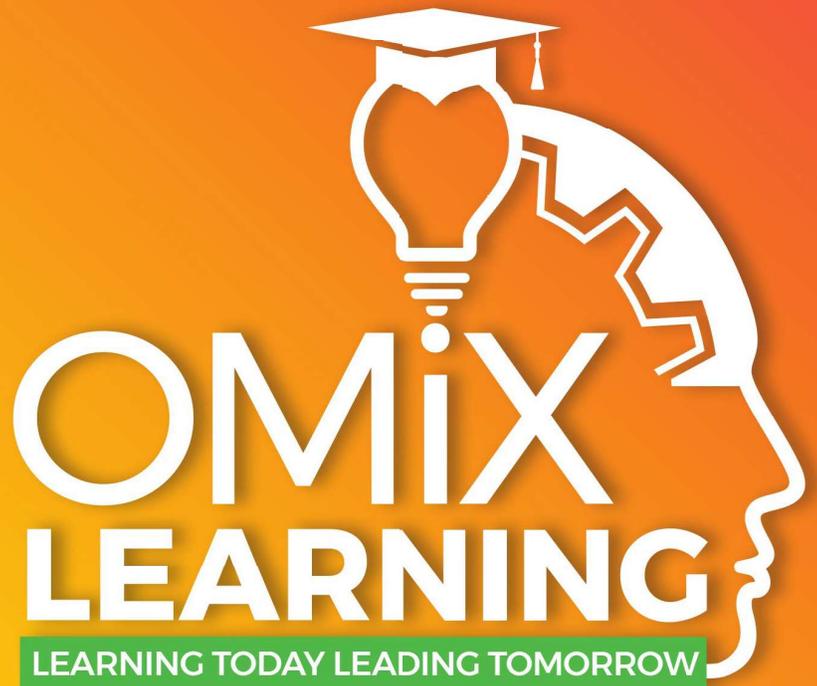


OLDMUTUAL



OLD MUTUAL

MYCLAIM - MEMBER GUIDE



DO GREAT THINGS EVERY DAY



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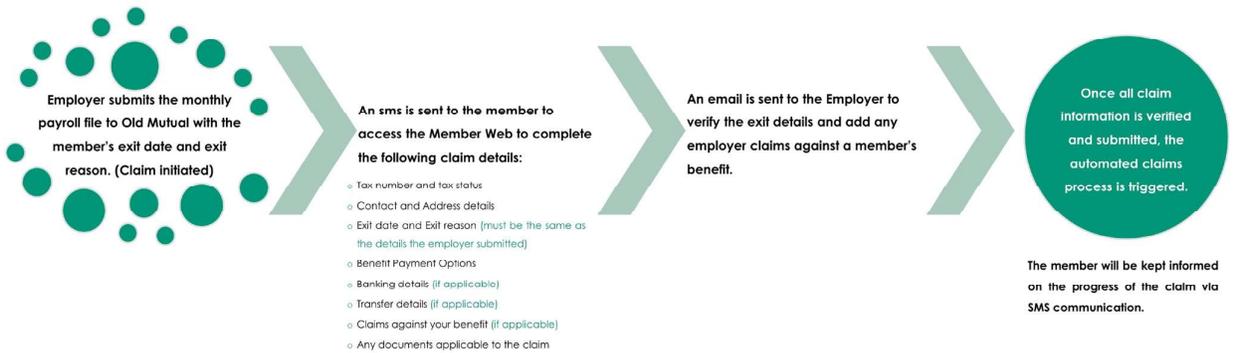
PURPOSE OF THIS GUIDE

Old Mutual is offering a secure digital channel where members of a Retirement Fund can submit their Withdrawal or Retirement Claims. This guide explains how Retirement Fund Members can use this new service that allows a member of a retirement fund to submit exit details and supporting documentation via the existing Member Web.

A withdrawal or retirement claim can be initiated via Payroll (current process) or the member using the MyClaim portal (New). When a claim is initiated, the details must be confirmed by both parties (Member and Employer).



Employer Initiated Claim (Payroll)



Member Initiated Claim





BENEFITS OF THIS CHANGE

The introduction of the new digital channel aims to improve the member's claim experience.

- Secure, real-time claims submission for members.
- Members can submit claims and transact digitally with ease.
- Seamless submission of claim option from members into the systems.
- Members have access to information and tools to elect options for withdrawal and retirement benefits.
- Real-time validation and feedback to members on requirements.
- Members are kept informed of the progress of their claims and requirements throughout the process.
- Claim cycle times are reduced.



GLOSSARY OF TERMS

Important terminology or information to be aware of when using this guide.

TERM	DESCRIPTION
Exit Date	<ul style="list-style-type: none">• This is the date that services ended with your employer. The date must be captured as the last day of the month.• E.g.: When your last month of employment is March, the exit date captured/selected must be 31 March, in the following format dd/mm/yyyy. <p>Note: This date must be the same as the exit date that your employer submitted/captured to prevent a delay in your claims process. Please confirm this date with your employer before capturing your claim information.</p>
Exit Reason	<ul style="list-style-type: none">• The following exit reasons are available for selection when you leave your employer (withdrawal)<ul style="list-style-type: none">○ Resignation○ Dismissal○ Retrenchment• When you retire from your employer, i.e.: early retirement, normal retirement, or late retirement, you will select the following as the exit reason:<ul style="list-style-type: none">○ Retirement• When you retire from your employer due to ill health, you will select the following as the exit reason:<ul style="list-style-type: none">○ Ill-health Retirement <p>Note: The exit reason must be the same as the exit reason that your employer submitted/captured to prevent a delay in your claims process. Please confirm and agree on the exit reason with your employer before capturing your claim information.</p>
MOM	<ul style="list-style-type: none">• MyOldMutual
ROT	<ul style="list-style-type: none">• Recognition of Transfer
SSA	<ul style="list-style-type: none">• Secure Services Application



SECURE SERVICES – MEMBER REGISTRATION

Members who do not have access to the **Member Web** (MyOldMutual) must register for the service on the Old Mutual Secure Services site. It takes approximately **24 hours** for an individual's profile to reflect on my secure services after registration.

