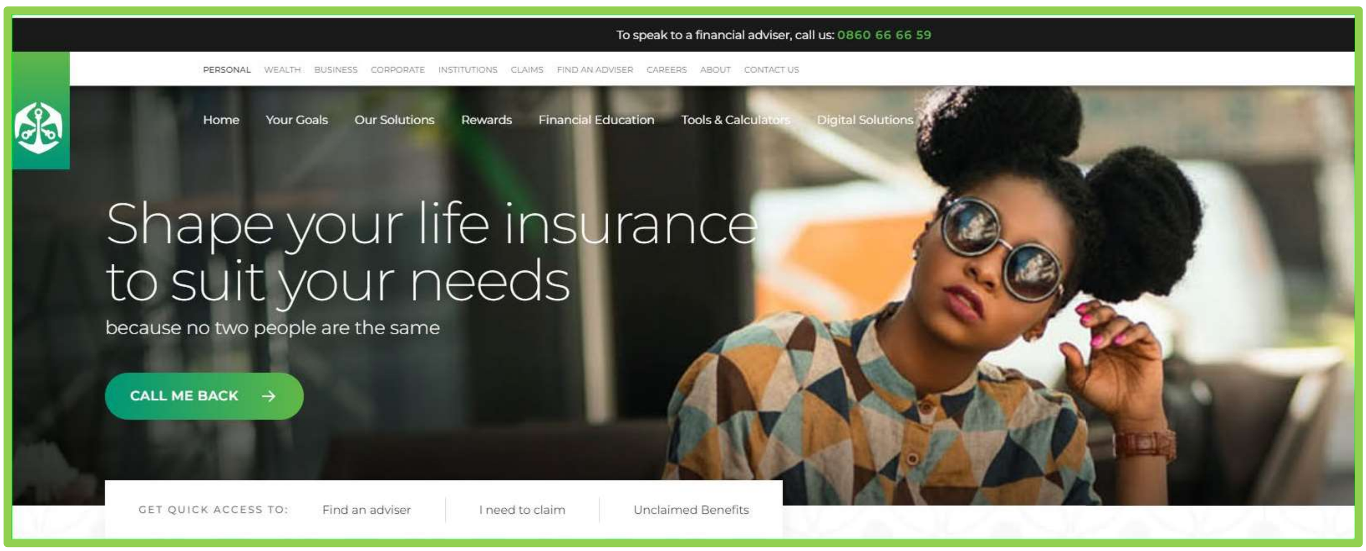
MyClaim User Guide



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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.

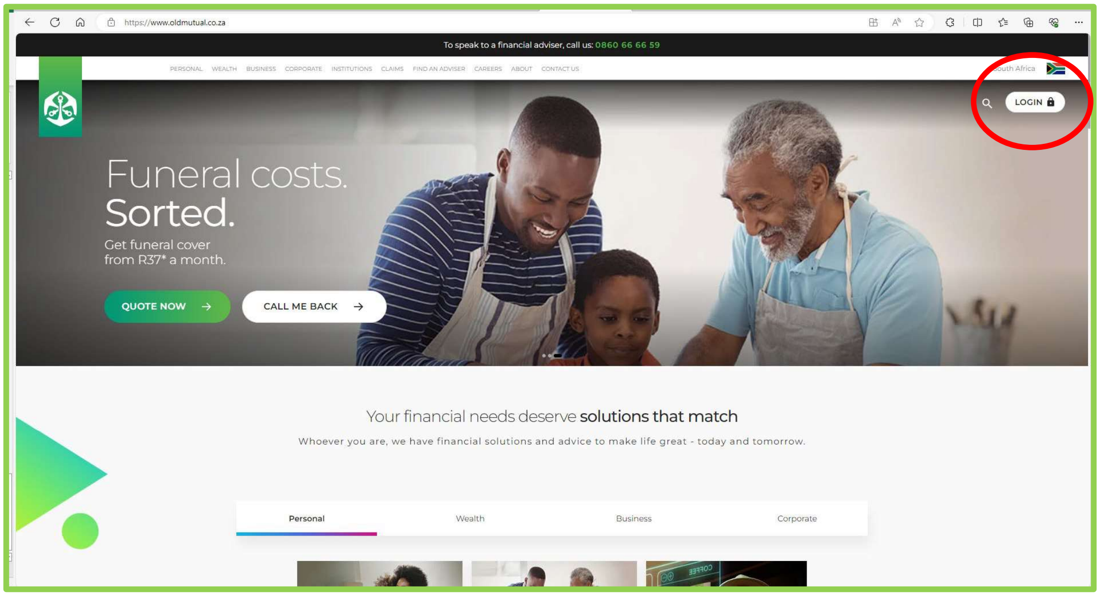
The member will not be able to track his claim on **“MyClaim”** once it has been submitted.

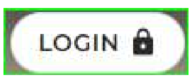
Member will receive automated SMS messages and emails as the claim processing progresses.

