

MCIS LIFE EB Portal

**User Guide
HR**

Version 2.0.3c

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Common Functions

First Time Login

1. Preferred browser is Google Chrome. Go to <https://ebportal.mcis.my> to login with the User ID and Password provided by MCIS. Please contact MCIS support team at groubeportal@mcis.my for assistance to retrieve your user account information.
2. Enter User ID & Password.
3. Click Login to proceed.
4. User is required to change password for first time login.

RESET PASSWORD

Current Password

New Password

Confirm New Password

Cancel Reset

5. Enter Current Password, New Password and Confirm New Password to change password.
6. Acknowledgement Page will be loaded prior to further usage of MCIS Life EB Portal. Click I Accept to proceed.

Forgot Password

1. At login page, click Forgot Password
2. Enter User ID and Registered Email Address to start password reset process.

PASSWORD RESET

Please enter your registered User ID & email address to proceed.

User ID

e.g. John@mail.com

Cancel Next

PASSWORD RESET

Please enter your registered User ID & email address to proceed.

User ID

Password retrieval email has been set to the email address s*****@gmail.com. Check the email to reset password within 24 hours.

OK

3. Email will be sent to the email address entered. Retrieve the email and click “Reset Password Now” to continue.

From: noreply
Sent: Tuesday, 15 February, 2022 5:12 PM
To: Edmund Cheong Mun How <edmund.cheong@mcis.my>
Subject: MCIS - Forgot Password

Hi Edmund,

You have requested to Reset the Password. To complete this process please click the link below.

[Reset Password Now](#)

Thank You,
MCIS

4. Password reset page will be launched from the link clicked in email.

PASSWORD RESET

	User ID
New Password	
Confirm New Password	
Cancel	Next

5. Key in User ID, New Password and Confirm New Password to reset the forgotten password.

Dashboard

The function of this page is to provide a policy summary for all policies accessible to the HR. HR users can select a different policy to view the policy summary and access relevant details for each policy.

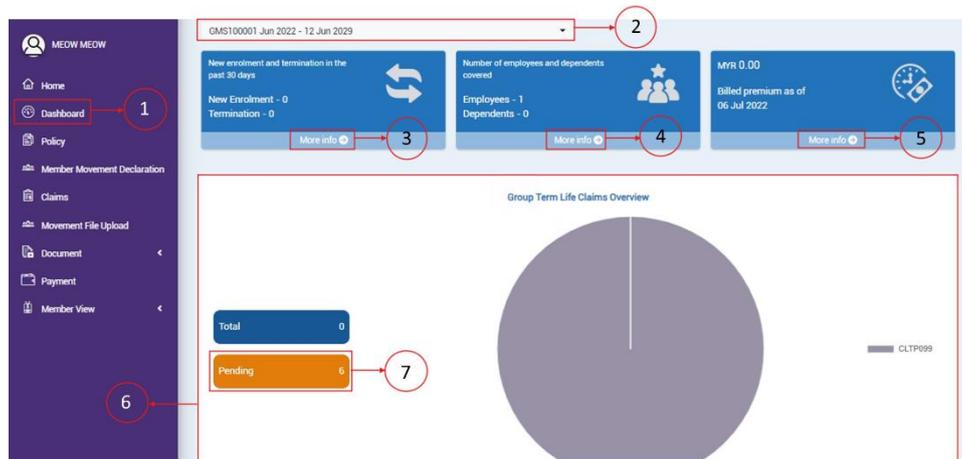


Figure 1: Dashboard Interface.

1. Navigate to the “Dashboard” section in the menu panel.
2. Select the policy number from the drop-down list.
3. New enrolment and termination in the past 30 days:
 - Add employee only: considered as 1 enrolment.
 - Add employee and dependent: considered as 1 enrolment.
 - Add new dependent only: considered as 1 enrolment.
 - Terminate employee: considered as 1 termination.
 - Employee death: considered as 1 termination.
 - Dependent termination: considered as 1 termination.
 - Dependent death: considered as 1 termination.

Click **Member Movement Declaration** to view the movement history for new enrolments and terminations in the past 30 days.

4. Number of employees and dependants covered:
 - The system will only display where the member status is “In-Force” only, grouped by unique member.

Click **View Policy Member** to view the number of employees and dependents covered under the policy.

5. Billed premium as of <<billed premium as at date>>:

Click [View Policy Company](#) to view the billed premium and other related details for the policy.

6. Card claims overview.

This section provides an overview of card claims based on the protection/product type purchased. It includes details for 3 product types:

i. Group Hospital & Surgical.

- Total reimbursement claims: Displays the count of claim records for the policy no. for ALL claim statuses.
- Total Outstanding claims: Displays the count of claim records for the policy no. for claims with claim status “Notified” or “Pending” only.

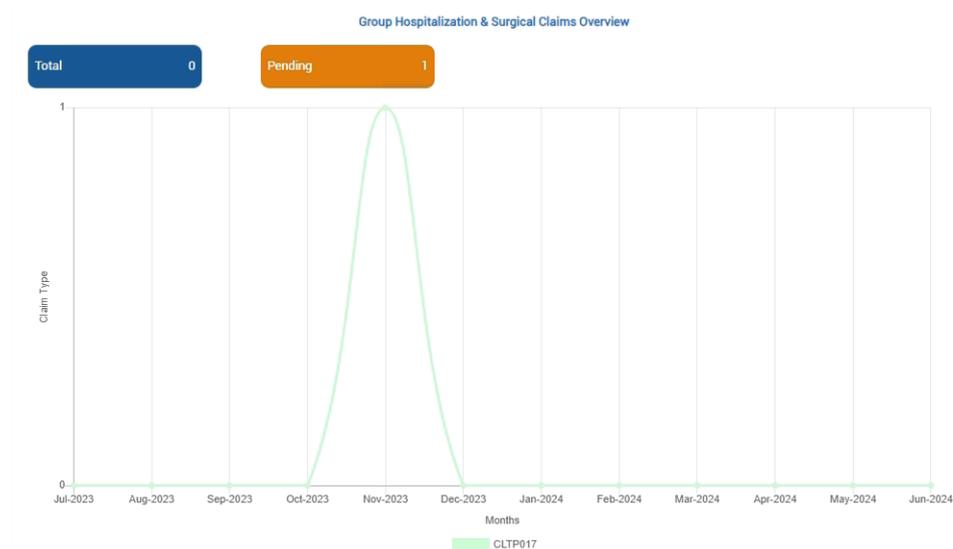


Figure 2: Sample graph chart for Group Hospitalization & Surgical claim with 1 pending outstanding claim.

ii. Group Term Life.

- Claim count distribution by claim type pie chart: Includes all claim statuses.

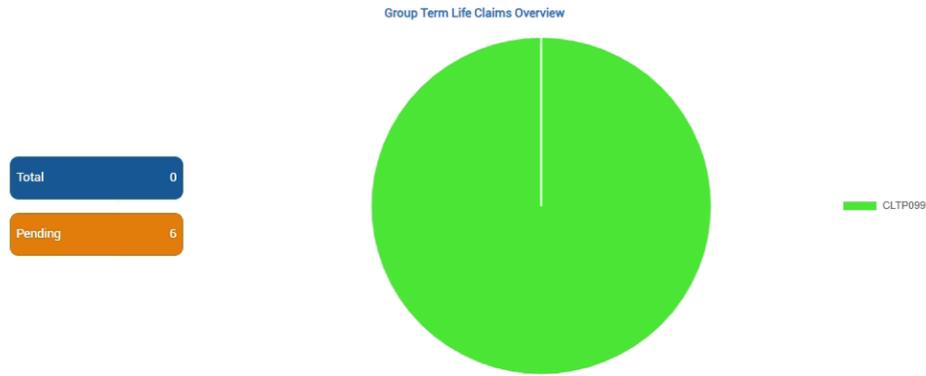


Figure 3: Sample pie chart for Group Term Life with 6 pending outstanding claims.

iii. Group Outpatient Plan.

- Total reimbursement claims: Displays the count of records for the policy no for ALL claim statuses.
- Total outstanding claims: Displays the count of claim records for the policy no. for claims with claim status "Notified" and "Pending" only.

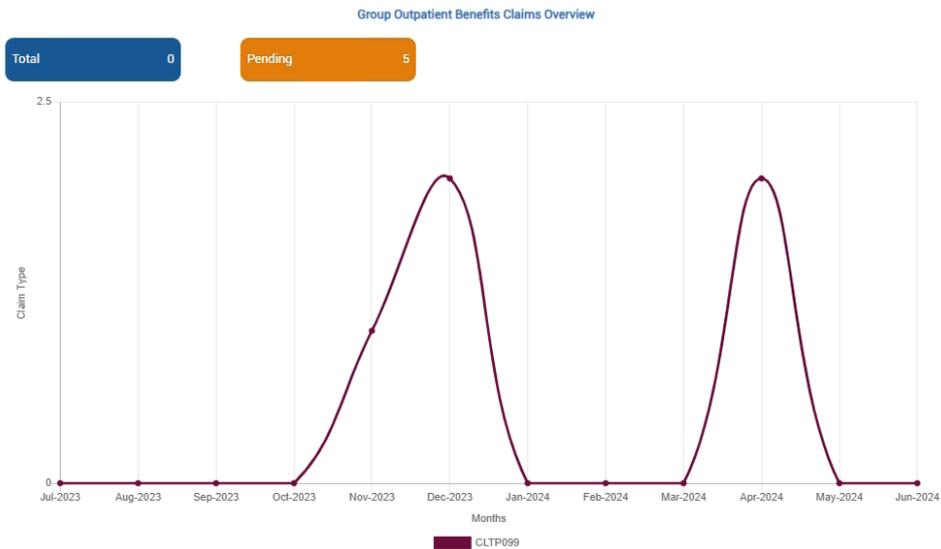


Figure 4: Sample Group Outpatient Plan with 5 pending claims.

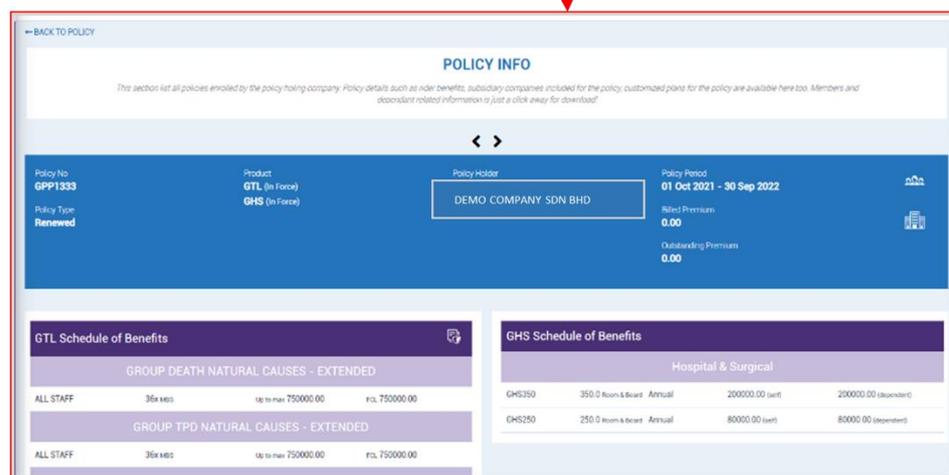
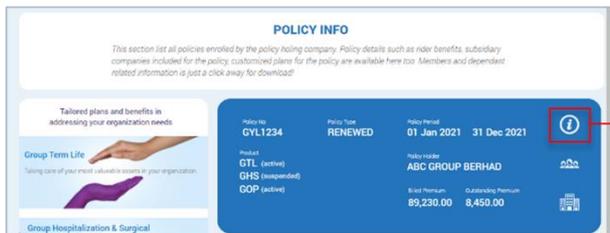
7. "Pending".

Click [Figure 7](#): Sample claim records for policy ABC1234, GOP Claims product Type. to view the pending claim in detail based on the selected policy number in steps 2.

View Policy Info

1. Navigate to and click at the “Policy” in menu panel, Policy Info screen will be displayed.

2. Click at the Info icon  to expand the details page.



3. Depending on the product (GTL, GHS, or GOP) purchased by respective company, the schedule of benefits will be displayed on screen.
4. Information such as categories, plans, benefits and limit shown on screen are as per respective policies purchased by the customer (company).
5. Click at the Next or Previous icon to view previous period policy information (of the same policy number only). Up to 1 previous period will be shown. Only applicable current period policy status is in-force.

View Policy Member

1. At Policy Info page, click at Member  icon to view list of employees in the policy.



2. Filter. Click at the expand (+) icon to proceed. User may filter records to display in table by available parameters. Different parameters can be specified.