Old Mutual Secure Services is an online facility that allows you to closely monitor your retirement fund and other products you have, all in one place.



HELP DURING ONLINE REGISTRATION/LOG-IN

If you are experiencing challenges with the Secure Services registration or login process, please clear your **browser data**. Should challenges persist, send an email to **help-secure@oldmutual.com** for assistance or call us on **0860 60 65 00**.

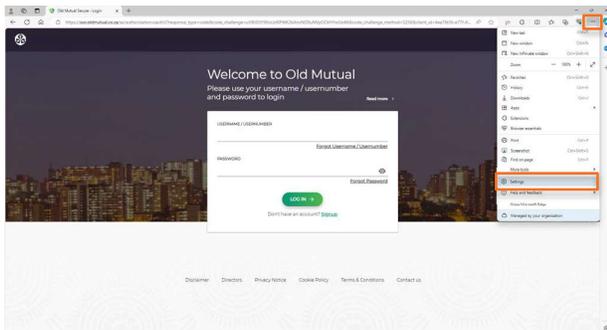


CLEARING BROWSER DATA

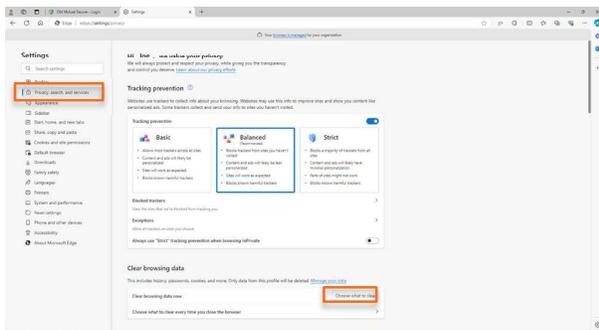
The steps to clear the browser may differ depending on the Browser that is used.

Microsoft Edge

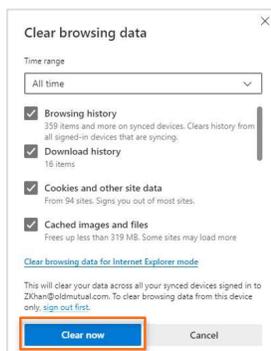
- Click on the **3 dots (an ellipsis)** at the top of the browser page.
- Select **SETTINGS** from the dropdown menu



- Select **PRIVACY, SEARCH AND SERVICES**
- Click on the **CHOOSE WHAT TO CLEAR** button

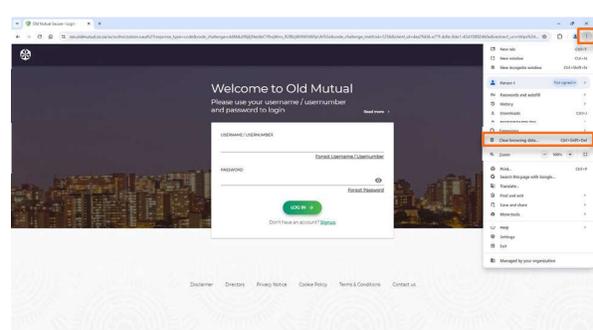


- Ensure that the "Time range" is **ALL TIME**
- Click on the **CLEAR NOW** button

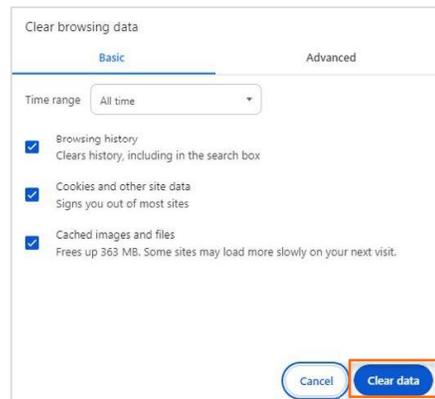


Google Chrome

- Click on the **3 dots (an ellipsis)** at the top of the browser page.
- Select **CLEAR BROWSING DATA** from the dropdown menu



- Ensure that the "Time range" is **ALL TIME**
- Click on the **CLEAR DATA** button



When browser data has been cleared, you can continue with the registration process.

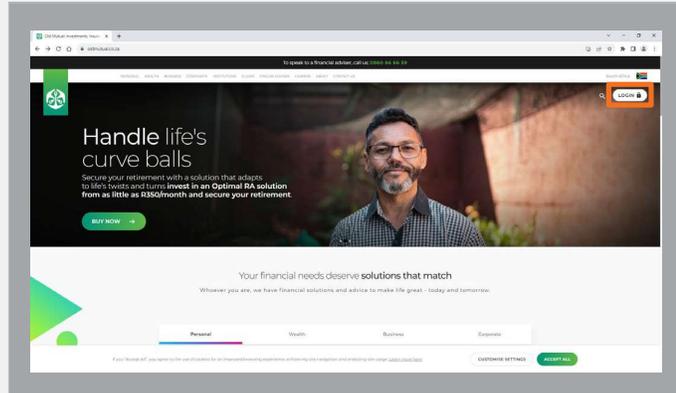
STEP 1

- Go to the Home page **oldmutual.co.za** in a browser.