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

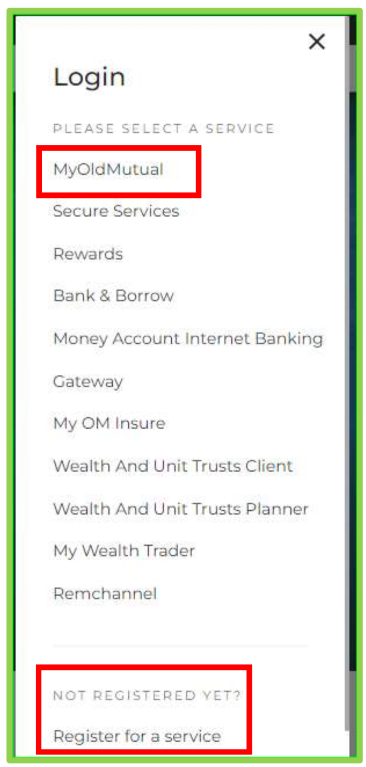
Link to https://oldmutual.co.za/



Select the 

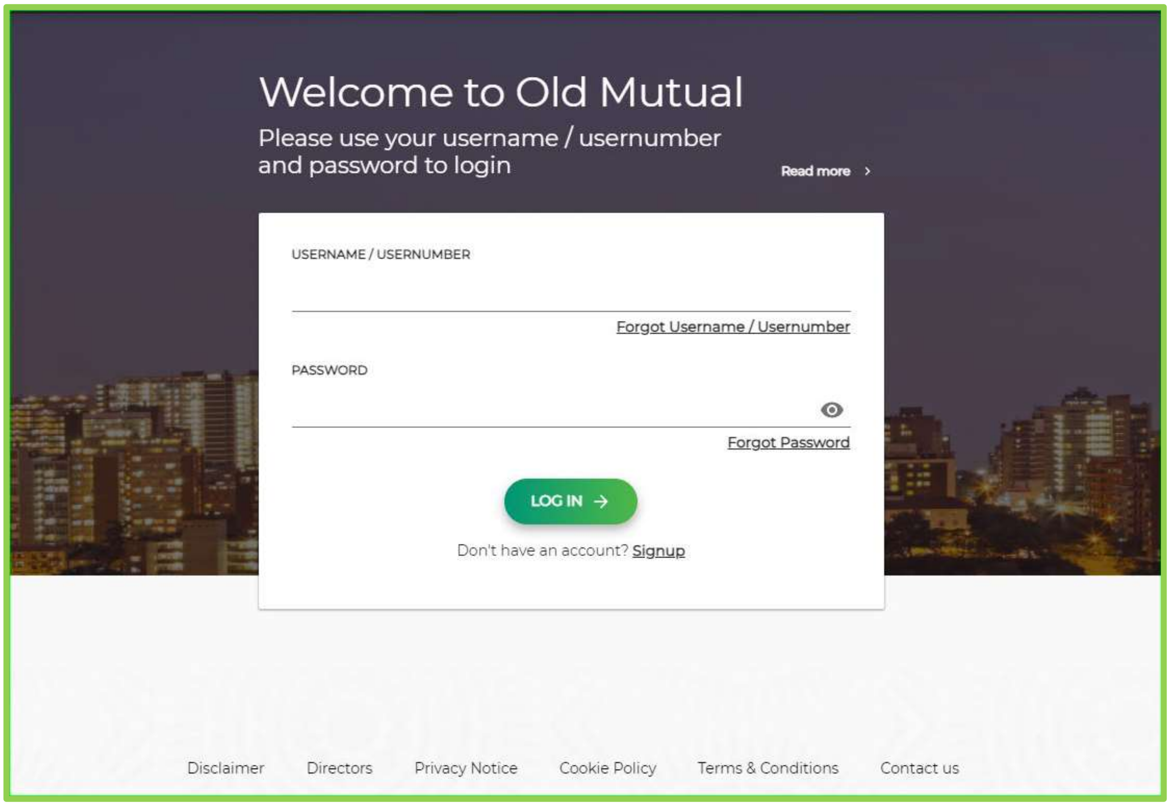
button and the following vertical navigation menu is displayed!

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



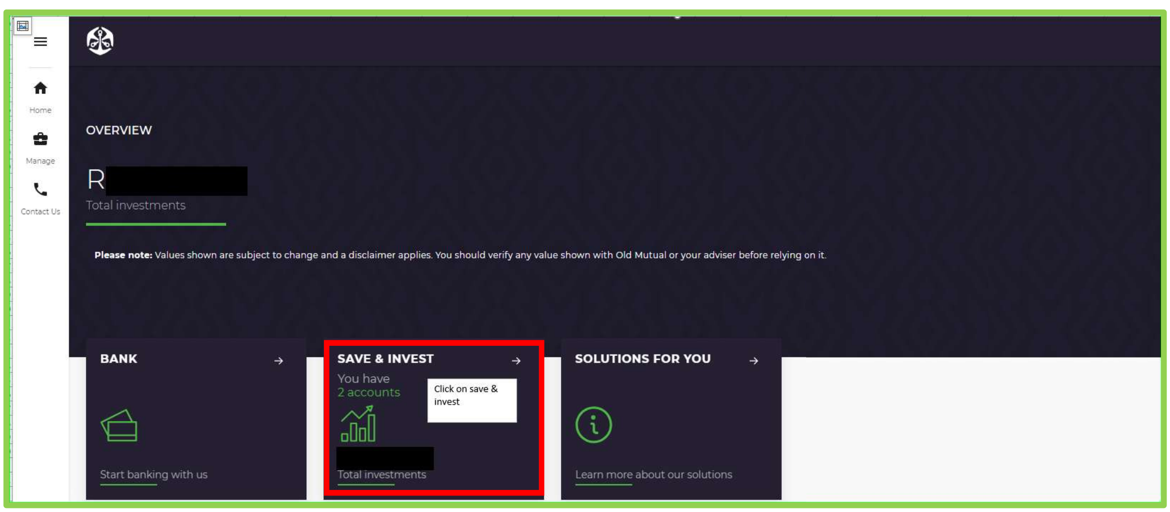
Note: If you do not have an account, click on the **"Register for a service"**, and follow the registration steps to get access.

Complete the form with your username / usernumber and password to .

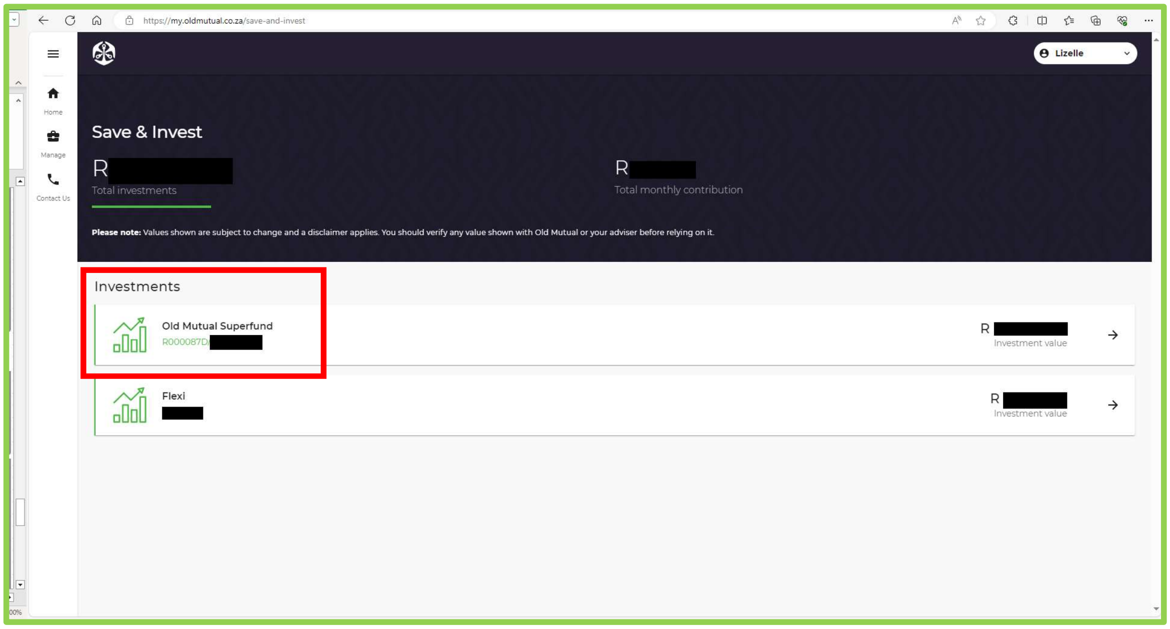


Note: If you do not have an account, click on the **"Signup"** option, and follow the registration step. Link to document on [**"How to Signup"**].

