services](#)



The image shows the Old Mutual login page. At the top, it says "Welcome to Old Mutual" and "Please use your username / usernumber and password to login". There is a "Read more" link. Below this is a login form with two input fields: "USERNAME / USERNUMBER" and "PASSWORD". The "USERNAME / USERNUMBER" field has a placeholder "200507" and a tooltip "Format: Username / Usernumber". The "PASSWORD" field has a placeholder "12345678" and a tooltip "Format: Password". Below the fields is a green "LOG IN" button with a right arrow. Under the button is a link "Don't have an account? [Sign up](#)". At the bottom of the page are links for "Disclaimer", "Directors", "Privacy Notice", "Cookie Policy", "Terms & Conditions", and "Contact Us".

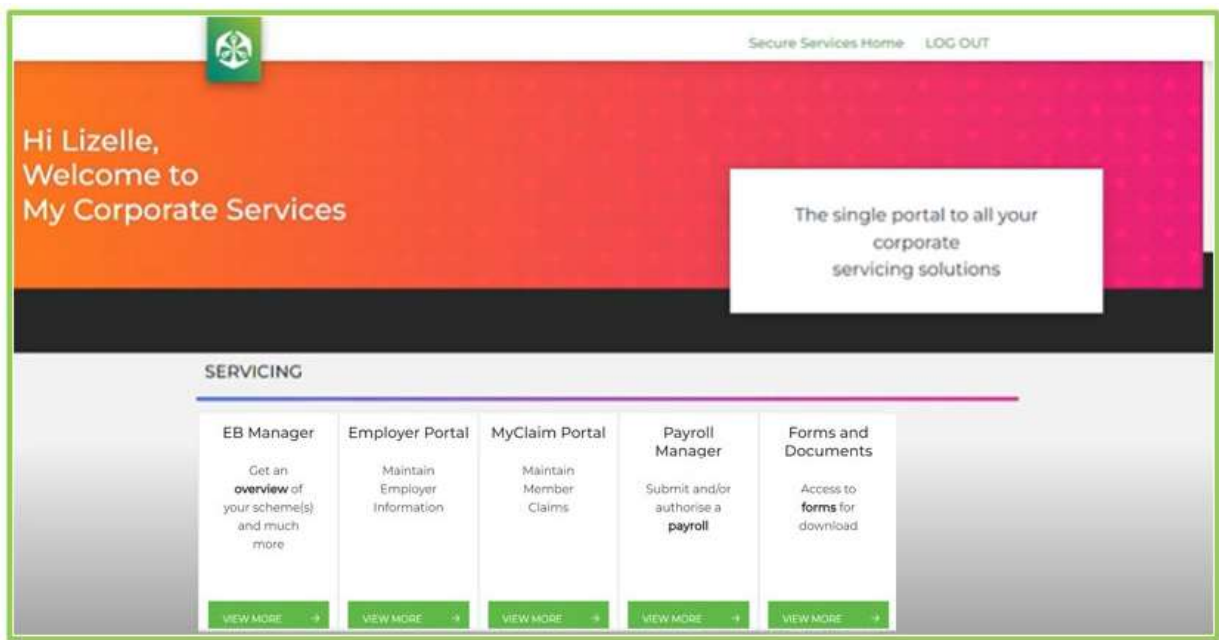
Select **"My Corporate Services"**



The image shows the Old Mutual service selection page. At the top, it says "Welcome to Old Mutual" and "Select the Old Mutual website you need to access". Below this is a list of services, each with a right arrow:

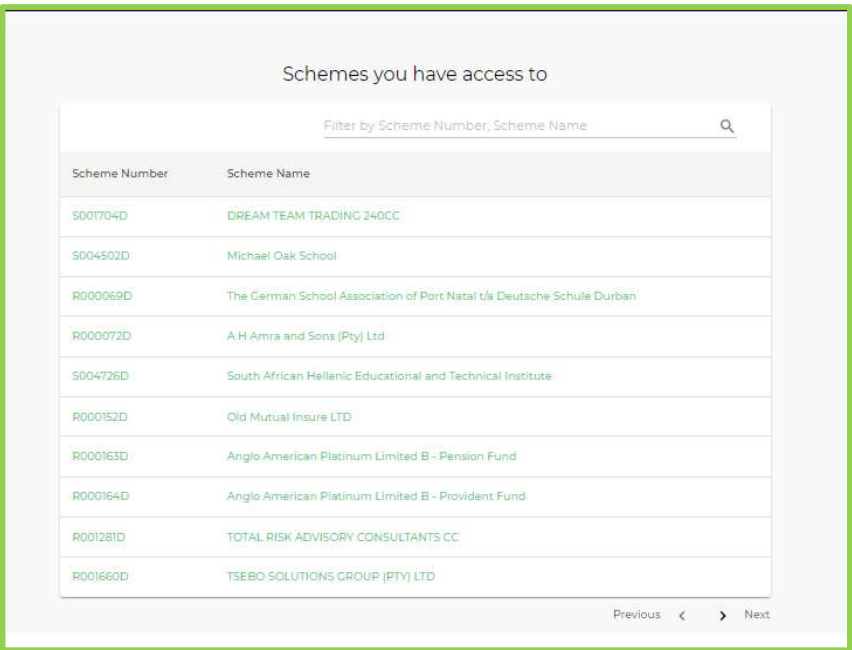
- MyPortfolio
Old Mutual's customer portal
- MemberWebServicing
- My Corporate Services
- MyCorporateBusiness
- MyOldMutual
- MyOldMutual - Nigeria
- MyPortfolio - Document Test
- Old Mutual Rewards
- Old Mutual Will
- Private Client Securities Client
- Wealth and Unit Trusts Client

Click on the “MyClaim Portal” tile



Call centre agents will have access to **ALL schemes** excluding **Staff Fund R000087D**

They can search by **Scheme Number or Scheme Name**



Will be able to **view a claim** to assist member online as required.

Member Summary

ALL SCHEME MEMBERS

CLAIMS IN PROGRESS

SEARCH

Claim Reference	First Name	Surname	ID Number	Passport Number	Member Reference	
358	Neil Michael	AKERMANN	8306015179081		5193109A	VIEW CLAIM
362	Tshepo Paul	ANDREWS	9909136450080		10478994	VIEW CLAIM

Rows per page: 10 1-2 of 2

Glossary of terms

Considering the needs of the audience, describe any new or potentially unfamiliar terms or words used in the document.

Term	Definition
MVP	Minimum Viable Product
MOM	My Old Mutual
SSA	Secure Services Application
AVSR	Account Verification Service – Real Time
DHA	Department of Home Affairs
ROT	Recognition of Transfer
MOP	Method of Payment