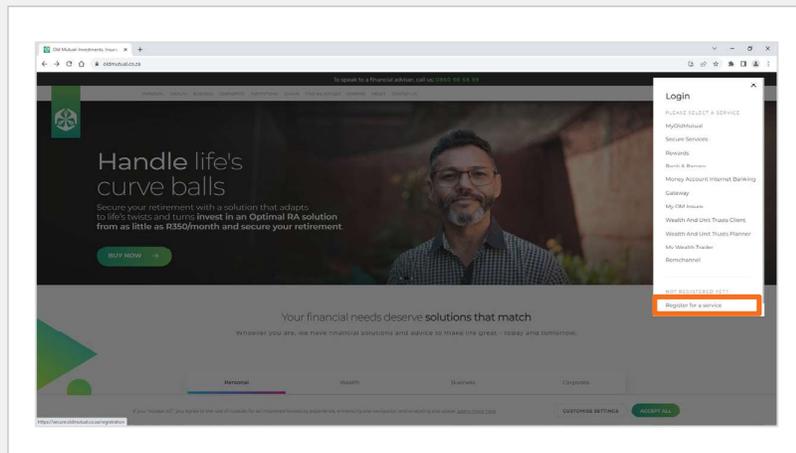
STEP 2

- Click on the **LOGIN** button.



STEP 3

- To register, select "**Register for a Service**" from the dropdown menu.



STEP 4

- Complete all **Personal and Contact** information.

Note: When the ID TYPE is "Passport", the "Country of Issue" must be selected from the dropdown menu.

The screenshot shows the 'OLD MUTUAL SECURE SERVICES REGISTRATION' page. At the top, there are 'REGISTER' and 'LOG IN' buttons. Below the title, a progress indicator shows three steps: 1. PERSONAL DETAILS (highlighted in green), 2. LOGIN DETAILS, and 3. DONE. The main form area is titled 'Tell us about yourself' and contains several required fields:

- * Required fields**
- * FIRST NAMES (as they appear on your ID or passport)**: Input field with 'Joe' entered.
- * SURNAME (as it appears on your ID or passport)**: Input field with 'Soap' entered.
- * ID TYPE**: Dropdown menu with 'South African ID' selected.
- * ID NUMBER**: Input field with '6909015123089' entered.
- * DATE OF BIRTH (dd/mm/yyyy)**: Input field with '01/09/1969' entered.
- Please make sure you have your cellphone with you, as you will need it on the next step**
- * COUNTRY CODE**: Dropdown menu with 'South Africa (+27)' selected.
- * CELLPHONE NUMBER**: Input field with '083 123 4567' entered. Below the field is the text 'e.g. 0833333333'.

At the bottom of the form, there are two checkboxes:

- I agree to the [terms and conditions](#)
- I'm not a robot

A green button at the bottom right of the form reads 'NEXT: CHOOSE YOUR LOGIN DETAILS'.

STEP 5

- Select the **Terms & Conditions** tick box to accept.
- If not ticked, an **error message** will appear, and you cannot continue the registration process.
- Click the **Terms & Conditions** link to read the terms and conditions. When you click on the link, the Terms and Conditions will open in a **separate tab**.
- The Terms and Conditions can be printed by scrolling to the bottom of the screen and selecting the **PRINT** button.
- **Switch between tabs** to go back to the **Registration** process.

The image displays two screenshots from a web browser. The left screenshot shows the 'OLD MUTUAL SECURE SERVICES REGISTRATION' page. It features a progress indicator with three steps: 1. PERSONAL DETAILS (highlighted), 2. LOGIN DETAILS, and 3. DONE. The form is titled 'Tell us about yourself' and includes fields for 'FIRST NAMES', 'SURNAME', 'ID TYPE', 'ID NUMBER', 'DATE OF BIRTH', 'COUNTRY CODE', and 'CELLPHONE NUMBER'. A checkbox labeled 'I agree to the terms and conditions' is highlighted with an orange box, and an orange arrow points from it to the right. Below the form is a 'NEXT: CHOOSE YOUR LOGIN DETAILS' button.

The right screenshot shows a browser window with two tabs: 'Register' and 'Old Mutual - Terms and Conditions'. The 'Old Mutual - Terms and Conditions' page is active and contains the following text:

- Portfolio information obtained through MyPortfolio is not intended for use by third parties. We are not liable for any claim against us as a result of a third party having acted on the information contained in a MyPortfolio report.
- We have also created a mobile MyPortfolio application which can be downloaded onto compatible smart devices. A different set of terms and conditions applies to the mobile application in addition to these terms and conditions.

Manage User Access (delegated authority)
By accepting the delegation you hereby agree that:

- you will be provided with access to sensitive proprietary information of Old Mutual ("Confidential Information"),
- the afore-mentioned Confidential Information includes customer "Personal Information" as defined in the Protection of Personal Information Act of 2013 ("PIPI"), hence, the actions that you have been delegated to carry out in relation to the Confidential Information results in the processing of customer Personal Information,
- you shall comply with all of the necessary provisions of PIPI when Personal Information is processed,
- you are only allowed to process the respective Personal Information in accordance with purposes for which you have been delegated, and
- you indemnify Old Mutual against any:
 - loss that it may suffer as a result of Confidential information being accessed, and
 - claim that may be brought by a Data Subject (as defined in PIPI) in respect of any Personal Information being processed, for purposes other than what you have been delegated.