Click on **"Save & Invest"**

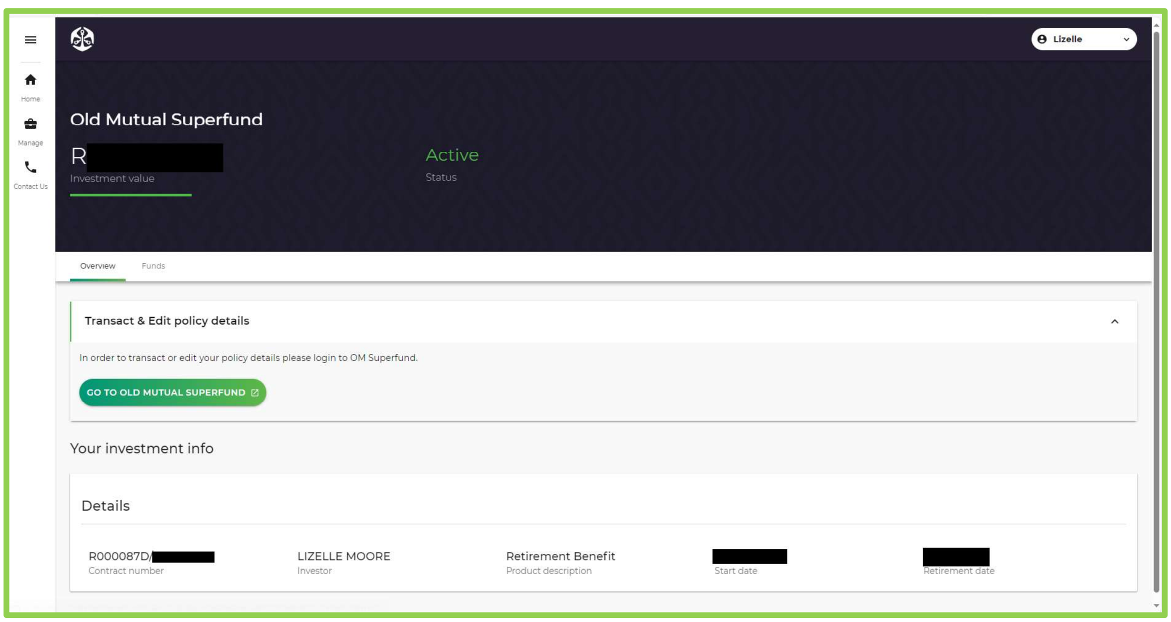


Click on the relevant membership/contract. For MyClaim, select Old Mutual SuperFund listed under Investments

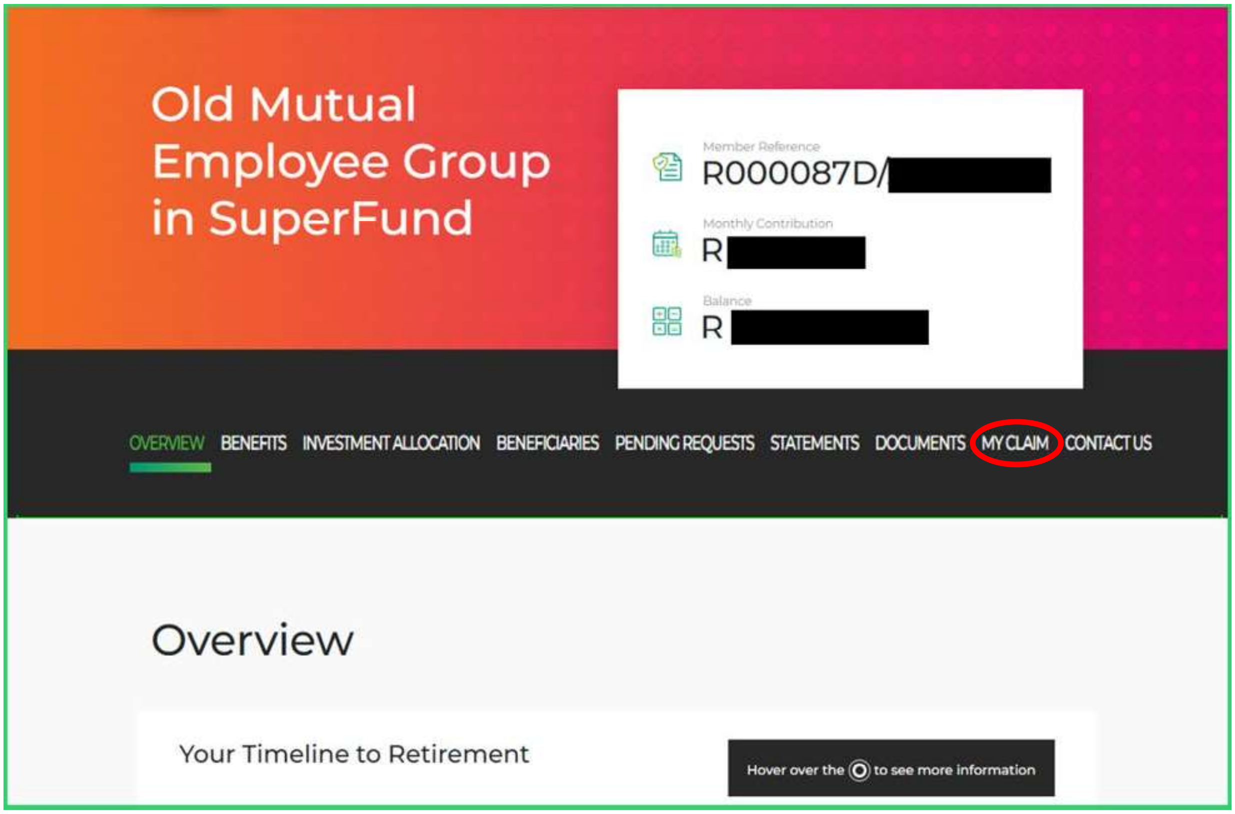


Click on 

to access the Member WEB.



