



NEXT GENERATION FINANCIAL PLANNING

A360 | Enhancements to the health navigation tab and the display of members' contribution information

We've made some exciting upgrades to Adviser 360 to enhance your experience. Here's what you can expect:

Health navigation tab

Medical aid, Flexicare, and Gap cover will all be listed under the 'Healthcare' heading in the **'Your Clients'** tab. This update consolidates all health-related products, enabling you to find what you need more quickly and with less effort.

Contribution enhancements

The following updates and enhancements have been made to the display of members' contribution information, under the 'Plan details' and 'Monthly contributions' tabs on Adviser 360. These changes are designed to enhance the user experience and make the interface more intuitive.

1. Billing information

- An indicator has been added to reflect when the member's **premium is payable** – either at the beginning or end of the benefit month.
- **The debit order date will now be displayed** when the contribution, or a portion of it, is paid by the member.
- **The Vitality freemium period** and the date the first Vitality contribution will become due will be displayed.
- You will be able to see if the **contribution is split** between the member and the employer or the pension fund.
- **Late Joiner Penalty (LJP)** will be displayed per dependant, where applicable.

2. Member's bank details

- The **member's bank details** will be displayed for contribution collections and for claim refunds. The contribution banking details will be displayed even if the member doesn't pay a part, or all of the premium. Only **the last four digits of the bank** account will be shown for privacy.
- If no contribution or claim refund banking details are loaded for a member, **"The member has not supplied contribution bank details"** will be displayed.

These enhancements are part of our ongoing commitment to improving your experience on Adviser 360. With clearer navigation and more intuitive contribution details, managing your clients' healthcare needs is now simpler and more efficient. Be sure to explore the updates and enjoy a smoother, smarter way of working.