Use of your personal information

- Personal information means any detail that by itself or when combined with other details may identify you as a specific individual. Secure Services only collects personal information that you voluntarily provide so that we can allow you access to our products and services.
- Secure Service uses encrypted cookies that contain personal information relating to you to transfer data on a fund or a scheme. We have adequate security measures in place to monitor the use of cookies, which we do by reviewing the log files or databases that track cookies to verify that the security procedures are being complied with.
- We may intercept, monitor, read, filter, block and act on any electronic communications and stored files generated, sent or otherwise kept by you in Old Mutual's computer systems accessed through Secure Services. This is to protect our electronic information assets and to ensure compliance with relevant legislation including the Regulation of Communications and Provision of Communication-related Information Act, 2002.
- You consent to us disclosing your personal details to organisations within the Old Mutual Group.
- We may use your ID or passport number, email address or cellphone number to authenticate you for any telephonic contact with the Old Mutual Secure Services contact centre.
- We will never sell or share your personal information with any third party outside of the Old Mutual Group.

Old Mutual Life Assurance Company (South Africa) Limited, a member of the Old Mutual Group, is a company incorporated in South Africa, with registration number 1999/004643/06 and with its registered address at Mutualpark, Jan Smuts Drive, Pinelands, 7405, South Africa.

"Old Mutual Group" means Old Mutual plc, a company incorporated in England and Wales, with registered number 3591559 and with its registered address at 5th Floor, Old Mutual Place, 2 Lambeth Hill, London, EC4V 4GG and includes all its subsidiaries that directly or indirectly, control, are controlled by, or are under common control with Old Mutual Life Assurance Company (South Africa) Limited. For purposes hereof, the term "subsidiaries" shall have the meaning ascribed thereto in Companies Act 71 of 2008, as amended.

Version: 15 November 2017

PRINT

Disclaimer | Directors | Privacy Policy | Cookie Policy | Terms and Conditions | Contact Us

STEP 6

- Select the **I'm not a Robot** tick box.
- Follow the ReCAPTCHA **verification** steps.
- Click on the **NEXT: CHOOSE YOUR LOGIN DETAILS** button.

The image displays two screenshots from the Old Mutual Secure Services Registration process. The left screenshot shows the 'Tell us about yourself' form with the following fields:

- FIRST NAMES**: Joe
- SURNAME**: Soap
- ID TYPE**: South African ID
- ID NUMBER**: 6909015123089
- DATE OF BIRTH**: 01/09/1989
- COUNTRY CODE**: South Africa (+27)
- CELLPHONE NUMBER**: 083 123 4567

At the bottom of the form, there is a checkbox for 'I agree to the terms and conditions' and a checkbox for 'I'm not a robot'. An orange arrow points from the 'I'm not a robot' checkbox to the right screenshot.

The right screenshot shows the ReCAPTCHA verification step. The prompt is 'Please select all images with stairs'. The user has selected three images showing stairs. The 'VERIFY' button is highlighted with an orange box.

STEP 7

- Follow the guidelines and **CREATE USERNAME**
- Follow the guidelines and **CREATE PASSWORD**

PLEASE NOTE:

The **green ticks** next to the username and password indicate that the fields were completed correctly. *These details should not be shared with anyone.*

- Insert the **4-digit code** sent to your cell phone number.
- Click on the **COMPLETE REGISTRATION** button.

Choose your **login details**

* Required fields

CREATE USERNAME

- Must be **at least 6 characters long**, without any spaces
- Do not use the following special characters: #/%=@!~*^<->*
- **Not** case sensitive

* USERNAME

KurtWilliams@123 ✓

CREATE PASSWORD

- Longer passwords are harder to crack. Use **8 - 16 characters**, without any spaces.
- Use a password phrase e.g. Take me out to the Ball Game! = Tmo2tBG!
- Use a different password for social, personal and work accounts, make it unique.
- Your password **should not contain your username and personal details**.
- Use at least one uppercase, lowercase, special character and number.
- Avoid names, places and dictionary words (In any language).

* PASSWORD

..... SHOW ✓

* CONFIRM PASSWORD

..... SHOW ✓

VERIFY YOUR CELLPHONE NUMBER

We have sent you an SMS. Your code will expire in 5 minutes. > > * 4-DIGIT CODE

6815 ✓

6815

COMPLETE REGISTRATION

PLEASE NOTE:

Once you have finalised this registration, it will take 24 hours for your personal details to reflect on the system, however, you will have access and can log in.

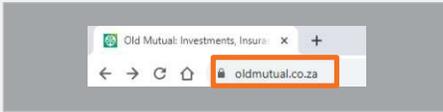


SECURE SERVICES – EXISTING MEMBER

All registered members will follow these steps to log in:

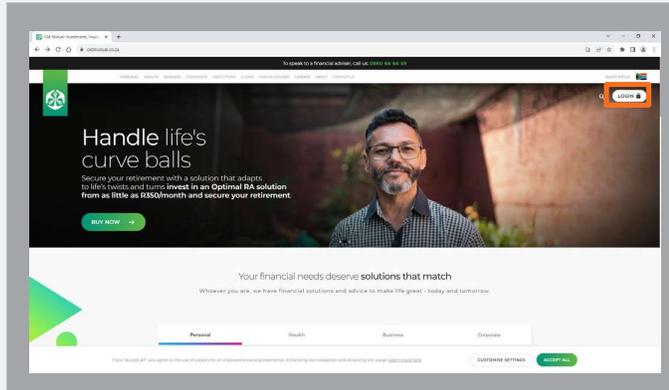
STEP 1

- Go to the Home page **oldmutual.co.za** in a browser.