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



Hover over the 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

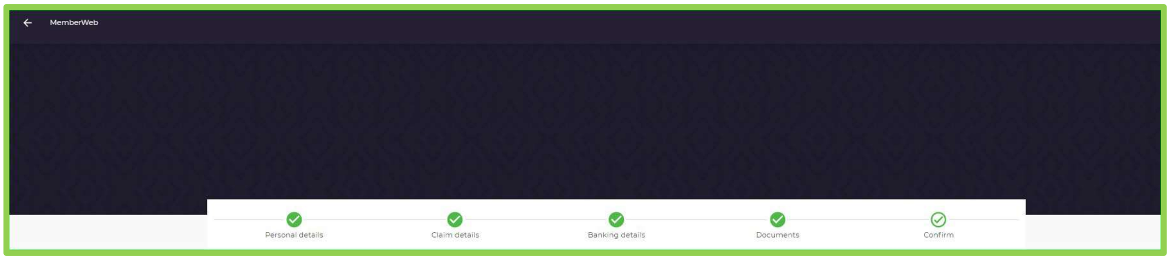
Steps to complete

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

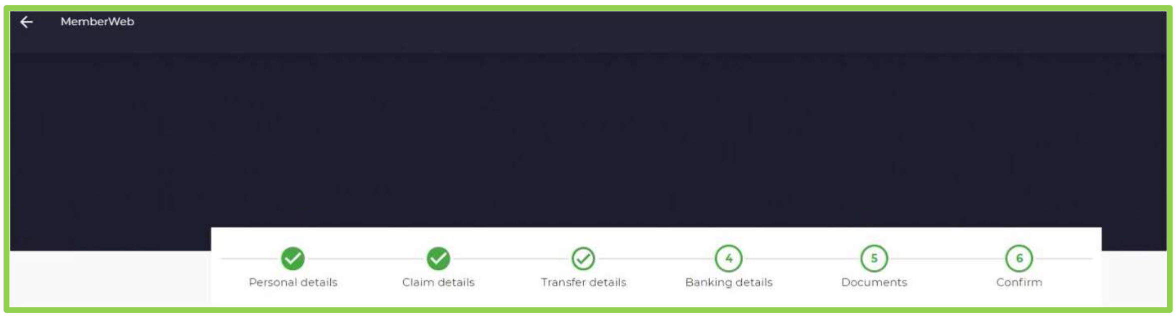
The picture below illustrates the **"Stepper"** which is dynamic. It updates automatically based on the member's Benefit Option selection.

"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

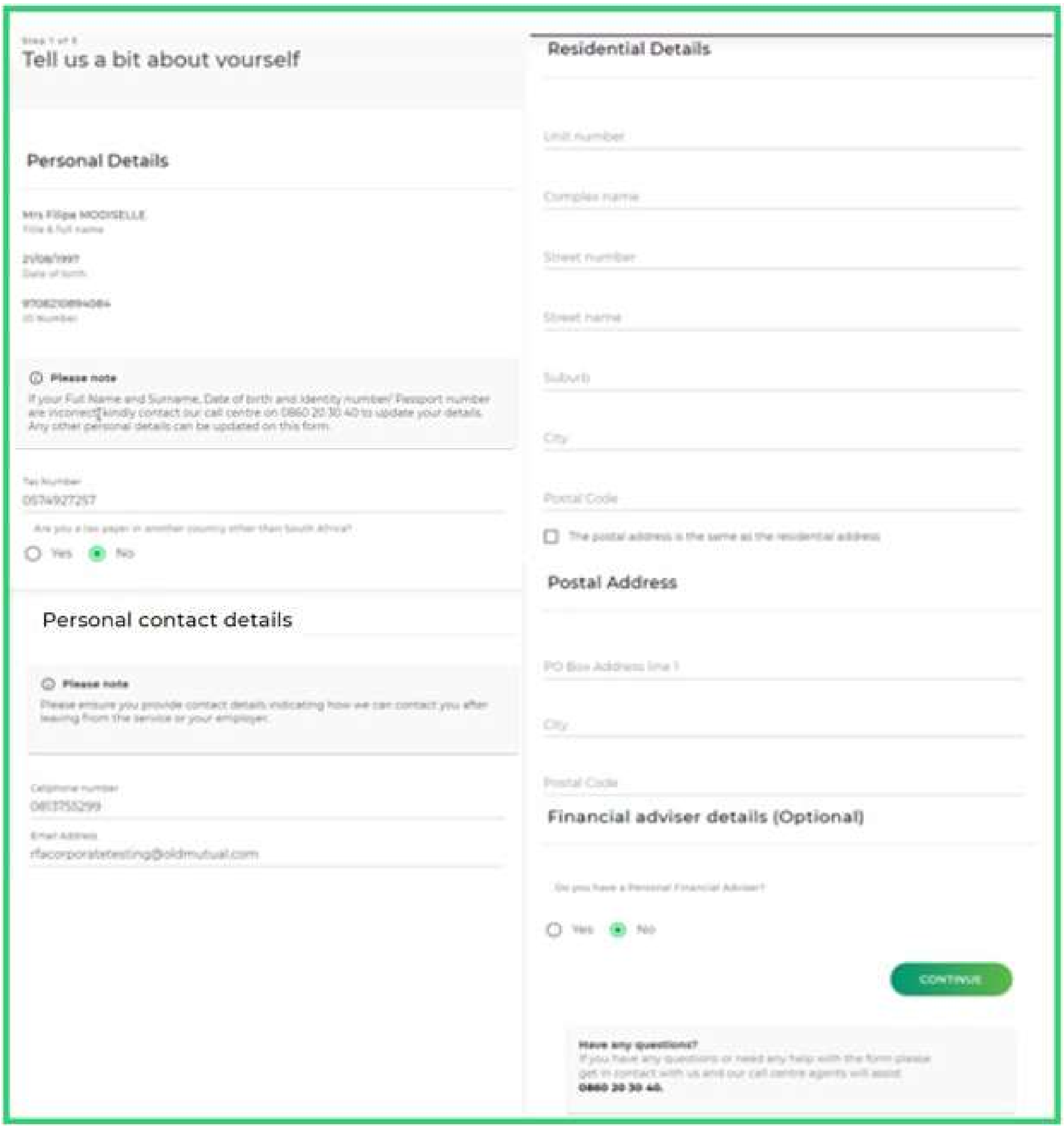
STEP 1 - "Personal Details"

"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.



"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.