3. At the top right of the data table, 4 options are available:

a. Search 

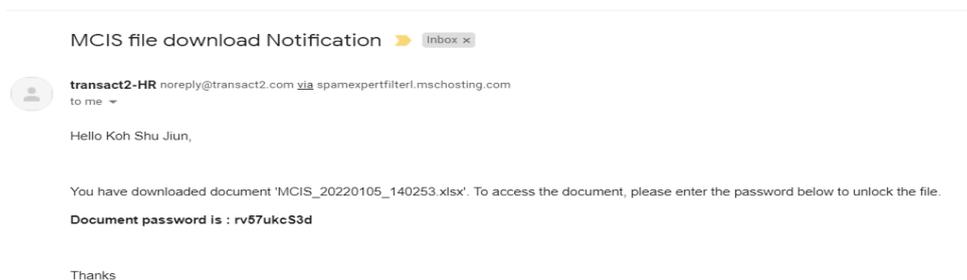
Key word search in data available in the table.

b. Config 

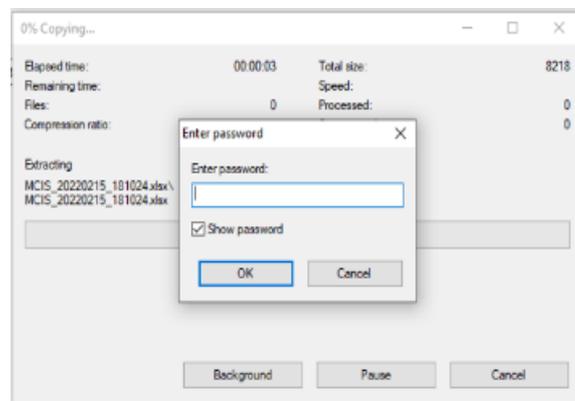
Hide / Un-hide columns according to your need. Click at the icon to select / un-select the columns to show in the data table.

c. Export to Excel 

Click to export data selected in table to Excel. The Excel file is password protected. Once clicked, an email will be sent to your email registered in EB Portal for the password to open the file. Unlock the file with the password received.



Sample Screen 1: Excel file sent to registered email.



Sample Screen 2: Unlock the file using password in "Sample Screen 1".

d. Export to PDF 

Click to print data into PDF format. The file is password protected. Once clicked at the icon, an email will be sent to your email registered in EB Portal for the password to open the file. Unlock the file with the password received.

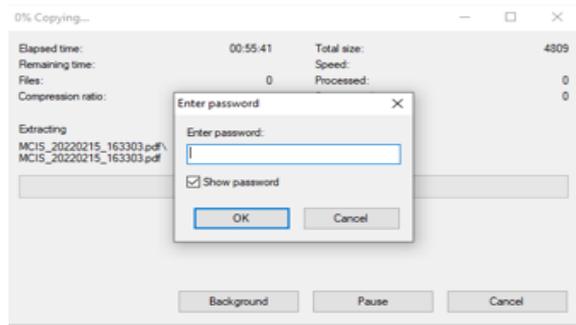
Subject: MCIS file download Notification

Hello Edmund,

You have downloaded document 'MCIS_20220215_163303.pdf'. To access the document, please enter the password below to unlock the file.

Document password is : 5d1J2n5sS3

Sample Screen 3: PDF file sent to registered email.



Sample Screen 4: Unlock the file using password in "Sample Screen 3".

4. At the data table, header row is sortable. User may sort column according to need.
5. Click [Download Employee & Dependent List](#) to download list of employees and dependents into Excel.
6. Click [Download Detail List by Benefit](#) to download list of employees with benefits into Excel.
7. Click at the respective employee record, it will expand and navigate into Employee Details page.

← BACK TO POLICY - MEMBER

POLICY INFO	EMPLOYEE INFO		
Policy No GHH9898	Name 9898 Member 3	GHS Plan -	
Policy Period from 01 Mar 2021 until 28 Feb 2022	Company TRANSACT2 SDN BHD	GTL Category OTHERS	
Policy Holder TRANSACT2 SDN BHD	IC / Passport No. 870909101111	Coverage Effective Date 01 Mar 2021	GOP Plan -

DEPENDENT						
Dependent Name	Relationship	Coverage Effective Date	IC/Passport No	Date of Birth	Gender	
9898 Dependent 1	Spouse	01 Mar 2021	890103051234	03 Jan 1989	F	

GTL BENEFITS - OTHERS			
GROUP PPD NATURAL CAUSES	0.00 (P&A)	60,000.00 (M&A)	50,000.00 (P&L)
GROUP TPD ALL CAUSES	0.00 (P&A)	70,000.00 (M&A)	70,000.00 (P&L)

View Policy Company

1. At Policy Info page, click at Company  icon to view list of companies in the policy.

← BACK TO POLICY

COMPANIES IN POLICY NO GYL1234
01 Jan 2021 - 31 Dec 2021

Company Name	Billed Premium	Outstanding Premium	Employee	Dependent	Total Member
ABC GROUP BERHAD	56,000.00	5,450.00	520	230	750
ABC SDN BHD	18,230.00	1,000.00	197	75	170
XYZ SDN BHD	4,344.00	500.00	25	9	34
YY SDN BHD	5,299.00	500.00	33	10	43
DEMO SDN BHD	5,357.00	1,000.00	45	8	53
TOTAL	89,230.00	8,450.00	820	332	1152

Billed Premium as of 1 May 2021
Outstanding Premium as of 1 May 2021

- Table shows unique employee and dependent count for the policy selected.

View Underwriting Records

- At Policy Info Page, click at Underwriting  icon at GTL Schedule of Benefit card. Underwriting list for the policy selected will be displayed.

← BACK TO POLICY

ABC GROUP BERHAD

FILTER +

UNDERWRITING LIST FOR GYL1234
Jan 2021 - 31 Dec 2021

[View UW List By GTL Benefit](#)

Policy No.	Coverage Effective Date	Name	IC No / Passport No.	Age	Company	UW Completion Status	GTL Category
GYL1234	1 Jan 2021	Lee San San	800909101234	42	ABC Group Berhad	Pending	Management
GYL1234	1 Jan 2021	Mohd Nor Hisham	740908114567	45	XYZ Sdn Bhd	Completed	Management
GYL1234	1 Jan 2021	Muthu Rahman	690423071231	56	ABC Sdn Bhd	Pending	Directors

- Filter. Click at the expand (+) icon to proceed. User may filter records to display in table by available parameters. Different parameters can be specified.
- At the top right of the data table, 4 options are available:
 - Search 
Key word search in data available in the table.
 - Config 
Hide / Un-hide columns according to your need. Click at the icon to select / un-select the columns to show in the data table.
 - Export to Excel 
Click to export data selected in table to Excel. The Excel file is password protected. Once clicked, an email will be sent to your email registered in EB Portal for the password to open the file. Unlock the file with the password received.

MCIS file download Notification Inbox x

 **transact2-HR** noreply@transact2.com via spamexpertfilterl.mschosting.com
to me ▾

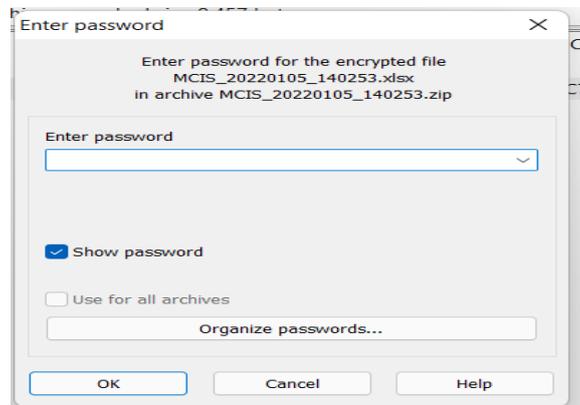
Hello Koh Shu Jiun,

You have downloaded document 'MCIS_20220105_140253.xlsx'. To access the document, please enter the password below to unlock the file.

Document password is : rv57ukeS3d

Thanks

Sample Screen 5: Excel file sent to registered email.



Sample Screen 6: Unlock the file using password in "Sample Screen 5".

d. Export to PDF 

Click to print data into PDF format. The file is password protected. Once clicked at the icon, an email will be sent to your email registered in EB Portal for the password to open the file. Unlock the file with the password received.

 **transact2-HR** noreply@transact2.com via spamexpertfilterl.mschosting.com
to me ▾

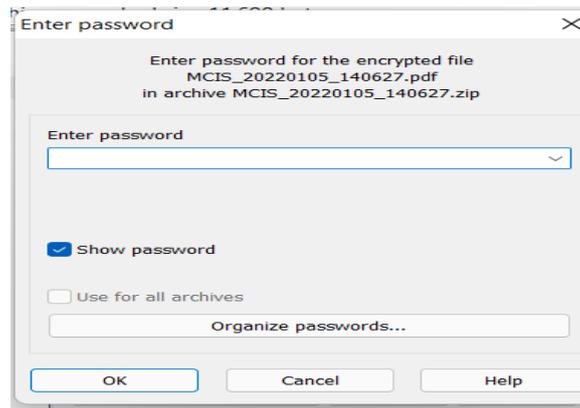
Hello Koh Shu Jiun,

You have downloaded document 'MCIS_20220105_140627.pdf'. To access the document, please enter the password below to unlock the file.

Document password is : EwJ2Fv1RPC

Thanks

Sample Screen 7: PDF file sent to registered email.



Sample Screen 8: Unlock the file using password in "Sample Screen 7".

- At the data table, header row is sortable. User may sort column according to need.
- Click at [View UW List By GTL Benefit](#) to view list of underwriting record by respective benefit.

UNDERWRITING LIST BY GTL BENEFITS FOR GYL1234
01 Jan 2021 - 31 Dec 2021

Policy No.	Coverage Effective Date	Name	IC / Passport No.	Benefit	UW Status	GTL Category	Proposed SA	Accepted SA
GYL1234	01-Jan-2021	Lee San San	800909101234	GTL Base Plan	Pending	Management	500,000.00	
GYL1234	01-Jan-2021	Mohd Nor Hisham	740908114567	TPD All Causes	Accepted	Management	600,000.00	500,000.00
GYL1234	01-Jan-2021	Muthu Rahman	690423071231	CI Accelerated	Rejected	Directors	500,000.00	

- Similarly, search, filter column, export to excel and export to PDF functions are available as standard.

Upload Underwriting Requirement Document

- From Underwriting List page, click at respective employee record to navigate into employee's underwriting details page.

UNDERWRITING LIST FOR GYL1234
Jan 2021 - 31 Dec 2021

[View UW List By GTL Benefit](#)

Policy No.	Coverage Effective Date	Name	IC No / Passport No.	Age	Company	UW Completion Status	GTL Category
GYL1234	1 Jan 2021	Lee San San	800909101234	42	ABC Group Berhad	Pending	Management
GYL1234	1 Jan 2021	Mohd Nor Hisham	740908114567	45	XVZ Sdn Bhd	Completed	Management
GYL1234	1 Jan 2021	Muthu Rahman	690423071231	35	ABC Sdn Bhd	Pending	Directors

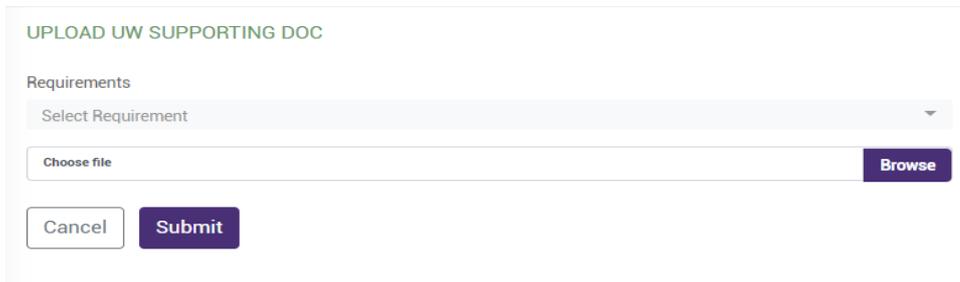
← BACK TO POLICY - UW MEMBER

POLICY INFO Policy No. GHH9898 Policy Period from 01 Mar 2021 until 28 Feb 2022 Policy Holder TRANSACT2 SDN BHD		EMPLOYEE INFO Name 9898 Member 3 Company TRANSACT2 SDN BHD IC / Passport No. 870909101111		Coverage Effective Date 01 Mar 2021 GTL Category OTHERS UW Completion Status Pending	
---------------------------------------------------------------------------------------------------------------------------------------------------------------	--	-----------------------------------------------------------------------------------------------------------------------------------------	--	--------------------------------------------------------------------------------------------------------------------------	--

UNDERWRITING REQUIREMENTS

No.	Requirement	Description	File	Submission Date	Status
1	Proposal Form	Please update proposal form here.	File	27 Jan 2022	Submitted
2	Others	Please submit (i) Blood Test (ii) Health Declaration Form			Pending

2. Click at Upload  icon to upload UW requirement document required my MCIS Life. An upload Underwriting Requirement Document section will be launched.