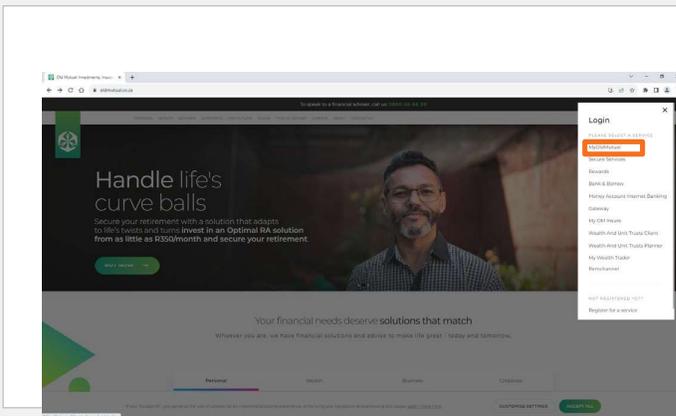
STEP 2

- Click on the **LOGIN** button.



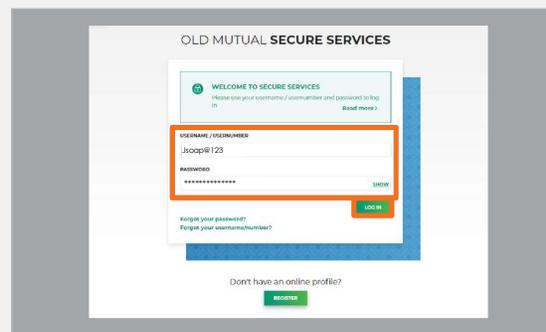
STEP 3

- Select **MyOldMutual** from the dropdown menu.



STEP 4

- Insert **USERNAME** and **PASSWORD**.
- Click on the **LOGIN** button.





MYCLAIM – MEMBER

Once logged in, an overview page will be displayed. A member must follow these steps to submit a claim:

STEP 1

- Select the **SAVE & INVEST** link.

The screenshot shows the 'OVERVIEW' page for a member named Joe. The total investment value is R 43 224.10. Below this, there are three main sections: 'BANK', 'SAVE & INVEST', and 'SOLUTIONS FOR YOU'. The 'SAVE & INVEST' section is highlighted with an orange border and contains the following information:

- SAVE & INVEST**
- Old Mutual Superfund
- R000123D/S123456A
- R 43 224.10
- Total investments

STEP 2

- Select your **Retirement Fund** Investment link.

The screenshot shows the 'Save & Invest' page for a member named Joe. The total investment value is R 43 224.10 and the total monthly contribution is R 976.98. Below this, there is an 'Investments' section with a table of investment options. The 'Old Mutual Superfund' investment is highlighted with an orange border and contains the following information:

Investment	Investment value
 Old Mutual Superfund R000123D/S123456A	R 43 224.10 Investment value →

STEP 4

- Select the **“GO TO OLD MUTUAL”** button.

The screenshot shows the Old Mutual Superfund dashboard. At the top, there is a navigation menu with icons for Home, Manage, and Contact Us. The main header displays the Old Mutual logo and the user's name 'Joe'. Below the header, the dashboard shows the investment value 'R 43 224.10' and the status 'Active'. A section titled 'Transact & Edit policy details' contains the text 'In order to transact or edit your policy details please login to OM Superfund.' and a button labeled 'GO TO OLD MUTUAL SUPERFUND' with an external link icon, which is highlighted with an orange border.

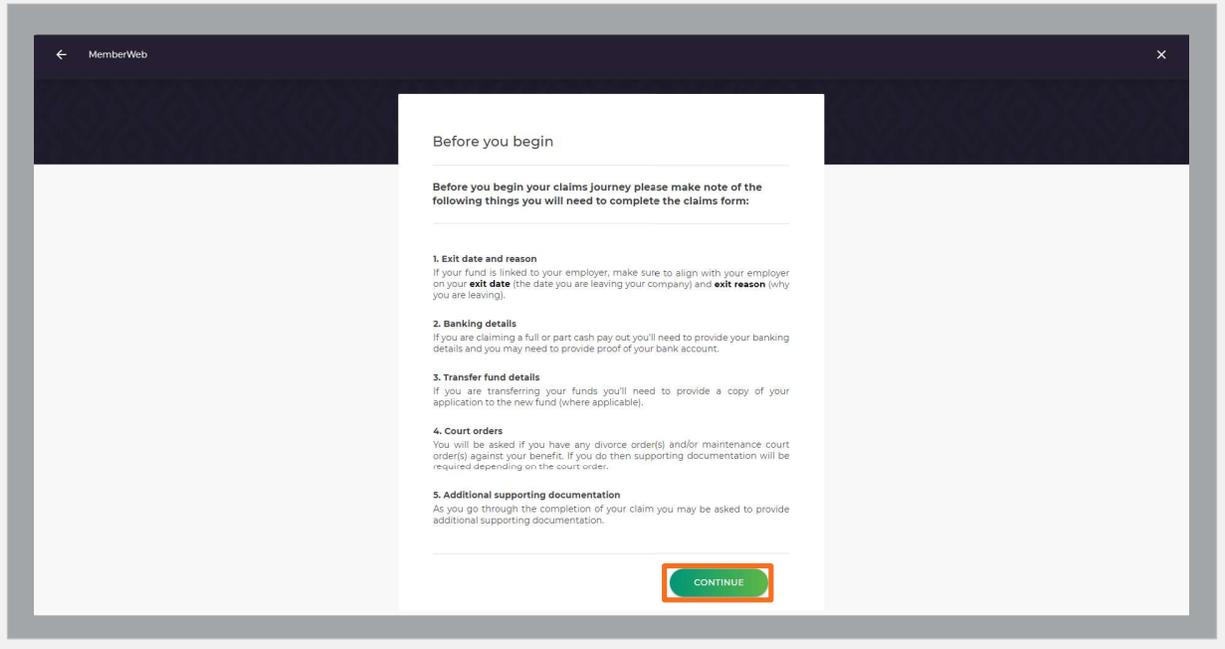
STEP 5

- Select the **“MYCLAIM”** link.