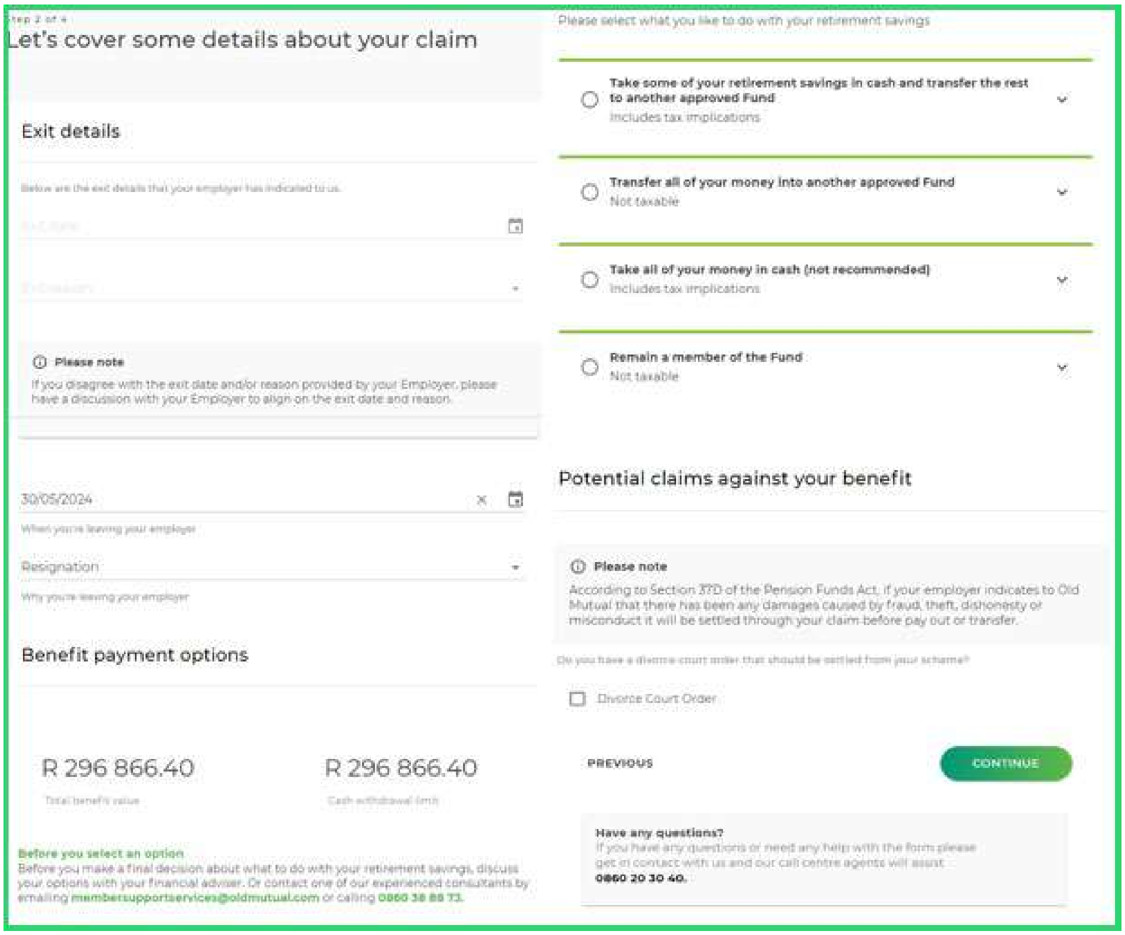
Click the 

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**.



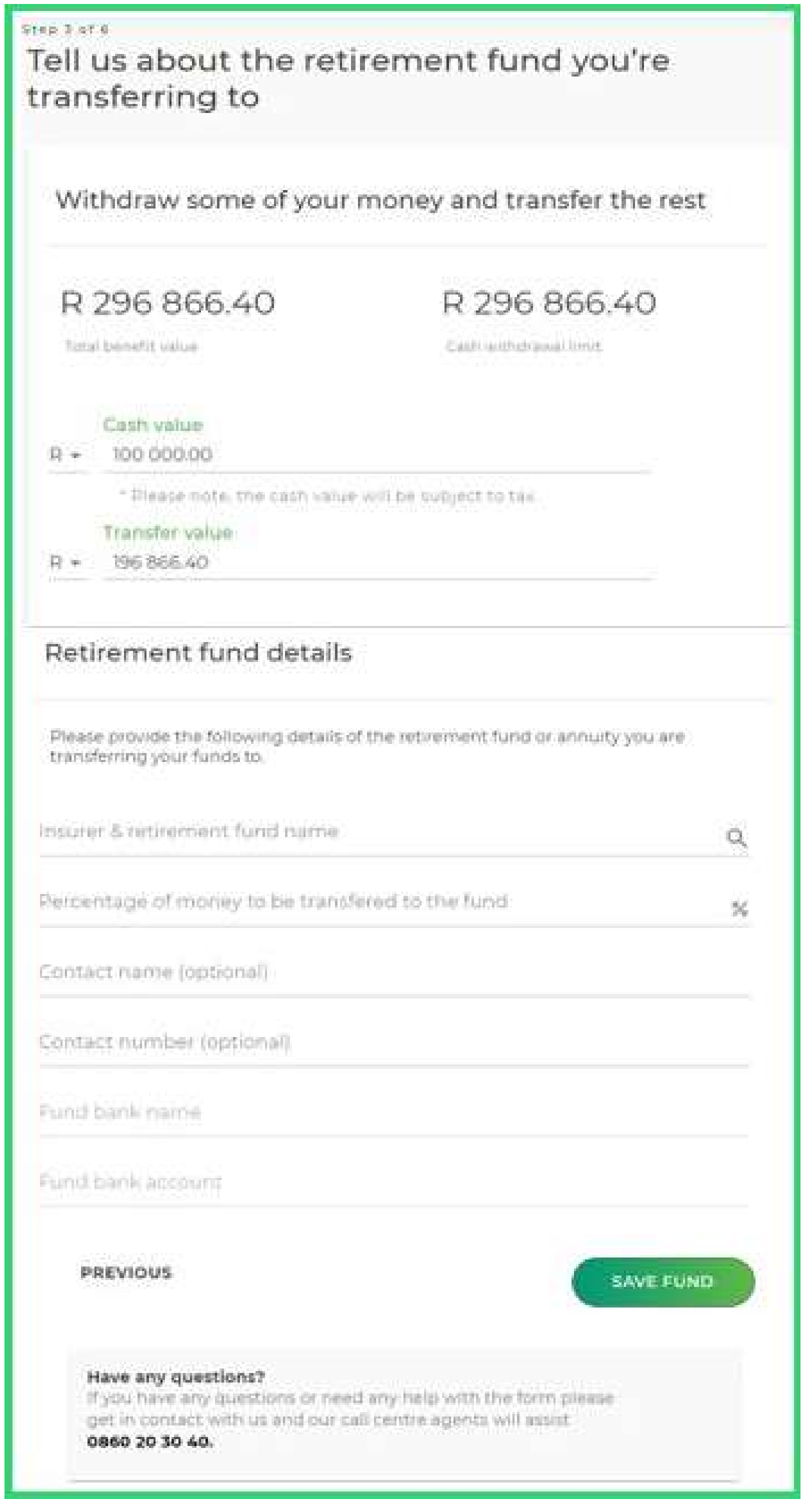
Note: If the member needs to update the **“Exit Reason”** from a Withdrawal Type to a Retirement Type or vice versa then the claim must be deleted and captured as a new claim.

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.