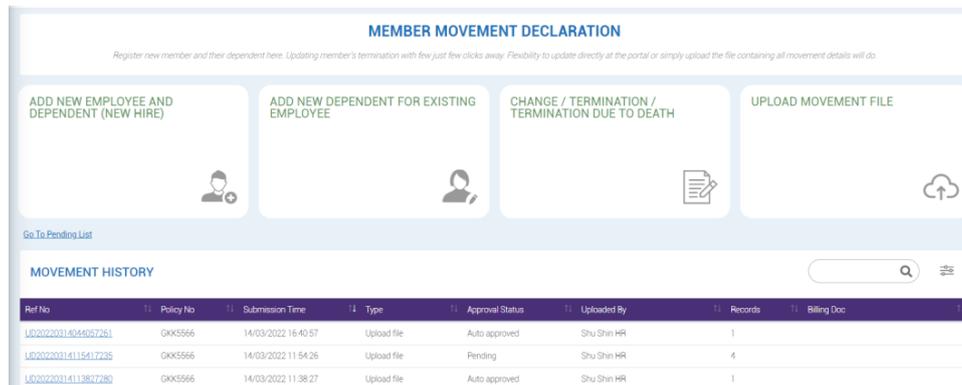


Select the applicable Requirement and upload supporting document to submit to MCIS Life.

Member Movement Declaration

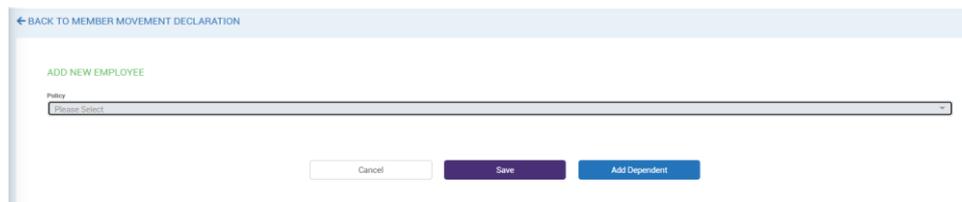
Add New Employee and Dependent (New Hire)

1. Navigate to and click at “Member Movement Declaration” in menu panel.



Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
LD2022031624657261	GKK5566	14/03/2022 16:40:57	Upload file	Auto approved	Shu Shin HR	1	
LD20220314115417235	GKK5566	14/03/2022 11:54:26	Upload file	Pending	Shu Shin HR	4	
LD20220314113827280	GKK5566	14/03/2022 11:38:27	Upload file	Auto approved	Shu Shin HR	1	

2. Select the first option – Add New Employee and Dependent (New Hire) to enrol new employees and their dependent.



3. Select policy number from drop down list, once selected, screen as below will be prompted.

← BACK TO MEMBER MOVEMENT DECLARATION

ADD NEW EMPLOYEE

Policy: GK5556

Employee Name: ID Type: IC No / Passport No:

Marital Status: Nationality: Date Of Birth: Gender:

Effective Date: Company: Employees ID:

Occupation: Cost Centre: Division Branch:

Department: Remarks: Email:

Bank: Bank (if not available in list): Bank (if not available in list): Account No: Bank Account No:

GTL: GHS (if applicable): Outpatient (if applicable):

Employee Category: GMS Plan: Outpatient Plan:

Monthly Salary:

4. Fill up the compulsory columns as below:

Column	Description
Employee Name	Employee full name
ID Type	Select the applicable ID Type, i.e., NRIC, Passport, Old IC
IC No / Passport No	Fill in the ID No as per the ID Type selected in previous column. NRIC must be 12 digits without “-“
Marital Status	Select applicable marital status.
Nationality	Select applicable Nationality. If NRIC is chosen in ID Type, Nationality will be defaulted to Malaysian.
Date of Birth	Fill in the date of birth
Gender	Select applicable gender
Effective Date	IMPORTANT. Fill in the effective date where the employee will be effectively covered under the policy.
Company	Select the company the employee are in.

5. Fill up the columns where applicable.

Column	Description
Employee ID	Fill in the Staff No / Staff ID, if applicable
Occupation	Fill in the Job Position / Designation, if applicable
Cost Center	Fill in the Cost Center, if applicable
Division Branch	Fill in the Division / Branch, if applicable
Department	Fill in the Department, if applicable
Remarks	Fill in Remarks, if any
Email	Fill in Email (Compulsory if GHS Plan is selected)
Bank	Select the bank if applicable
Bank (if not available in list)	Fill in the bank name if bank used is not in bank list
Account No	Fill in the Account No, if applicable

6. Select the applicable GTL Category, GHS Plan or Outpatient Plan for the new employee.

7. Click SAVE if no further dependent records to be saved.

- Click ADD DEPENDENT to add dependent(s) for the new employee.

Dependent

Dependent Name

Date of Birth IDType IC No / Passport No

Relationship Gender Dependent Marital Status

Nationality

Column	Description
Dependent Name	Fill in dependent full name
Date of Birth	Fill in the date of birth
ID Type	Select the applicable ID Type, i.e., NRIC, Passport, Old IC
IC No / Passport No	Fill in the ID No as per the ID Type selected in previous column. NRIC must be 12 digits without “-“
Relationship	Select applicable relationship.
Gender	Select applicable gender
Date of Birth	Fill in the date of birth
Dependent Marital Status	Select applicable marital status
Nationality	Select applicable Nationality. If NRIC is chosen in ID Type, Nationality will be defaulted to Malaysian.

- Click ADD to save record.
- Click ADD DEPENDENT to create more dependent records or click SAVE to save both employee and dependent records.
- Once saved, Records to Submit screen will be shown, user may choose to add more movement declaration, Submit Batch or Delete Batch from here.

← BACK TO MEMBER MOVEMENT DECLARATION

RECORDS TO SUBMIT

Movement Type	Policy No	Employee Name	Employee ID Type	Employee IC No / Passport No	Effective Date	Dependent Name	Dependent ID Type	Dependent IC No / Passport No	Relationship
Add	GKK3556	5555 Member 3	NRIC	870909101911	28 Feb 2022	5555 Son 2 Member 3	NRIC	202224052578	Son
Change	GKK3556	5555 Member 3	NRIC	870909101911	14 Jan 2022	5555 Wife Member 3	NRIC	900101101238	Spouse
Change	GKK3556	5555 Member 3	NRIC	870909101911	14 Jan 2022	5555 Son Member 3	NRIC	100908103451	Son
Change	GKK3556	5555 Member 3	NRIC	870909101911	14 Jan 2022	5555 Daughter Member 3	NRIC	12040102234	Daughter
Change	GKK3556	5555 Member 3	NRIC	870909101911	14 Jan 2022				SELF

First Previous 1 Next Last

- Click SUBMIT BATCH to submit the list to MCIS.
- Once submitted, records will be displayed at Movement History section in Member Movement Declaration page.

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
UD2022031503304570	GKK5566	15/03/2022 15:30:04	Upload file	Auto approved	Shu Shin HR	4	
UD20220315032410693	GKK5566	15/03/2022 15:24:10	Upload file	Auto approved	Shu Shin HR	3	
UD20220315034714905	GKK5566	15/03/2022 09:47:14	Upload file	Auto approved	Shu Shin HR	2	

14. Click at the Ref No (in blue) to view details.

Movement Type	Employee Name	Employee ID Type	Employee IC No / Passport No	Dependent Name	Dependent ID Type	Dependent IC No / Passport No	Date Of Birth	Gender	Nationality	Relationship
Add	Member 10	NRIC	750615059851				15-Aug-1975	F	Malaysian	SELF
Add	Member 11	NRIC	99072145254				22-Jul-1999	F	Malaysian	SELF
Add	Member 11	NRIC	99072145254	5566-Dependent 1 - SO - Member 11	NRIC	220309038714	22-Jul-1999	F	Malaysian	Son
Add	Member 12	NRIC	950607058541				06-Jul-1995	M	Malaysian	SELF

Add New Dependent for Existing Employee

1. Navigate to and click at “Member Movement Declaration” in menu panel.

MEMBER MOVEMENT DECLARATION

Register new member and their dependent here. Updating member's termination with few just few clicks away. Flexibility to update directly at the portal or simply upload the file containing all movement details will do.

ADD NEW EMPLOYEE AND DEPENDENT (NEW HIRE)



ADD NEW DEPENDENT FOR EXISTING EMPLOYEE



CHANGE / TERMINATION / TERMINATION DUE TO DEATH



UPLOAD MOVEMENT FILE



[Go To Pending List](#)

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
UD20220314044057261	GKK5566	14/03/2022 16:40:57	Upload file	Auto approved	Shu Shin HR	1	
UD20220314115417235	GKK5566	14/03/2022 11:54:26	Upload file	Pending	Shu Shin HR	4	
UD2022031411387280	GKK5566	14/03/2022 11:38:27	Upload file	Auto approved	Shu Shin HR	1	

2. Select the second option – Add New Dependent for Existing Employee.

[← BACK TO MEMBER MOVEMENT DECLARATION](#)

ADD NEW DEPENDENT FOR EXISTING EMPLOYEE

Select a policy ▼

Employee IC / Employee No ▼

Cancel
Add Dependent

3. Select the policy no and employee to proceed. To proceed, click ADD DEPENDENT.

← BACK TO MEMBER MOVEMENT DECLARATION

ADD NEW DEPENDENT FOR EXISTING EMPLOYEE

GKK5566

5566 Member 3 - 870909101911

Cancel Add Dependent

GTL GHS GOP

EXISTING DEPENDENT

Name	Relationship	ID Type	ID No	Date of Birth	Gender	Nationality	Marital Status
5566 Wife Member 3	Spouse	NRIC	900101101238	01 Jan 1990	F		
5566 Son Member 3	Son	NRIC	10908103451	08 Sep 2010	M		
5566 Daughter Member 3	Daughter	NRIC	120404102234	04 Apr 2012	F		

First Previous 1 Next Last

- Existing dependents list will be shown once employee is selected. To add new dependent, click ADD DEPENDENT.
- Fill in the details for the new dependent to be enrolled.

Dependent

Dependent Name

Dependent Name

Date of Birth Date of Birth

ID Type Please Select

IC No / Passport No IC No / Passport No

Relationship Please Select

Gender Please Select

Dependent Marital Status Please Select

Nationality Please Select

Effective Date Effective Date

Cancel Add

Column	Description
Dependent Name	Fill in dependent full name
Date of Birth	Fill in the date of birth
ID Type	Select the applicable ID Type, i.e., NRIC, Passport, Old IC
IC No / Passport No	Fill in the ID No as per the ID Type selected in previous column. NRIC must be 12 digits without “-“
Relationship	Select applicable relationship.
Gender	Select applicable gender
Date of Birth	Fill in the date of birth
Dependent Marital Status	Select applicable marital status
Nationality	Select applicable Nationality. If NRIC is chosen in ID Type, Nationality will be defaulted to Malaysian.
Effective Date	Fill in the effective date for this new dependent.

- Click ADD once all data are entered.
- Once saved, Records to Submit screen will be shown, user may choose to add more movement declaration, Submit Batch or Delete Batch from here.

← BACK TO MEMBER MOVEMENT DECLARATION

RECORDS TO SUBMIT

Movement Type	Policy No	Employee Name	Employee ID Type	Employee IC No / Passport No	Effective Date	Dependent Name	Dependent ID Type	Dependent IC No / Passport No	Relationship
Add	GKK5566	5566 Member 3	NRIC	870909101911	28 Feb 2022	5566 Son 2 Member 3	NRIC	220224032578	Son
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Wife Member 3	NRIC	900101101238	Spouse
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Son Member 3	NRIC	109908103451	Son
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Daughter Member 3	NRIC	120404102234	Daughter
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022				SELF

First Previous 1 Next Last

Add New Movement Submit Batch Delete Batch

- Click SUBMIT BATCH to submit the list to MCIS.
- Once submitted, records will be displayed at Movement History section in Member Movement Declaration page.

MOVEMENT HISTORY

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
UD20220315033004570	GKK5566	15/03/2022 15:30:04	Upload file	Auto approved	Shu Shin HR	4	
UD20220315032410693	GKK5566	15/03/2022 15:24:10	Upload file	Auto approved	Shu Shin HR	3	
UD20220315094714906	GKK5566	15/03/2022 09:47:14	Upload file	Auto approved	Shu Shin HR	2	

- Click at the Ref No (in blue) to view details.

Change / Termination / Termination Due to Death

- Navigate to and click at "Member Movement Declaration" in menu panel.

MEMBER MOVEMENT DECLARATION

Register new member and their dependent here. Updating member's termination with few just few clicks away. Flexibility to update directly at the portal or simply upload the file containing all movement details will do.

ADD NEW EMPLOYEE AND DEPENDENT (NEW HIRE)

ADD NEW DEPENDENT FOR EXISTING EMPLOYEE

CHANGE / TERMINATION / TERMINATION DUE TO DEATH

UPLOAD MOVEMENT FILE

[Go To Pending List](#)

MOVEMENT HISTORY

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
UD20220314034027261	GKK5566	14/03/2022 16:40:57	Upload file	Auto approved	Shu Shin HR	1	
UD20220314115417235	GKK5566	14/03/2022 11:54:26	Upload file	Pending	Shu Shin HR	4	
UD20220314113827280	GKK5566	14/03/2022 11:38:27	Upload file	Auto approved	Shu Shin HR	1	

- Select Change / Termination / Termination Due to Death.

CHANGE / TERMINATION / TERMINATION DUE TO DEATH

Select a policy

Employee IC / Employee No

GO

- Select the policy and Employee, click GO to proceed.