The screenshot shows the Anglo American Platinum Limited B - Pension Fund dashboard. At the top, there is a navigation menu with icons for Home, Manage, and Contact Us. The main header displays the Anglo American logo and the user's name 'JOE SOAP'. Below the header, the dashboard shows the fund name 'Anglo American Platinum Limited B - Pension Fund' and a summary of key information: Member Reference: R000123D/S123456A, Monthly Contribution: R 976.98, and Balance: R 43,224.10. A navigation bar at the bottom contains links for BACK TO MYPORTFOLIO, OVERVIEW, BENEFITS, INVESTMENT ALLOCATION, BENEFICIARIES, PENDING REQUESTS, STATEMENTS, DOCUMENTS, MYCLAIM, and CONTACT US. The 'MYCLAIM' link is highlighted with an orange border.

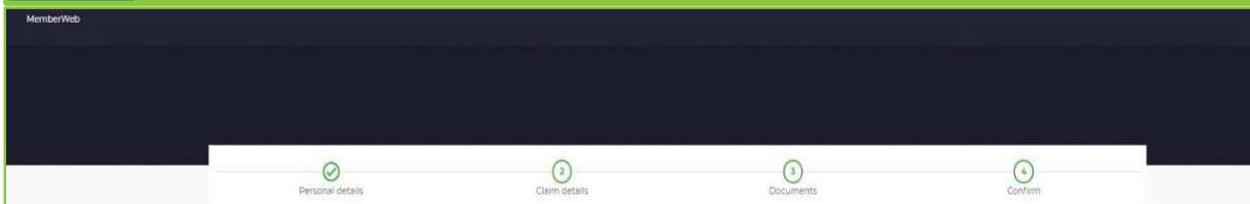
STEP 6

- A box will be displayed with all the requirements that you will need to submit the claim.
- When you have all your required information and documents, click on the **CONTINUE** button.



PLEASE NOTE:

- At the top of the page, it will reflect the **mandatory steps** required to submit the claim.
- This is a **dynamic stepper**, and **additional steps** may be added depending on the **Benefit Payment Options** selected.
- When each section is **completed successfully**, it will be updated with a **green tick**.
- Should you wish to review or update any of the completed sections, you can click on the **PREVIOUS** button on the page or the **mandatory step** at the top of the screen.



STEP 7 – Personal details

- The **Personal Details** (*Name, Date of Birth, and ID number*) reflected on the page is the details that Old Mutual has on record. Should any **updates** be required, kindly **contact the call centre** on 0860 20 30 40 or request your **employer** to update it via the payroll process.
- The **tax number** and **tax status** may be updated if the field is blank or if the details are incorrect.
- The **Contact** and **Address** details must be completed. This information is important to keep you updated on the status of your claim.
- When all the information is checked and updated, click on the **CONTINUE** button to move to the next section.

Step 1 of 4
Tell us a bit about yourself

Personal Details

Mr Joe Soap
Title & full name

21/08/1997
Date of birth

9708215012089
ID Number

Please note
If the above is incorrect please contact our call centre on 0860 20 30 40 to update your details.

Tax number
012345678

Are you a tax payer in another country other than South Africa?

Yes No

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
0811234567

Email address
Jsoap@gmail.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.**

STEP 8 – Claim details

- **Employer exit details** - when details are populated in these fields, it means that your employer has submitted your claim details to Old Mutual via the payroll. If it is blank, your employer will be informed of your claim and will be required to verify and confirm your exit details.
- **Employee exit details** – The **exit reason** and **exit date** must be completed and should correspond to the information submitted by the employer. The applicable Benefit Payment Options (Withdrawal/Retirement) will appear after this information is entered. Should the exit details differ from what the employer inserted, there may be a delay in the claim payment.
- **Benefit Payment Options** – Depending on the selection made here, additional information may be required. Click on the **dropdown arrow** next to each option for more details.
- **Claims against your benefit** – Select if applicable (Supporting documents must be uploaded).
- When all the information is checked and updated, click on the **CONTINUE** button to move to the next section.

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

Exit reason

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.

Benefit payment options

R 89 954.99	R 89 954.99
Total benefit value	Cash withdrawal limit

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 adviser. Or contact one of our experienced consultants by emailing membersupportservices@oldmutual.com or calling 0860 38 88 73.

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 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.**

Benefit Payment Options

- The part cash/part transfer option is an example that will cover most of the Benefit payment options and display the steps required for the other payment options.
- When selecting this option, additional pages/screens called **Transfer details** and **Banking details** are added to the stepper at the top of the screen.

Please select what you like to do with your retirement funds

Take some of your money and transfer the rest to a new retirement fund

Receive a portion of your money in cash directly into your account and transfer the remainder into a new retirement fund or annuity.

- Safeguard the growth of what you transfer
- Subject to tax deductions
- Long term impact on the money saved for your retirement

Transfer all of your money into a new retirement fund
Not taxable

Take all of your money (Not recommended)
Includes tax implications

Safeguard & preserve your money with Old Mutual
Not taxable

On the **Transfer Details** page, the member must do the following:

- **Insert the Cash amount** that the member wants. The balance will be calculated and automatically populated in the **Transfer Value** field.
- In the Retirement Fund Details section, click on the **Search** icon.
- A pop-up block will open where you can search for the Transferee Fund. The Funds displayed are all the **registered approved funds** listed on **COMPASS**. Click on the **tick box** to select the Fund.
- Click on the **SELECT FUND** button.

When the Fund is selected, the Fund's banking details will be populated. The member can add contact details of the Fund if available.

The screenshot displays the 'Transfer Details' page, which is part of a 6-step process (Personal details, Claim details, Transfer details, Banking details, Documents, Confirm). The current step is 'Transfer details', titled 'Tell us about the retirement fund you're transferring to'.