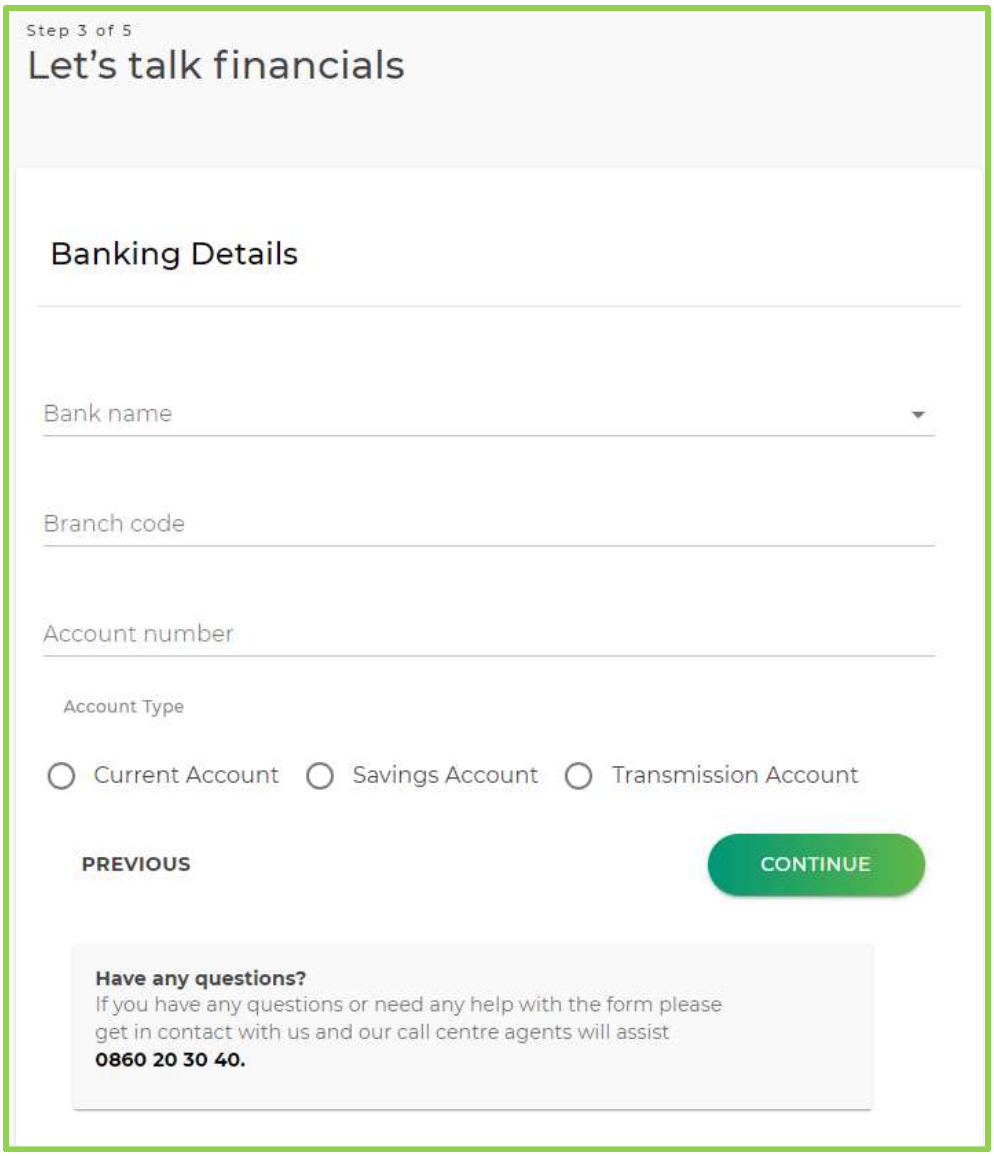
Click SAVE FUND button

Click the CONTINUE 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 if banking details must be a stamped bank statement, less than 3 months, that is in the members name and ID.

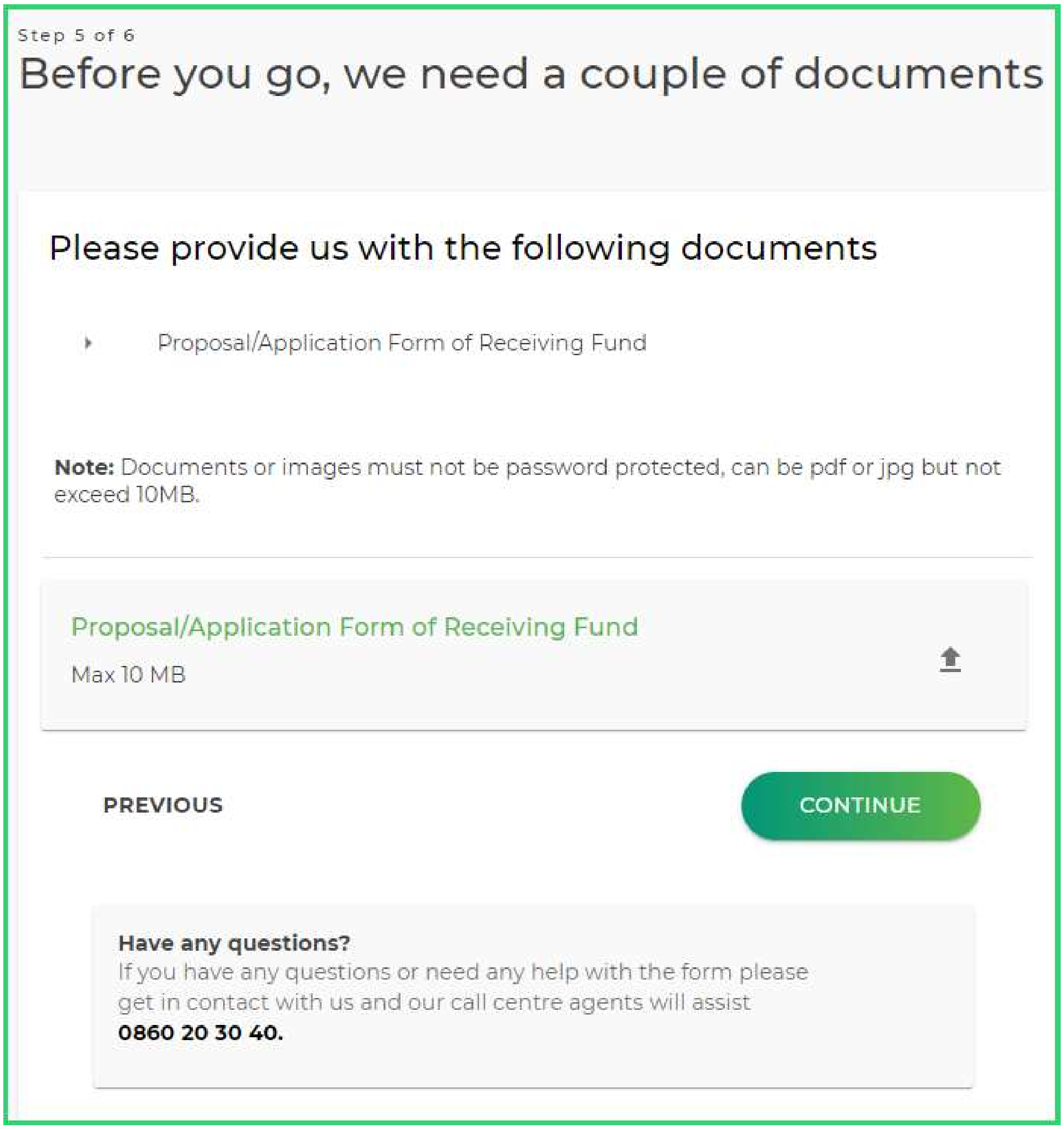


Click the 

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.