← BACK

Policy No: **GKK5566** Name: **5566 Member 3** IC/Passport No: **870909101911**
 Policy Period: **from 14 Jan 2022 until 13 Jan 2023** Company: **NEW COMPANY SDN BHD**

MEMBER LIST

#	Name	Effective Date	Relationship	IC/Passport No	Date of Birth	Gender
<input type="checkbox"/>	5566 Member 3	14 Jan 2022	SELF	870909101911	10 Oct 1980	M
<input type="checkbox"/>	5566 Wife Member 3	14 Jan 2022	Spouse	900101101238	01 Jan 1990	F
<input type="checkbox"/>	5566 Son Member 3	14 Jan 2022	Son	100908103451	08 Sep 2010	M
<input type="checkbox"/>	5566 Daughter Member 3	14 Jan 2022	Daughter	120404102234	04 Apr 2012	F

First Previous **1** Next Last

UPDATE TERMINATE REPORT DEATH

- Click at the checkbox next to Name before selecting the option at the bottom, i.e., Update, Terminate, Report Death.
- To update, click UPADTE button. System will display the existing details of the selected name. Update the columns where applicable.

If Dependent Name Column is filled, data in this section is belonging to the dependent. If dependent Name is empty, these data belong to Employee

Nationality: **Malaysian**
 Effective Date: **14/01/2022** Date of Birth: **10/10/1980**
 Gender: **M** Marital Status: **Please Select**

Company: **NEW COMPANY SDN BHD** Occupation: Employee ID: Division / Branch: Remarks: Account No: Bank: **Please Select** Bank (Others): Monthly Salary: GTL Category: **COMMON** GHS Plan: **PLANG00** Outpatient: **Please Select**

- Click SAVE to proceed and records will be displayed at Records to Submit page.
- To terminate, click TERMINATE button.

TERMINATION FOR 5566 MEMBER 1 830721089900

Effective Date: **14/01/2022**

Name: **5566 Member 1** ID Type: **NRIC** IC No / Passport No: **830721089900**
 Nationality: Date of Birth: **21/07/1983** Gender: **F**
 Company: **NEW COMPANY SDN BHD**

Cancel Save

- Fill in the Effective Date, click SAVE to continue.
- Records will be displayed at Records to Submit page.
- To terminate an employee due to death, click REPORT DEATH button.

TERMINATION FOR 5566 MEMBER 1 830721089900

Effective Date
14/01/2022

Name: 5566 Member 1 ID Type: NRIC IC No / Passport No: 830721089900

Nationality: Date Of Birth: 21/07/1983 Gender: F

Company: NEW COMPANY SDN BHD

Cancel Save

- Fill in the Effective Date, click SAVE to continue.
- Records will be displayed at Records to Submit page.
- At Records to Submit page, user may choose to add more movement declaration, Submit Batch or Delete Batch from here.

← BACK TO MEMBER MOVEMENT DECLARATION

RECORDS TO SUBMIT

Movement Type	Policy No	Employee Name	Employee ID Type	Employee IC No / Passport No	Effective Date	Dependent Name	Dependent ID Type	Dependent IC No / Passport No	Relationship
Add	GKK5566	5566 Member 3	NRIC	870909101911	28 Feb 2022	5566 Son 2 Member 3	NRIC	230224052578	Son
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Wife Member 3	NRIC	900101101238	Spouse
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Son Member 3	NRIC	100908103451	Son
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022	5566 Daughter Member 3	NRIC	120404102234	Daughter
Change	GKK5566	5566 Member 3	NRIC	870909101911	14 Jan 2022				SELF

First Previous 1 Next Last

Add New Movement Submit Batch Delete Batch

- Click SUBMIT BATCH to submit the list to MCIS.
- Once submitted, records will be displayed at Movement History section in Member Movement Declaration page.

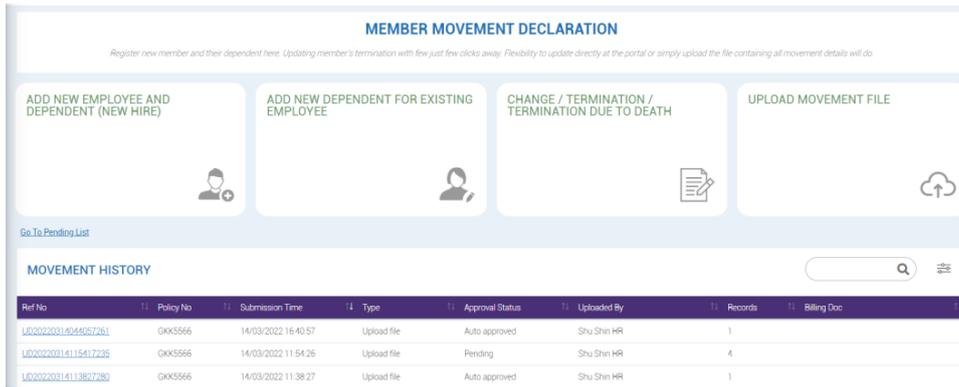
MOVEMENT HISTORY

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
LD20220315033004570	GKK5566	15/03/2022 15:30:04	Upload file	Auto approved	Shu Shin HR	4	
LD2022031503241699	GKK5566	15/03/2022 15:24:10	Upload file	Auto approved	Shu Shin HR	3	
LD20220315094714905	GKK5566	15/03/2022 09:47:14	Upload file	Auto approved	Shu Shin HR	2	
LD20220315094714905	GKK5566	15/03/2022 09:47:14	Upload file	Auto approved	Shu Shin HR	1	

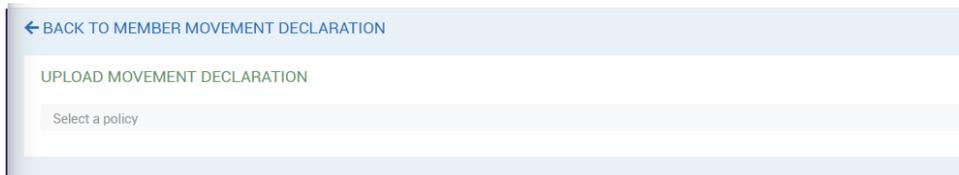
- Click at the Ref No (in blue) to view details.

Upload Movement File

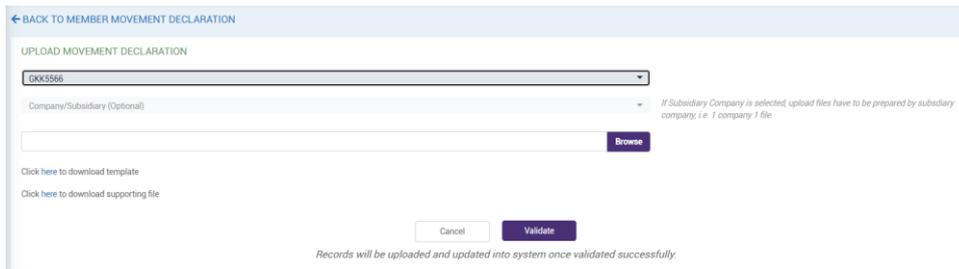
- Navigate to and click at “Member Movement Declaration” in menu panel.



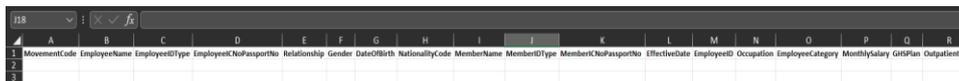
2. Select Upload Movement File to proceed.



3. Select a policy to proceed.



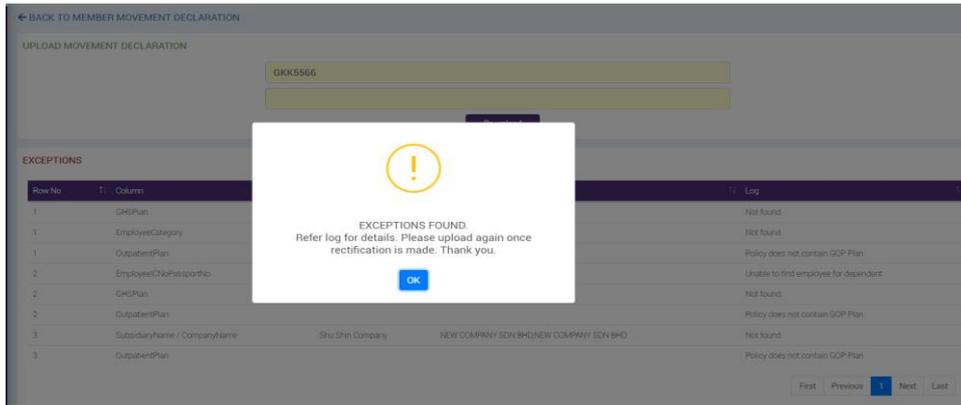
4. At [Click here to download template](#), click here in blue to download the upload file template. Upload file should be in MS Excel format.



5. At [Click here to download supporting file](#), click here in blue to download the supporting file which contains all the relevant codes applicable to the policy number selected.

	A	B	C	D	E	F	G	H	I	J	K
1	Movement Type	GTL Category	GHS Plan	Outpatient Plan	Company Name	Gender	Relationship	Bank Code	ID Type		
2	T	COMMON	PLAN300		NEW COMPANY SDN BHD	F	SP	CIMB ISLAMIC BANK	NRIC		
3	A	SPECIAL	PLAN200			M	DA	SUMITOMO MITSUI BANKING CORPORATION MALAYSIA BERHAD	PP		
4	C						SO	AGRO BANK/BANK PERTANIAN	Old IC		
5	D						SELF	MA/BANK ISLAMIC BANK			
6								HSBC BANK			
7								UNITED OVERSEAS BANK (M) BHD			

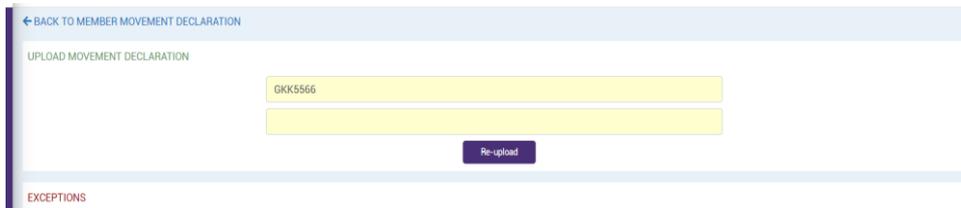
6. Upload filled template (with movement declaration data) by clicking BROWSE and click VALIDATE to proceed further.



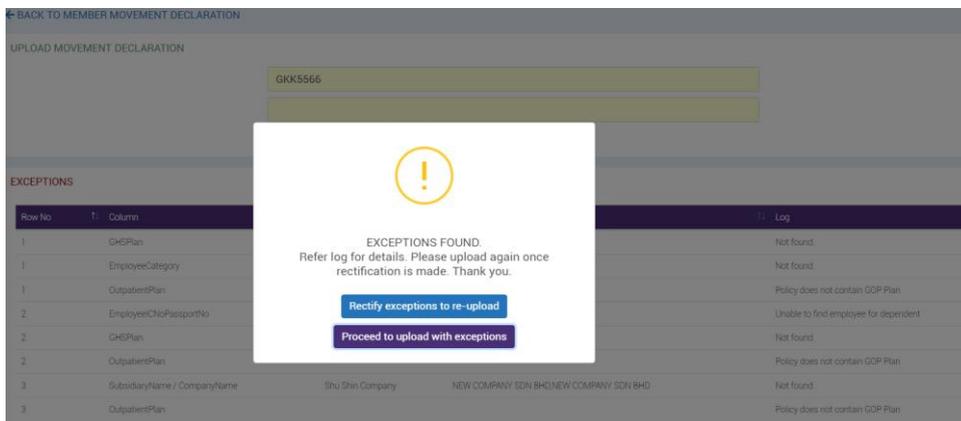
7. Message as shown above will be shown if file uploaded has invalid / incorrect data.
8. Click OK to upload again. User may refer to the Log on screen to further rectify the upload file.

Row No	Column	Value Input	Valid Value	Log
1	GHSPlan	PLAN500	PLAN300,PLAN200	Not found
1	EmployeeCategory	OTHERS	COMMON,SPECIAL	Not found
1	OutpatientPlan			Policy does not contain GOP Plan
2	EmployeeChNoPassportNo	771105081242		Unable to find employee for dependent
2	GHSPlan	PLAN500	PLAN300,PLAN200	Not found
2	OutpatientPlan			Policy does not contain GOP Plan
3	SubsidiaryName / CompanyName	Shu Shin Company	NEW COMPANY SDN BHD,NEW COMPANY SDN BHD	Not found
3	OutpatientPlan			Policy does not contain GOP Plan

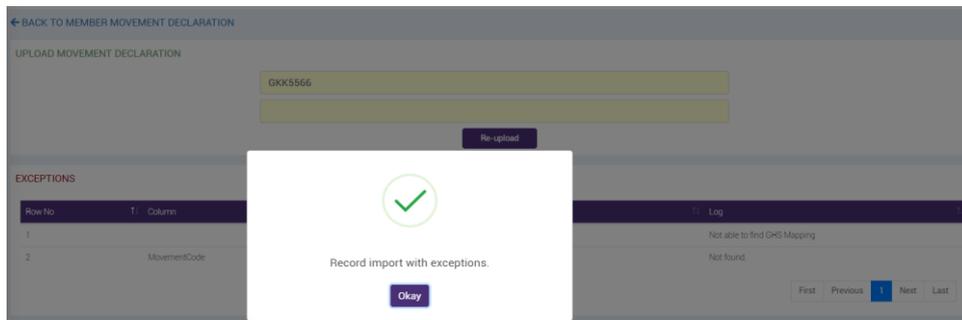
9. Click RE-UPLOAD once the file is rectified.