Withdraw some of your money and transfer the rest

Total benefit value: R 327 261.67
Cash withdrawal limit: R 327 261.67

Cash value: R 100 000.00
Transfer value: R 227 261.67

Retirement fund details

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

Insurer & retirement fund name: DISCOVERY STAFF PROVIDENT FUND
Percentage of money to be transferred to the fund: 100 %
Contact name (optional): Jane Smith
Contact number (optional): 0812345678
Fund bank name: FNB
Fund bank account: 6225749363

Buttons: ADD FUND, PREVIOUS

Search Fund [APR]

Enter at least 3 characters and press Enter to search

FUND NAME
<input type="checkbox"/> DISCOVERY PRESERVATION PROVIDENT FUND: FNB 62326390
<input type="checkbox"/> DISCOVERY PRESERVATION PROVIDENT FUND: FNB 62326390
<input type="checkbox"/> DISCOVERY PRESERVATION PROVIDENT FUND: FNB 62326390
<input checked="" type="checkbox"/> DISCOVERY STAFF PROVIDENT FUND: FNB 62257493
<input type="checkbox"/> DISCOVERY STAFF PROVIDENT FUND: FNB 62326390
<input type="checkbox"/> DISCOVERY STAFF PENSION FUND: FNB 62326390

Buttons: CANCEL, SELECT FUND

- All the details must be checked. Another Fund can be added by clicking the **ADD ANOTHER FUND +** button, should the member wish to split the transfer portion between multiple funds.
- When everything is completed, click on the **CONTINUE** button. This will take you to the **Banking Details** page.

Step 2 of 8
Tell us about the retirement fund you're transferring to

Withdraw some of your money and transfer the rest

R 327 261.67 R 327 261.67
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 = 227 261.67

Retirement fund details

Fund details	Value	Percentage split
DISCOVERY STAFF PROVIDENT FUND	R 227 261.67	100 %
TOTAL:	R 227 261.67	100 % / R 227 261.67

ADD ANOTHER FUND +

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.

STEP 9 – Banking details

When you select **Cash** as one or part of the **benefit payment options**, you will be required to insert your banking details and may be required to upload a copy of your **stamped** bank statement, **less than 3 months old**, reflecting **your name and ID number**.

- In the Bank name field **type a part of the bank name** and **select the bank** from the dropdown list. The **branch code** and **Branch name** will populate automatically based on the bank selected.
- Insert the **Account number**.
- Select the **Account type** i.e. Current, Savings or Transmission Account
- Click on the **CONTINUE** button.

Step 4 of 6
Let's talk financials

Banking details

Bank name
PostBank - South African Post Office Bank

Branch code
460005

Branch name
SA POSTBANK SOC LTD

Account number
1234567890

Account type
 Current Account Savings Account Transmission Account

Previous

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.

Claims against your benefit

Claims against a benefit must be indicated on MYCLAIM and supporting documentation must be uploaded. These claims are regarded as liens.

A lien is an amount owed to a 3rd party, deductible from the member account balance.

An employer must add an employer lien when they confirm the member's exit details on MYCLAIM. The available liens that the employer can submit are:

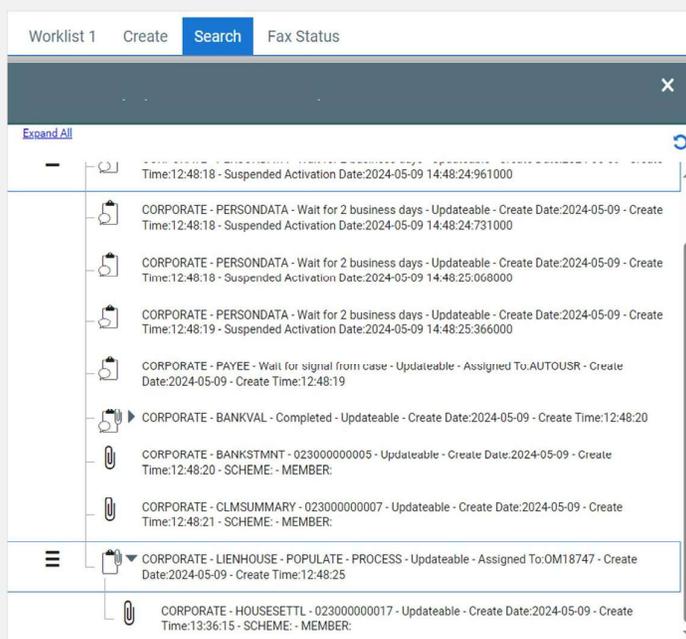
- **Employer Compensation lien**
- **Employer Housing lien**

A member must add the following liens, if applicable, when they submit their claim.

- **Divorce Court Order**
- **Maintenance Court Order**

A lien can be added to any of the benefit payment options.

When the claim is **ACCEPTED & SUBMITTED** on MYCLAIM, it will create a **lien transaction in CHORUS**.



PLEASE NOTE:

- A lien transaction will require the claims administrator to perform additional steps in processing the claim.
- The Claims administrator must first update the lien amounts in COMPASS before updating and completing the lien transaction in CHORUS.

STEP 10 – Documents

- When you select **Transfer** as one or part of the **benefit payment options**, or if you selected a **claim against your benefit**, you will be required to upload additional documentation.
- When you have uploaded the document, A block will appear to confirm that you want to attach the selected document. Click on the **YES** button.
- When you have uploaded and checked all the documents, click on the **CONTINUE** button.

Progress bar: Personal details (checked), Claim details (checked), Transfer details (checked), Banking details (checked), Documents (current), Confirm (pending).