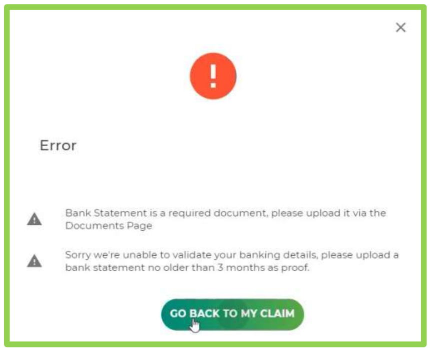


If the member selected **“Transfer”** then the **“Stepper”** will include the **Transfer Details** section and the member will be required to upload the Proposal/Application Form of Receiving Insurer.

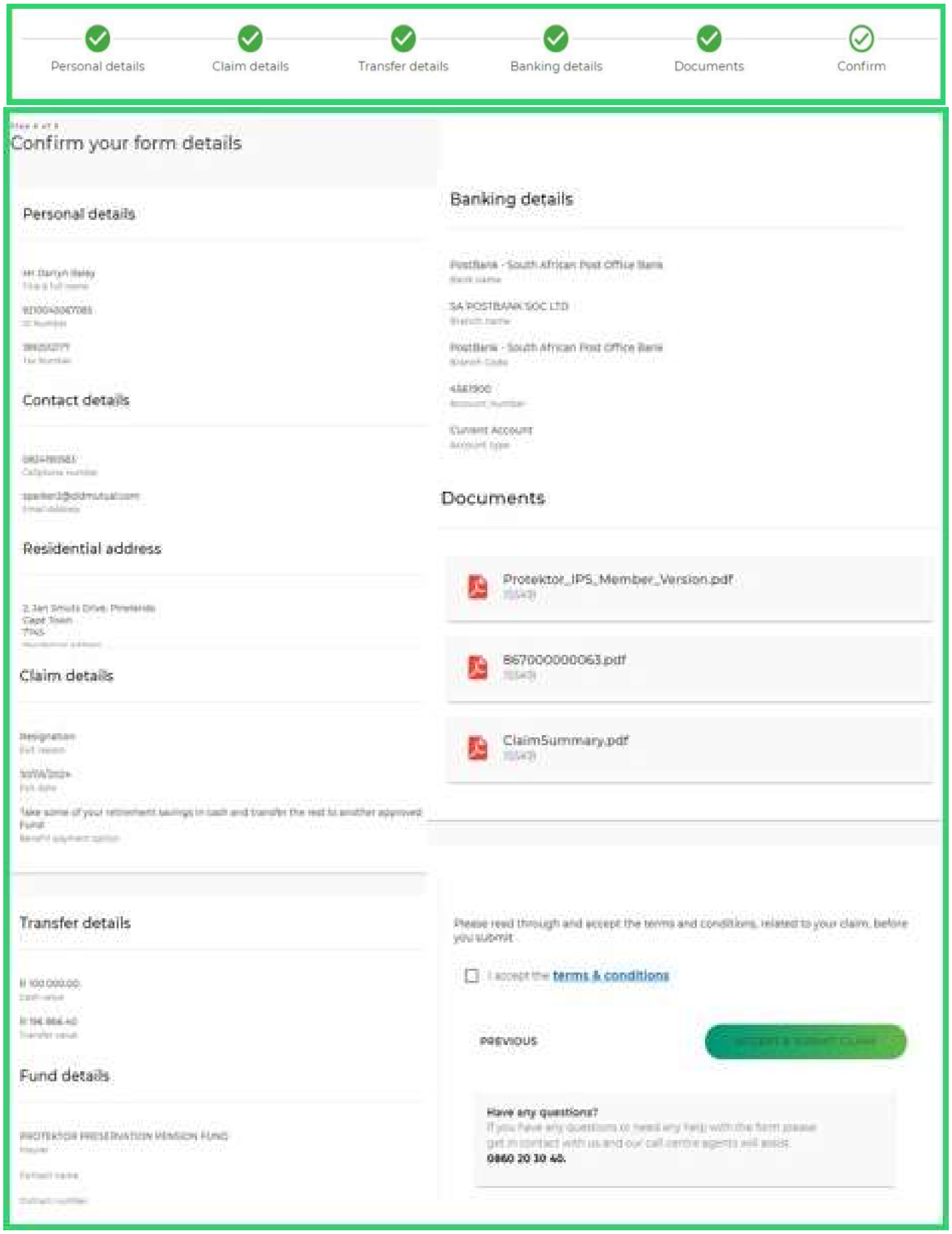
Click the 

button to progress to Confirm.

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



STEP 6 - “Confirm”



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 ACCEPT & SUBMIT CLAIM button.

Final validation checks are run in the background after clicking ACCEPT & SUBMIT CLAIM 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.

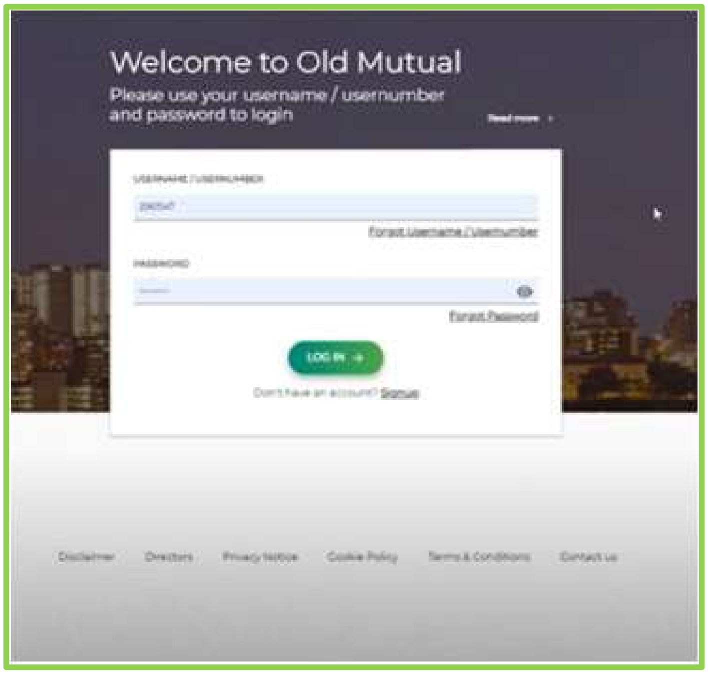
Claim authorisation
Your claim will then be sent to be authorised by our team and the pay out will be triggered.