10. If the second upload attempt (1st Re-Upload) is still failed, the same error message will be displayed, and user is required to update the file again before can attempt to upload again.
11. At 2nd Re-Upload, if the file still contains invalid / incorrect data, below message will be displayed.



12. At this point, user may choose to “Rectify exceptions to re-upload” or “Proceed to upload with exceptions”.
13. If PROCEED TO UPLOAD WITH EXCEPTIONS, message as shown below will be displayed.



14. If RECTIFY EXCEPTIONS TO RE-UPLOAD, user may further rectify the upload file and repeat step 11 and 12.
15. For upload file without any error, after VALIDATE, file will be successfully uploaded, and Movement History will be automatically added with Approval Status = Auto Approved.

The screenshot shows a table titled "MOVEMENT HISTORY" with a search bar and a list of records. The table has the following columns: Ref No, Policy No, Submission Time, Type, Approval Status, Uploaded By, Records, and Billing Doc. The records are as follows:

Ref No	Policy No	Submission Time	Type	Approval Status	Uploaded By	Records	Billing Doc
LD00220317043003194	GKK5566	17/03/2022 16:30:03	Upload file	Auto approved	My New Company HR User	1	
LD00220317043845412	GKK5566	17/03/2022 16:28:45	Upload file	Auto approved	My New Company HR User	1	
LD00220317041941410	GKK5566	17/03/2022 16:19:43	Upload file	Pending	My New Company HR User	3	
LD00220317029527172	GKK5566	17/03/2022 14:55:27	Upload file	Auto approved	Shu Shin HR	2	

16. Click at the Ref No (in blue) to view details.

Claims

This page facilitates the submission of new claims and provides access to existing claim records. Users can filter records based on selected criteria, view claim details and submit new claims.

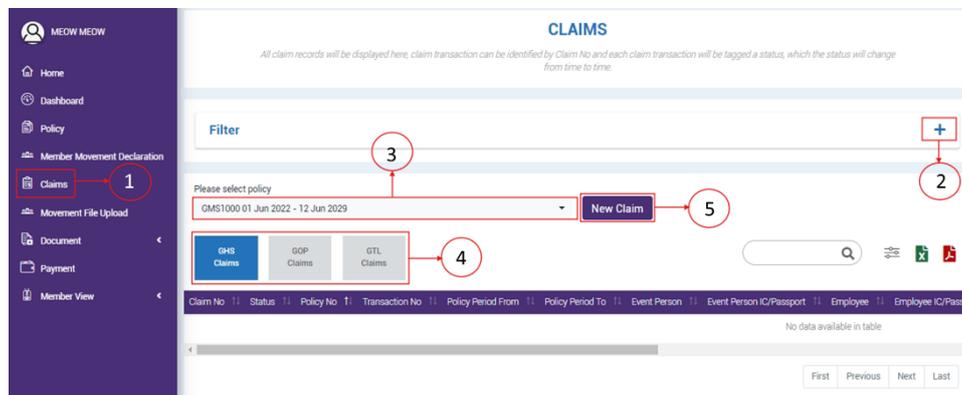


Figure 5: Claims Interface.

1. Navigate to the “Claims” section in the menu panel.
2. Click the “+” button to open the filter box, to filter the records based on the selected criteria (Optional).

User can filter based on the claim status, claim type, company, intimation from date or intimation to date.

Figure 6: Filter Options.

Column	Description
Claim Status	The status of the claim
Claim Type	The type of claim being filed.
Company	The company associated with the claim.
Intimation From Date	The start date range for claim intimation.
Intimation To Date	The end date range for the claim intimation.
View List	To proceed filtering based on selected criteria.

3. Select the policy number from the drop-down list.
4. Select the product type:

- a. GHS Claims.
- b. GOP Claims.
- c. GTL Claims.

Please select policy
ABC1234 01 Jul 2023 - 30 Jun 2024 New Claim

GHS Claims
GOP Claims
GTL Claims

Claim No	Status	Policy No	Transaction No	Policy Period From	Policy Period To	Event Person	Event Person IC/Passport	Employee	Employee IC/Passport
Pending	Pending	ABC1234-GOP	20231019151826669	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231107130829776	01 Jul 2023	30 Jun 2024	KATTY LEONG	700210105874	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231107130829776	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231107135935670	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231107135935672	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231116181625331	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231219152052137	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20231219152756043	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20240416094242146	01 Jul 2023	30 Jun 2024	CHENG MEONG	850103085745	AH KEONG	680113085784
Pending	Pending	ABC1234-GOP	20240416102602240	01 Jul 2023	30 Jun 2024	AH KEONG	680113085784	AH KEONG	680113085784

Figure 7: Sample claim records for policy ABC1234, GOP Claims product Type.

- Click “Pending” under status column to view the claim information in detail.

← BACK TO CLAIMS SUMMARY

POLICY INFO		CLAIM INFO	
Policy No	ABC1234	Claim No	
Policy Period	from 01 Jul 2023 until 30 Jun 2024	Claim Type	Group Outpatient
Policy Holder	HARTFORD STEAM BOILER (M) SDN BHD	Event Person	AH KEONG
Product Type	GOP	Event Person IC / Passport No	680113085784
LETTERS & CORRESPONDENCES		Employee	AH KEONG
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_id-of-event-person_1.pdf	Employee IC / Passport No	680113085784
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_e-payment-form_2.pdf	Relationship	SELF
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_supporting-document_3.pdf	Company	HARTFORD STEAM BOILER (M) SDN BHD
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_id-of-employee_4.pdf	Transaction No	20231019151826669
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_referral-letter_5.pdf	Intimation Date	07 Nov 2023
19 Oct 2023	9b655cbc-d3a7-4195-0f97-08dbd073966f_receipt_6.pdf	Date of Event	01 Nov 2023
		Status	Pending
		Mode of Submission	e-Claim
		CLAIM DETAILS	

Figure 8: Sample claims information.

- 5. Click “New Claim” to submit new claim based on selection in step 3 and 4.

New Claim Submission Process:

Step 1: New Claim submission:

The screenshot displays the 'New Claim' submission interface. At the top, it shows the Policy No. (GMS1000) and Product (Group Term Life). Below this, there is a dropdown menu to 'Select a member whom you would like to submit the claim for'. A progress indicator shows three steps, with the first step (1) being the current active step. The form fields include: 'This is a' with radio buttons for 'New Claim' (selected) and 'Pending Claim'; 'I'm submitting a claim for' with a dropdown for 'Select claim type'; 'Event Person' field; 'Date of Event' and 'Venue' pickers; 'Cause of Event' with radio buttons for 'Accidental' (selected) and 'Non-Accidental'; a text area for 'How did the accident occur? Please explain'; and a 'Diagnosis / Illness' field. A note at the bottom states 'NOTE: All fields are required to be filled.' and there are 'Cancel', 'Save as Draft', and 'Next' buttons.

Figure 9: step 1 of "New Claim" for GTL interface.

Step	Product Type: GHS/GOP	Product type: GTL	Remarks
1. Claim Types	Users can select "New Claim" or "Pending Claim".	Users can select "New Claim" or "Pending Claim".	-
2. Select Member	Users must select member who they wish to submit the claim from drop-down list.	Users must select member who they wish to submit the claim from drop-down list.	-
4. Select Claim Type no.	Users choose the claim type from the drop-down list.	Users choose the claim type from the drop-down list.	Selection for "Pending Claim", where the claim status = "Pending" or "Notified" only will be shown in the list, else it won't showing any listing.
5. Event Person	System automatically displays based on the selected member.	System automatically displays based on the selected member.	-
6. Date of Event	Users select the date of event from a date-picker.	Users select the date of event from a date-picker.	-
7. Venue	Users enter the venue of the event.	Users enter the venue of the event.	-
8. Hospital/Clinic	Users select the panel hospital/clinic from a drop-down list.	N/A	Admin settings.

9. If Hospital/ Clinic not listed	Users manually enter if the hospital/clinic not in (8).	N/A	-
10. Cause of Event	Users choose between Accidental or Non-Accidental.	Users choose between Accidental or Non-Accidental.	-
11. Explanation on the Accident Occur	Users enter the event details	Users enter the event details	This field will only appear if the "Cause of Event" is Accidental.
12. Diagnosis/ Illness	Users enter diagnosis/illness details.	Users enter diagnosis/illness details.	-
13. "Cancel" button	Allows users to return to the Claims page.	Allows users to return to the Claims page.	-
14. "Save as Draft" button	Saves the record as a draft for future editing.	Saves the record as a draft for future editing.	Only one draft per user, auto deleted after 24 hours.
15. "Next" button	Proceeds to the next step of claim submission.	Proceeds to the next step of claim submission.	-

Step 2: Terms and Conditions Acceptance:

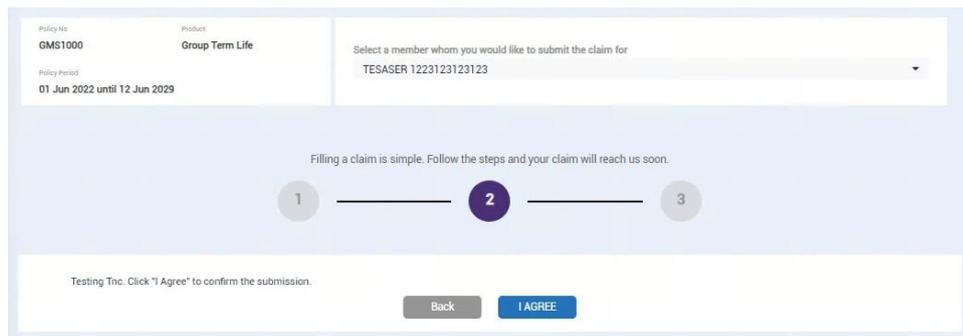


Figure 10: step 2 of "New Claim" interface.

Users must agree to the displayed terms and conditions as defined in the admin user manual before proceeding.

Step 3: Upload Document:

Upload necessary documents according to the specified types and controls.

- Max file size per submission is up to 5MB.
- Max files to upload is up to 20 files (per submission record).
- File format to be supported – JPEG, JPG and PDF only.

Policy No: **GMS1000** Product: **Group Term Life** Select a member whom you would like to submit the claim for:

Policy Period: **01 Jun 2022 until 12 Jun 2029**

Filing a claim is simple. Follow the steps and your claim will reach us soon.

1 ————— 2 ————— 3

Please upload relevant documents required for the claim, kindly take note on the file format and file size allowed.

- File formats supported include PDF, JPEG & JPG.
- Total file size for all files should not exceed 5MB.
- A total of up to 20 files can be uploaded in each submission.
- New Claim - all documents are required.
- Pending Claim - at least one document is required.

Claim Form

Attending Physician Statement

Death Certificate Issued by Share Registrar

ID of Event Person

E-Payment Form

Multiple Supporting Document(s)

Figure 11: step 3 of "New Claim" for GTL interface.

Column	Product Type			Remarks
	GHS	GOP	GTL	
Claim & E-Payment Form	Attach both claim and e-payment forms.	N/A	N/A	Compulsory for new claims.
Medical Report (Optional)	Optional attachment for medical report.	N/A	N/A	Optional for both new and pending claims.
ID of Event Person	Attach identification of the event person.	Attach identification of the event person.	Attach identification of the event person.	Compulsory for new claims, optional for pending claims.
ID of Employee	Attach identification of the employee.	Attach identification of the employee.	Attach identification of the employee.	Compulsory for new claims, optional for pending claims.
e-Payment Form	N/A	Optional attachment for electronic payment form.	N/A	Optional for both new and pending claims.
Referral Letter	N/A	Optional attachment for referral letter.	N/A	Optional for both new and pending claims.
Claim Form	N/A	N/A	Compulsory attachment for claim form.	Compulsory for new claims, optional for pending claims.
Attending Physician Statement	N/A	N/A	Compulsory for specific claim types.	Compulsory for specific claim types.

				types, optional for pending claims.
Death Certificate	N/A	N/A	Compulsory for specific claim type.	Compulsory for specific claim types, optional for pending claims.
Supporting Document	Optional attachment for supporting documents.	Optional attachment for supporting documents.	Optional attachment for supporting documents.	Optional for both new and pending claims.
Receipt	Attachment, receipt date, receipt number, amount	Attachment, receipt date, receipt number, amount	N/A	Compulsory for new claims, optional for pending claims.

Step 4: Claim Submission:

Click “Submit” to finalize the claim submission. A confirmation message will appear upon successful submission.