Step 9 of 6: Before you go, we need a couple of documents

Please provide us with the following documents

- Proposal/Application Form of Receiving Insurer

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

Proposal/Application Form of Receiving Insurer

Discovery Staff Provident Fund.pdf (10x10 MB)

Confirmation ?

Are you sure you wish to upload this file: Discovery Staff Provident Fund.pdf?

CANCEL YES

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.
0800 20 30 40.

STEP 11 – Confirm

- The last section will display all the information inserted in the previous sections. The information must be checked and if anything must be amended, click on the **PREVIOUS** button until you get to the required section.
- Read through the **terms & conditions** and tick the check box.
- When you have checked all the information, click on the **ACCEPT AND SUBMIT CLAIM** button.

Step 5 of 5

Confirm your form details

Personal Details

Mr Joe Soap
Title & full name

9708215012089
ID Number

012345678
Tax Number

Contact Details

0811234567
Cellphone number

Jsoap@gmail.com
Email Address

Residential address

15, Maple Avenue,
Cape Town
8000

Postal address

Claim Details

Exit Details

Resignation
Exit reason

30/09/2023
Exit date

Benefit payment options

Take all of your money (Not recommended)
Payment option

Banking Details

PostBank - South African Post Office Bank
Bank name

SA POSTBANK SOC LTD
Branch name

PostBank - South African Post Office Bank
Branch Code

123456789
Account number

Current Account
Account type

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

I accept the [terms & conditions](#)

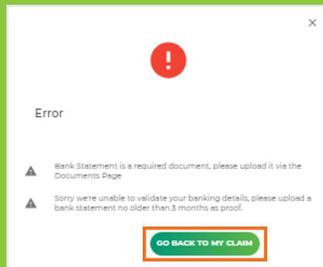
PREVIOUS **ACCEPT & SUBMIT CLAIM**

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.

PLEASE NOTE:

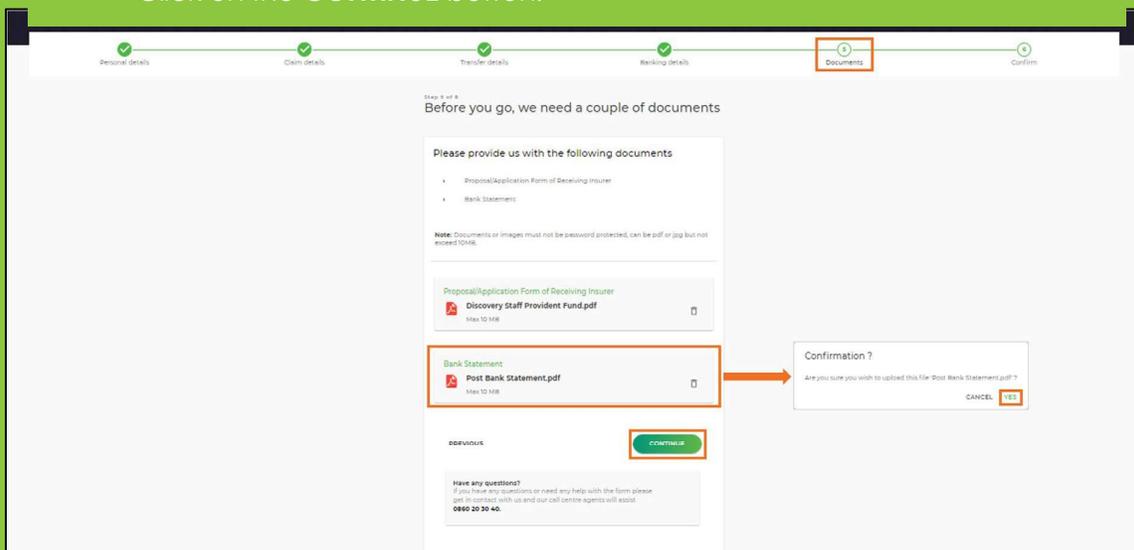
Automatic account verification (AVSR) only occurs when you **ACCEPT & SUBMIT** a claim on the **Confirm** page, and is done for the following banks:

- Standard Bank
- Nedbank
- ABSA
- First National Bank (FNB)

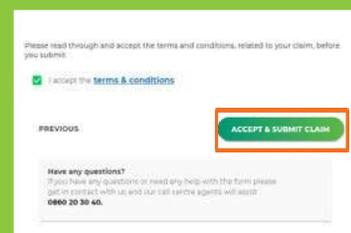


- When your **bank account details** could not be verified or a manual verification is required, the following Error message will be displayed.
- Click on the **GO BACK TO MYCLAIM** button.

- Click on **Documents** on the stepper at the top of the screen.
- On the **Documents** page, the member must **upload a bank statement**.
- A block will appear to confirm that you want to attach the selected document. Click on the **YES** button.
- Click on the **CONTINUE** button.



- On the Confirm page, click the **ACCEPT & SUBMIT CLAIM** button again.



STEP 12 – Done

- When your claim has been **accepted and submitted**, the following information will be displayed outlining the expected steps that will follow.
- Click on the **DOWNLOAD SUMMARY** link to download a copy of your claim information.
- Click on the **DONE** button to complete the process.



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 **x working days** to process and authorise your claim.

You're reference for this claim is your **member number: 10253820** 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 →](#)



MYCLAIM – SUPPORT

Once all claim information is verified and submitted, the automated claims process is triggered. The member will be kept informed on the progress of the claim via SMS communication.

PLEASE NOTE THE CONTACT DETAILS FOR ADDITIONAL SUPPORT:

Secure Services registration or login:

- Email: 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
 - Call: **0860 38 88 73**

Contact your Old Mutual Financial Adviser or your Broker.
oldmutual.co.za