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 →**

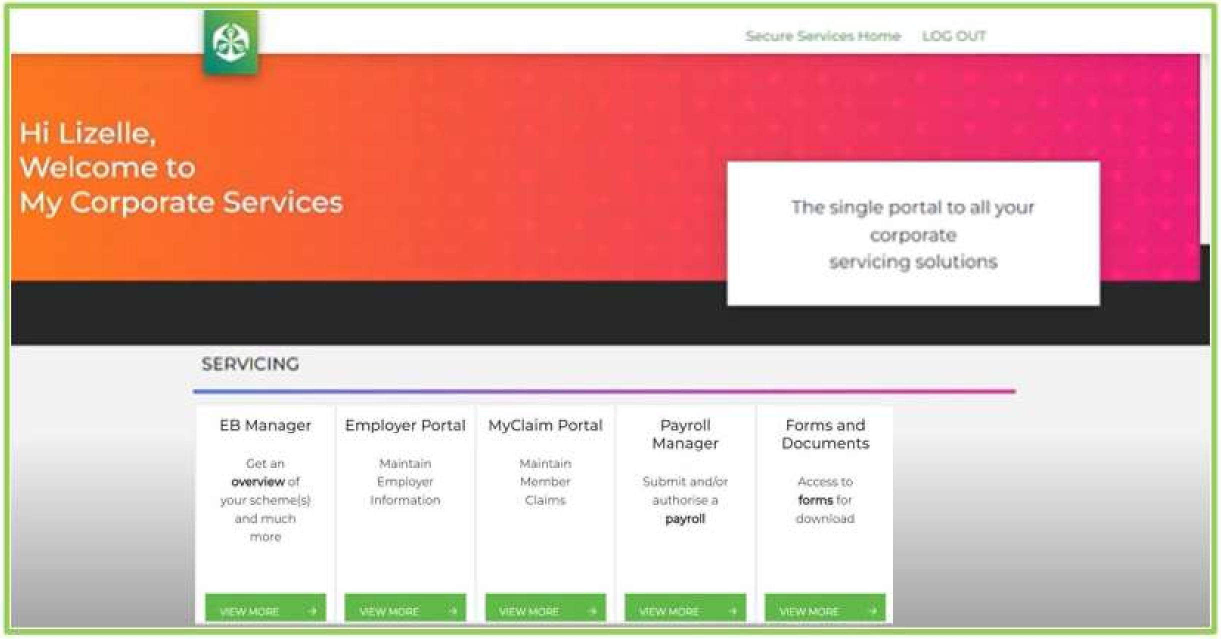
General Information for Call Centre Agents

Log on [Secure Services]()



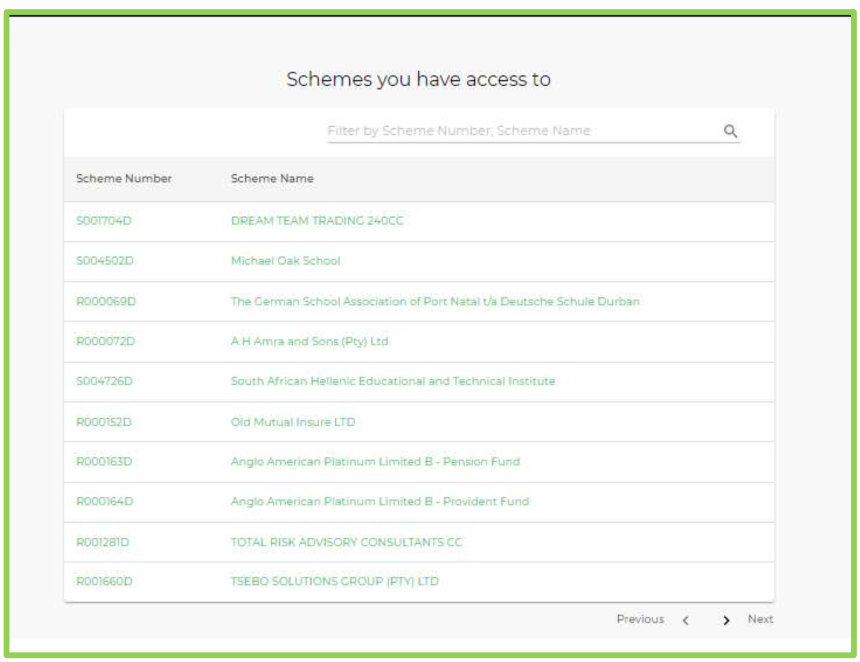
Select **"My Corporate Services"**

Click on the **“MyClaim Portal”** tile

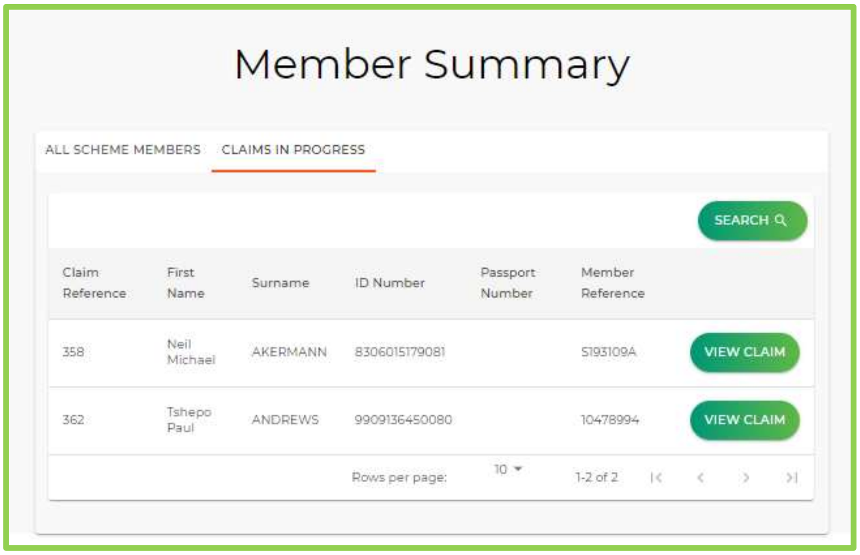


Call centre agents will have access to **ALL schemes** excluding **Staff Fund R000087D**

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



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



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