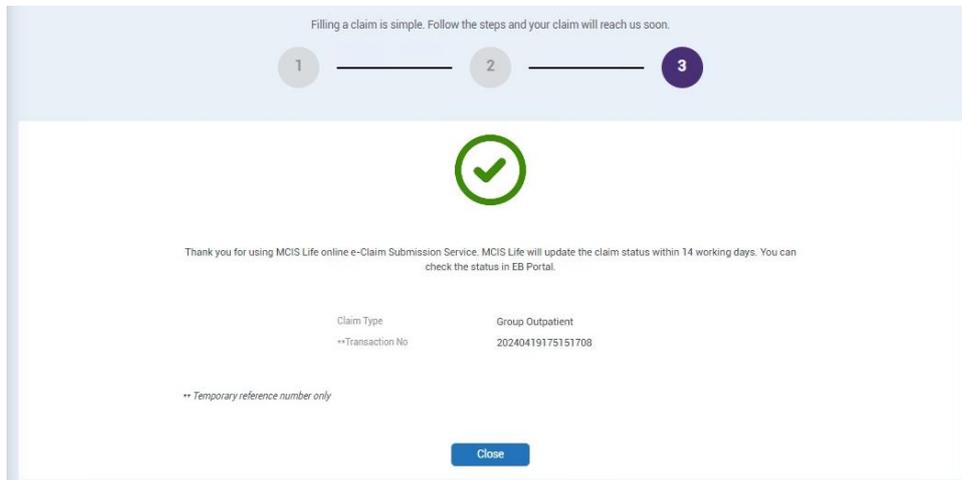
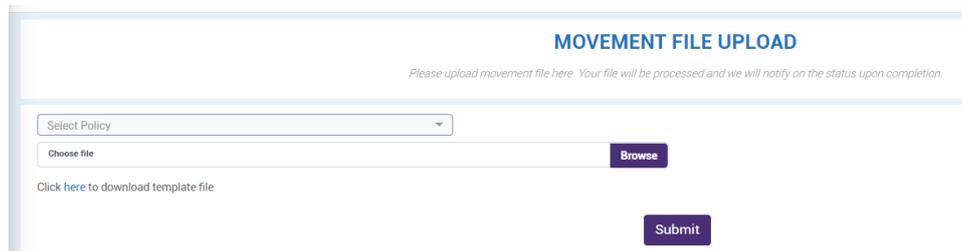


Figure 12: Successful submitted interface.

Movement File Upload

1. Navigate to and click at “Movement File Upload” in menu panel, Movement File Upload page will be loaded.

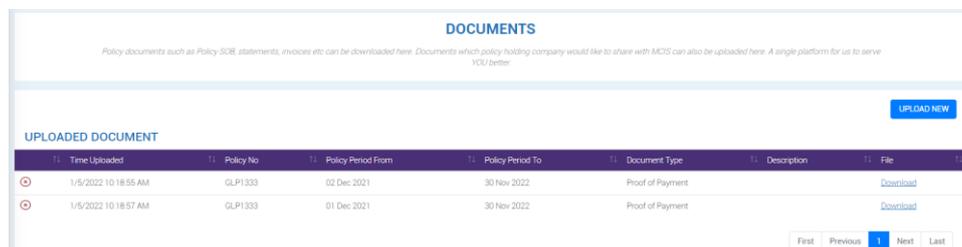


2. Upload 1 movement file at a time.
3. To upload, click Select Policy No
4. Browse for file and click SUBMIT.
5. Uploaded file will be processed by MCIS accordingly.

Upload Document

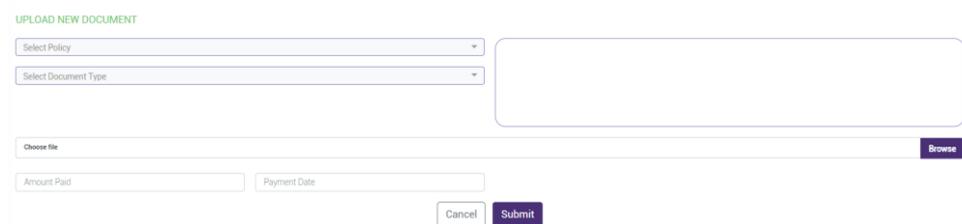
Upload Proof of Payment

1. Navigate to and click at “Document” in menu panel, choose Upload Documents and Documents page will be loaded.



Time Uploaded	Policy No	Policy Period From	Policy Period To	Document Type	Description	File
1/5/2022 10:18:55 AM	GLP1333	02 Dec 2021	30 Nov 2022	Proof of Payment		Download
1/5/2022 10:18:57 AM	GLP1333	01 Dec 2021	30 Nov 2022	Proof of Payment		Download

2. To upload proof of payment, click UPLOAD NEW.



3. Fill up the following compulsory details to submit.
 - Policy No
 - Document Type – select proof of payment.
 - Brief description of the upload
 - Amount Paid

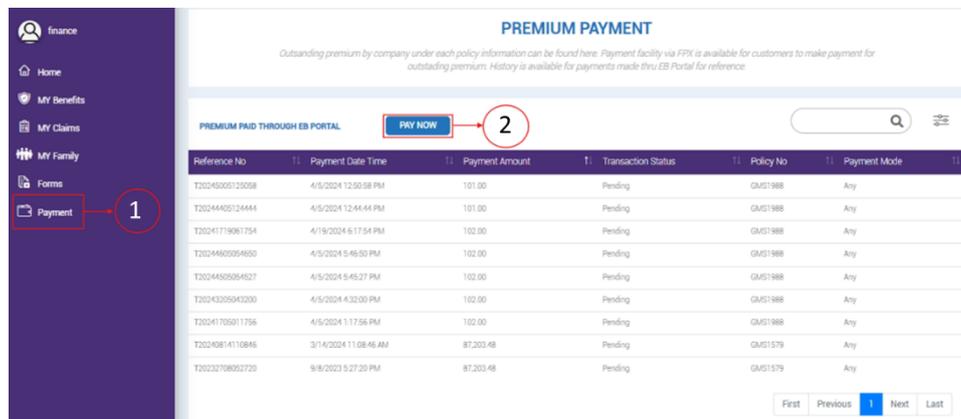
- Payment Date

4. Browse for the file and click SUBMIT to send this MCIS Life.
5. All uploaded files can be viewed in the Uploaded Documents list.

Payment

The Payment page allows you to make premium payments for policies. Follow the steps below to complete a payment:

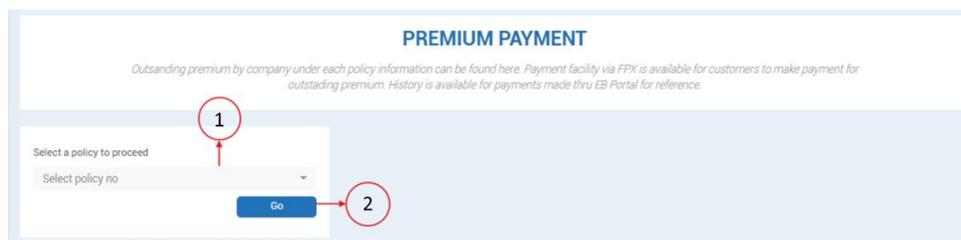
Step 1: Access the Payment page.



Sample Screen 9: Payment Screen.

1. Click on “Payment” in the menu panel to open the Payment section.
2. Click the “PAY NOW” button to start the payment process.

Step 2: Select the Policy.



Sample Screen 10: Policy Page.

1. Choose the policy number from the drop-down list.
 - Note: Only policies with outstanding premiums that accessible by the HR will appear.
2. Click the “Go” button to proceed.

Step 3: Add Payment Details.

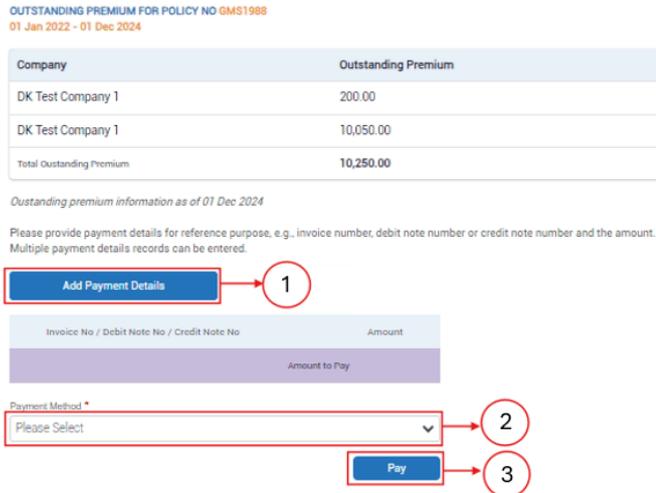


Figure 13: Sample screen with outstanding premium.

1. Click “Add Payment Details” to enter payment information.
 - User can add multiple payment records as long as the total payment amount does not exceed the total outstanding balance.
 - Enter the following:

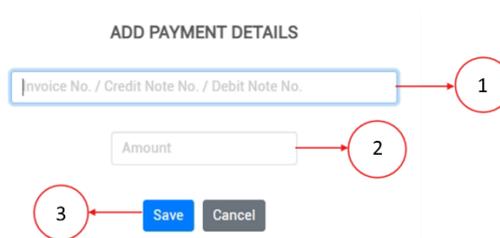


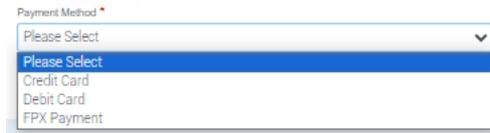
Figure 14: Add Payment Details screen.

- **Invoice/Credit Note/Debit Note Number:** Input the relevant number.
- **Outstanding Amount:** Enter the full outstanding amount for the selected policy.
- Click “**Save**” to store the payment details.



Sample Screen 11: Once click “Save” button.

2. Select the Payment Method from the drop-down list.
 - Supported payment method: Credit Card, Debit Card and FPX Payment.



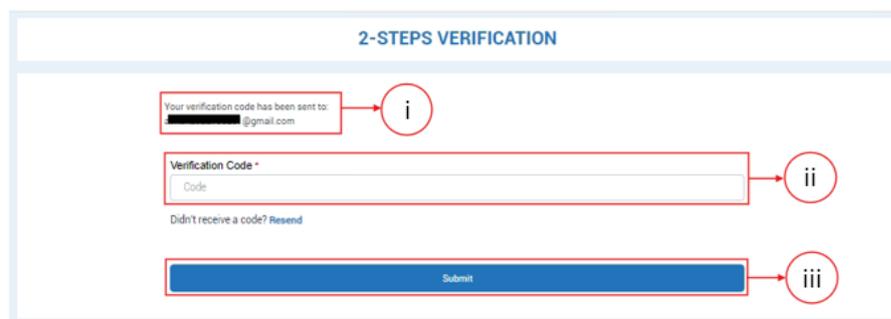
Sample Screen 12: Payment Method.

3. Click "Pay" to proceed with the payment.

Note: If the outstanding amount exceeds a certain limit, the system will initiate 2FA (Two-Factor Authentication) using OTP (One-Time Password).

Step 4: Complete OTP Verification.

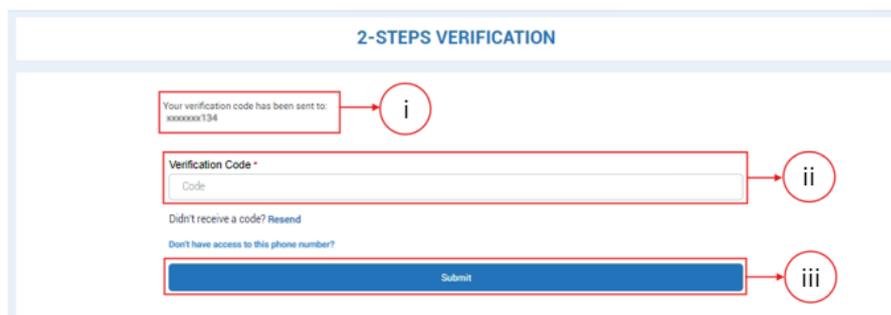
- In an email address is registered:



Sample Screen 13: Email Address.

- i. The system will send an OTP to the registered email.
- ii. Enter the OTP in the provided field.
 - If the OTP isn't received, click "Resend" to generate a new OTP. This option becomes available once the OTP Retry Duration countdown becomes 0.
- iii. Click "Submit" to continue.

- If no email address is registered but a mobile number is available:



Sample Screen 14: Email Address.

- i. The OTP will be sent via SMS.
- ii. Enter the OTP received by SMS.
 - If the OTP isn't received, click "Resend" for a new OTP. This option becomes available once the OTP Retry Duration countdown reaches 0.
 - If user don't have access to the registered phone number, click "Don't have access to this phone number?" to see instructions on updating your contact information (Figure 16).

Contact Customer Support

If you do not have access to the phone number associated with your account, please contact our Customer Support team for assistance in updating your contact information.

Contact Us:
 Customer Contact Center: +603 7652 3388
 Email: customerservice@mclis.my

Our team is available to help you with any issues or questions you may have.

Close

Figure 15: Contact Customer Support screen.

- iii. Click "Submit" to continue.

- If neither email nor mobile number available:



No email address and phone number are associated with your user account, please contact our Customer Support team for assistance in updating your contact information.

Contact Us:
 Customer Contact Center: +603 7652 3388
 Email: customerservice@mclis.my

Our team is available to help you with any issues or questions you may have.

Close

Sample Screen 15: Error message.

- i. The system will display an error message indicating that no contact information was found.

Step 5: Proceeding with Payment.

- If the entered amount triggers OTP verification:
 - i. Complete the OTP verification process in Step 4.
 - ii. Once the OTP verification is successful, the system will redirect user to the payment gateway.

- If the entered amount is less than the Min Amount to Trigger OTP:
 - i. The system will skip the OTP verification and directly redirect user to the payment gateway.

Merchant Logo Here

MCIS Insurance Berhad

L5-E-7B, Enterprise 4,
Technology Park Malaysia, eGHL,
Bukit Jalil, 57000 Kuala Lumpur,
Wilayah Persekutuan, Malaysia

e : stb@std.comm
t : +603-8999 3600

TIME REMAINING | 12:51

PAYMENT DETAILS

Order ID	Payment ID	Order Description	Total
EB202408261000000029	202408261000000029	GMS175020243926	MYR1.00

PAY WITH CREDIT CARD / DEBIT CARD

CARDHOLDER NAME

Name appears on your card

CARD NUMBER

CARD TYPES

VISA

EXPIRATION DATE

MM

/

YYY

CVV

CVV2

Figure 16: Screen where user can make the payment (iPay88).

Note: The displayed amount may appear as RM1.00 in test scenarios but the actual payment amount will be displayed during a real transaction.

Member View

The “Member View” section provides access to various modules and features tailored for HR users to manage self-related information effectively. Below an overview of the functionalities available within the Member View.

Home

This page serves as a central dashboard for HR users offering quick access to essential information and functionalities.

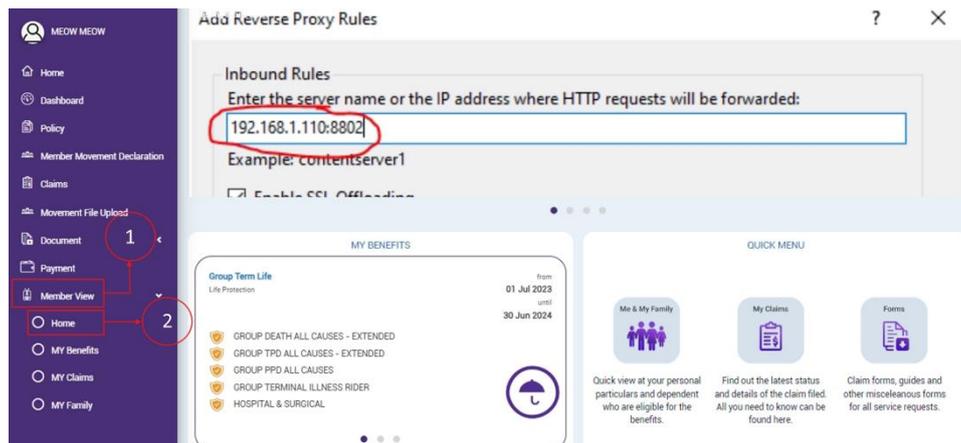


Figure 17: Home Interface.

1. Navigate the “Member View” section in the menu panel.
2. Within the “Member View” section, choose the option labelled “Home”.
3. Breakdown each section in details:
 - a. Marketing Content (Carousel):
 - i. At the top of the page, there is a carousel displaying marketing content. This content rotates automatically or can be navigated using navigation dots below the carousel.
 - ii. HR users can view promotional content, announcements or other relevant information provided by the system administrator.
 - b. My Benefits:
 - i. This section presents HR users with a summary of their benefits in a card format.
 - ii. Each card represents a different product type, displaying the supplementary benefits attached to that product type.
 - iii. Additionally, the coverage effective date and expiration date are provided for each benefit.
 - iv. HR users can click on a card to view more detailed information which redirects them to the MY Benefits page.

c. Quick Menu:

- i. The Quick Menu provides convenient shortcuts to frequently accessed pages.
 - i. Me & My Family: This shortcut redirects HR users to the
 - ii. **MY** Family page, allowing them to view personal and family member information.
 - iii. MY Claims: Clicking this shortcut directs HR users to the **MY Claims** page where they can view and manage claim-related information.
 - iv. Forms: This shortcut redirects HR users to the Form & Guides page where they can access and download various forms or documents.



Figure 18: Forms & Guides interface.

- a. Access Forms & Guides: Users will be automatically redirected to the Forms & Guides interface.
 - b. Select Document Type: Users can choose the desired document type from the provided drop-down list.
 - c. Download the Document: After selecting the document type, simply click on the “Go” button to initiate the download process. The selected document will be downloaded automatically to the user’s device.
- d. Marketing Content (Highlight):
- i. This section displays highlighted marketing content in more detail.
 - ii. HR users can access detailed information about specific marketing materials and promotions.
 - iii. A "View All" button allows HR users to access all marketing content available in the system.

Note: The availability of marketing content depends on the settings configured by the system administrator (_Admin). If the administrator allows HR access to marketing content, it will be visible on the Home page.

MY Benefits

This section provides users with comprehensive access to their benefits information.

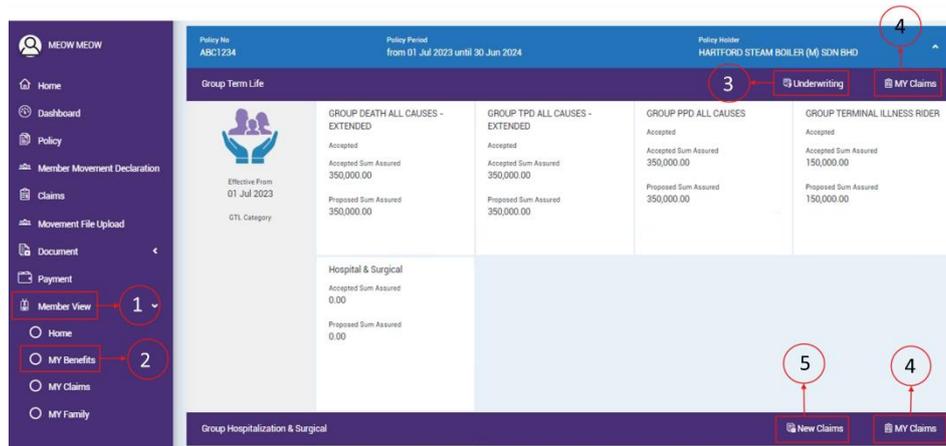


Figure 19: MY Benefits interface.

1. Navigate the “Member View” section in the menu panel.
2. Then, select “MY Benefits”.
3. View underwriting information.
 - a. Access Underwriting Information:
 - i. Click on "Underwriting" to gain insights into underwriting details.
 - ii. Users will only see underwriting records associated with policies accessible by HR. These records will display either “PENDING” or “COMPLETED” status.
 - b. Explore Underwriting Details:
 - i. Within each underwriting (UW) record, users can delve into UW Details, providing them with crucial information such as:
 - UW Completion Status.
 - UW Status by Benefits including:
 - Benefit.
 - Proposed sum assured.
 - Accepted sum assured.
 - UW Status.
 - c. Upload Underwriting Requirement Documents:

← BACK TO MY BENEFITS

UNDERWRITING INFO

LW Completion Status
Completed

Please submit documents as described below for Underwriting processing purpose.

1 Please submit your GTL Proposal Form here

Choose file

2 Please submit your Medical Report, questionnaire & supporting documents, if any

Choose file

Underwriting Status by Benefit

<p>GROUP DEATH ALL CAUSES - EXTENDED</p> <p>Proposed Sum Assured 350,000.00</p> <p>Accepted Sum Assured 350,000.00</p> <p style="text-align: right;">Accepted</p>	<p>GROUP TPD ALL CAUSES - EXTENDED</p> <p>Proposed Sum Assured 350,000.00</p> <p>Accepted Sum Assured 350,000.00</p> <p style="text-align: right;">Accepted</p>
<p>GROUP PPD ALL CAUSES</p> <p>Proposed Sum Assured 350,000.00</p> <p>Accepted Sum Assured 350,000.00</p> <p style="text-align: right;">Accepted</p>	<p>GROUP TERMINAL ILLNESS RIDER</p> <p>Proposed Sum Assured 150,000.00</p> <p>Accepted Sum Assured 150,000.00</p> <p style="text-align: right;">Accepted</p>

Figure 20: Sample underwriting information interface with pending requirements.

- i. For records with a "PENDING" underwriting status, users can upload necessary underwriting requirement documents.
- ii. The process involves:
 1. Selecting the specific underwriting requirement.
 2. Browsing for the file to be uploaded.
 3. Submitting.
4. View claims information.

Click [Figure 21](#): MY Claims interface. to view the claim information interface.

5. Submit new claim.

Click [42](#) to view instruction on how to submit the new claim.

MY Claims

The MY Claims section offers users the ability to manage and submit claims conveniently.

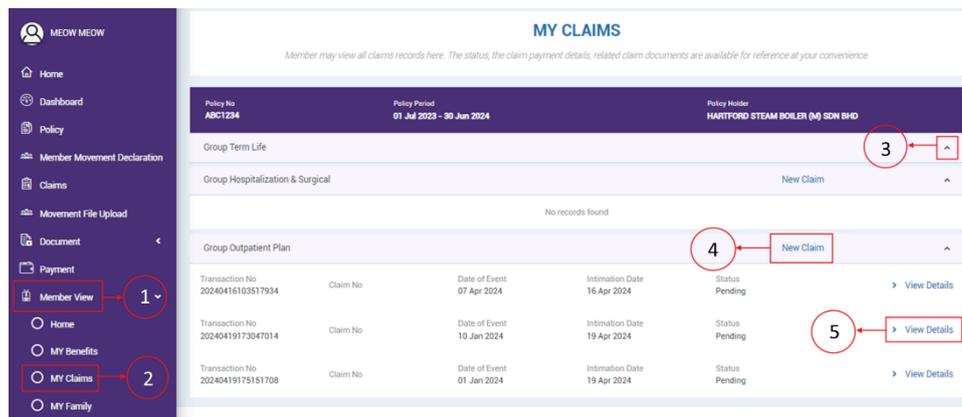


Figure 21: MY Claims interface.

1. Navigate the “Member View” section in the menu panel.
2. Select “MY Claims” from the available options.
3. Expand Product Type Claims:
 - i. Access the desired product type claims for submission.
4. Submit New Claim for HR Own Policy:
 - i. Users can initiate a new claim submission for their HR-owned policy.

The screenshot shows the 'Step 1: New Claim Interface for GTL'. At the top, it displays policy details: Product (Group Outpatient Plan), Policy No (ABC1234), Policy Period (01 Jul 2023 until 30 Jun 2024), and Policy Holder (HARTFORD STEAM BOILER (M) SDN BHD). Below this is a progress indicator with three steps, where step 1 is active. The form contains the following fields:

- 'This is a' section with radio buttons for 'New Claim' (selected) and 'Pending Claim'.
- 'I'm submitting a claim for' dropdown menu with 'Select claim type'.
- 'Event Person' section with radio buttons for 'Self' (selected) and 'Dependent'.
- 'Event Person' dropdown menu with 'MEOW MEOW' selected.
- 'Date of Event' and 'Venue' text input fields.
- 'Hospital / Clinic' dropdown menu with 'Select Hospital / Clinic'.
- A text input field for 'If the hospital / clinic visited not in the list above, please specify the name here instead'.
- 'Cause of Event' section with radio buttons for 'Accidental' (selected) and 'Non-Accidental'.
- 'How did the accident occur? Please explain' text input field.
- 'Diagnosis / Illness' text input field.

A note at the bottom states 'NOTE: All fields are required to be filled.' At the bottom right are three buttons: 'Cancel', 'Save as Draft', and 'Next'.

Figure 22: Step 1: New Claim Interface for GTL.

Step 1: New Claim submission:

Step	Product Type: GHS/GOP	Product type: GTL	Remarks
1. Claim Types	Users can select “New Claim” or “Pending Claim”.	Users can select “New Claim” or “Pending Claim”.	-
2. Claim For	Users specify whether the claim is for self or dependent.	Users specify whether the claim is for self or dependent.	-
3. Select Dependent	Users select the dependent’s name	Users select the dependent’s name	For selection “Dependent” in (2).
4. Select Claim Type no.	Users choose the claim type from the drop-down list.	Users choose the claim type from the drop-down list.	Selection for “Pending Claim”, where the claim status = “Pending” or “Notified” only will be shown in the list, else it won’t showing any listing.
5. Event Person	System automatically displays based on the selected member.	System automatically displays based on the selected member.	-
6. Date of Event	Users select the date of event from a date-picker.	Users select the date of event from a date-picker.	-
7. Venue	Users enter the venue of the event.	Users enter the venue of the event.	-
8. Hospital/Clinic	Users select the panel hospital/clinic from a drop-down list.	N/A	Admin settings.
9. If Hospital/ Clinic not listed	Users manually enter if the hospital/clinic not in (8).	N/A	-
10. Cause of Event	Users choose between Accidental or Non-Accidental.	Users choose between Accidental or Non-Accidental.	-
11. Explanation on the Accident Occur	Users enter the event details	Users enter the event details	This field will only appear if the “Cause of Event” is Accidental.
12. Diagnosis/ Illness	Users enter diagnosis/illness details.	Users enter diagnosis/illness details.	-
13. “Cancel” button	Allows users to return to the Claims page.	Allows users to return to the Claims page.	-
14. “Save as Draft” button	Saves the record as a draft for future editing.	Saves the record as a draft for future editing.	Only one draft per user, auto deleted after 24 hours.
15. “Next” button	Proceeds to the next step of claim submission.	Proceeds to the next step of claim submission.	-

Step 2: Terms and Conditions Acceptance:

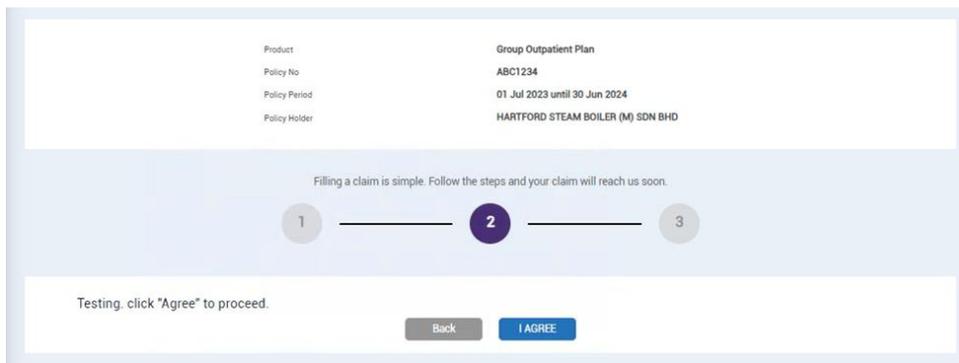


Figure 23: step 2 of "New Claim" interface.

Users must agree to the displayed terms and conditions as defined in the admin user manual before proceeding.

Step 3: Upload Document:

Upload necessary documents according to the specified types and controls.

- Max file size per submission is up to 5MB.
- Max files to upload is up to 20 files (per submission record).
- File format to be supported – JPEG, JPG and PDF only.

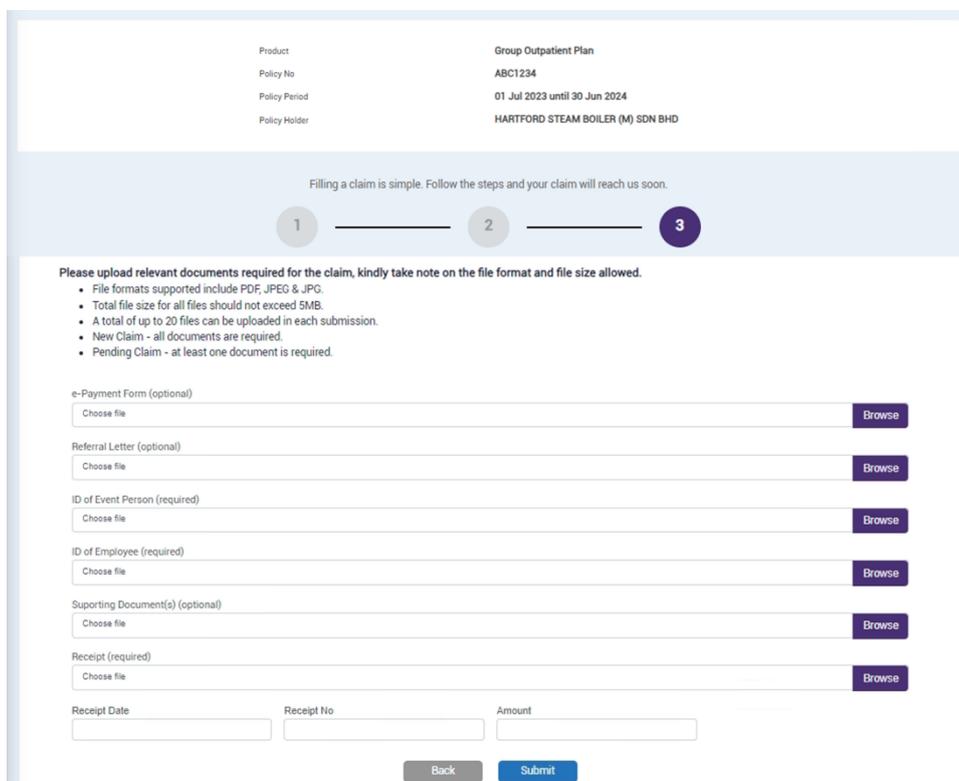


Figure 24: step 3 of "New Claim" for GTL interface.

Column	Product Type			Remarks
	GHS	GOP	GTL	
Claim & E-Payment Form	Attach both claim and e-payment forms.	N/A	N/A	Compulsory for new claims.
Medical Report (Optional)	Optional attachment for medical report.	N/A	N/A	Optional for both new and pending claims.
ID of Event Person	Attach identification of the event person.	Attach identification of the event person.	Attach identification of the event person.	Compulsory for new claims, optional for pending claims.
ID of Employee	Attach identification of the employee.	Attach identification of the employee.	Attach identification of the employee.	Compulsory for new claims, optional for pending claims.
e-Payment Form	N/A	Optional attachment for electronic payment form.	N/A	Optional for both new and pending claims.
Referral Letter	N/A	Optional attachment for referral letter.	N/A	Optional for both new and pending claims.
Claim Form	N/A	N/A	Compulsory attachment for claim form.	Compulsory for new claims, optional for pending claims.
Attending Physician Statement	N/A	N/A	Compulsory for specific claim types.	Compulsory for specific claim types, optional for pending claims.
Death Certificate	N/A	N/A	Compulsory for specific claim type.	Compulsory for specific claim types, optional for pending claims.
Supporting Document	Optional attachment for supporting documents.	Optional attachment for supporting documents.	Optional attachment for supporting documents.	Optional for both new and pending claims.
Receipt	Attachment, receipt date, receipt number, amount	Attachment, receipt date, receipt number, amount	N/A	Compulsory for new claims, optional for pending claims.

Step 4: Claim Submission:

Click "Submit" to finalize the claim submission. A confirmation message will appear upon successful submission.

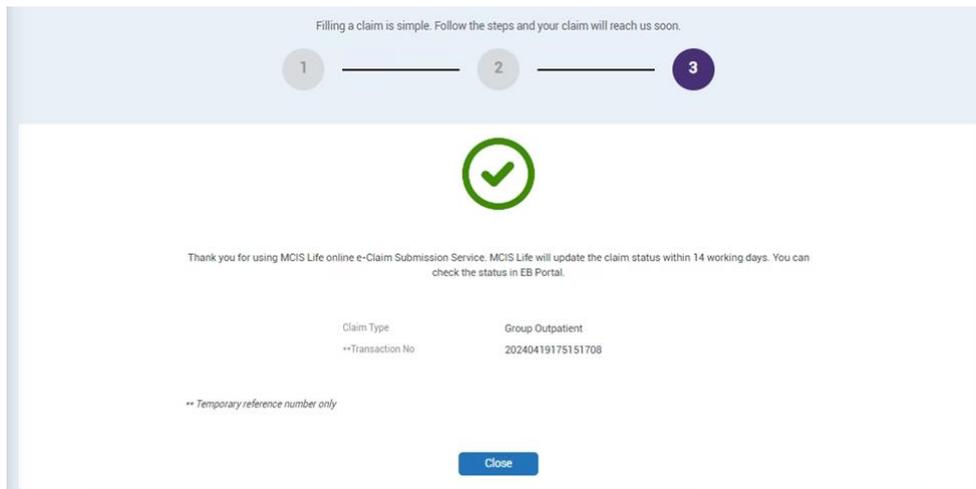


Figure 25: Successful submitted interface.

5. View claim details.

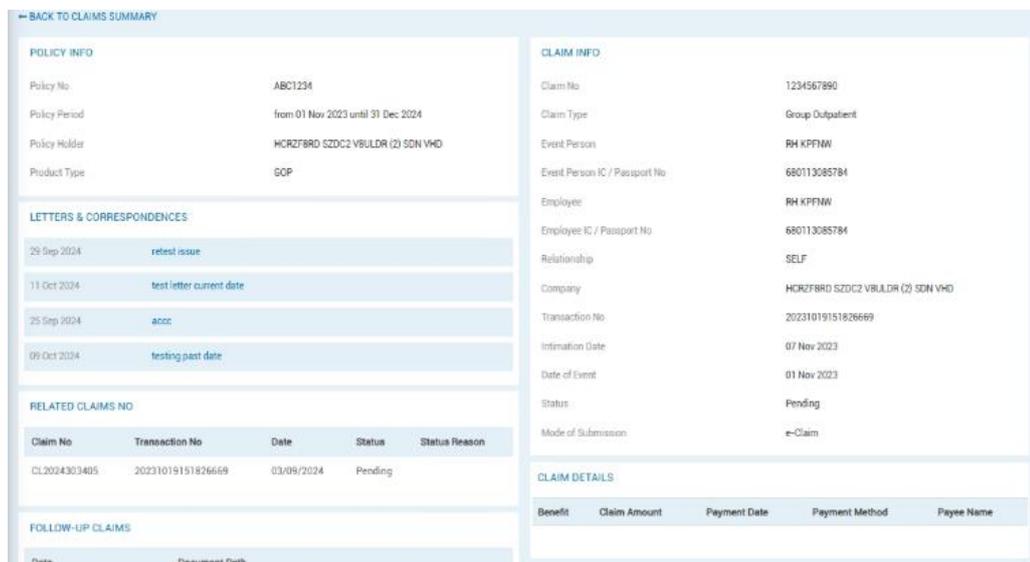


Figure 26: Sample Claim Details interface.

Users can view detailed claim information including policy and claim details, letters & correspondences and claim specifics.

i. Policy Info:

- This section provides essential information about the policy related to the claim, including:
 - Policy number
 - Policy period
 - Policy holder
 - Product type

- ii. Claim Info:
 - This section presents comprehensive details about the claim, such as:
 - Claim no
 - Claim type.
 - Event person (the individual involved in the claim event)
 - Event person's identification (IC/passport number)
 - Employee (Employee's name)
 - Employee IC / Passport No
 - Relationship between the claimant and the policyholder
 - Company associated with the claim.
 - Transaction number (Auto-generated by the system for tracking)
 - Intimation date (date of claim submission)
 - Date of event (the date when the claim event occurred)
 - Claim status (whether pending, approved, etc.)
 - Mode of submission (whether submitted manually or through e-claim)
- iii. Letters & Correspondences:
 - This section lists all documents attached or related with the claim including:
 - Date of attachment.
 - File name or description of the document.
- iv. Related Claims No:
 - This section will provide the details of claim that related to this claim no including:
 - Claim No.
 - Transaction No.
 - Date.
 - Status.
 - Status Reason.
- v. Follow-Up Claims:
 - This section will display the information for the follow-up claims such as:
 - Date.
 - Document Path.
- vi. Claim Details:
 - This section provides specific details related to the claim such as:
 - Benefit(s) claimed.
 - Claim amount.
 - Payment date (If applicable)
 - Payee name (If applicable)

MY Family

In the "MY Family" interface, each family member's information of the HR is displayed in a card format allowing users to easily view the details of each individual. Here's how the cards are structured:

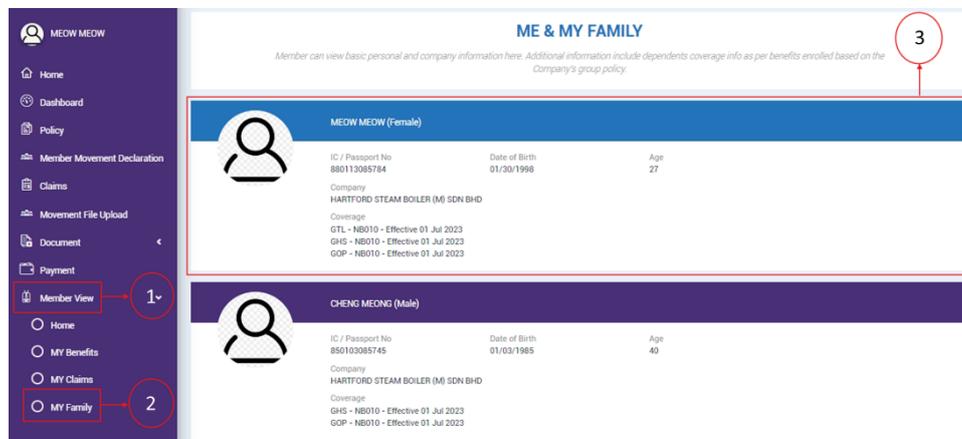


Figure 27: MY Family interface.

1. Navigate to the "Member View" section in the menu panel.
2. From the available options, select "MY Family" to access the relevant information.
3. Self and Family Details:
 - Upon accessing the "MY Family" interface, HR users can view personal and family member particulars.
 - First Card (Self):
 - Name (Gender): The HR's name is displayed, along with their gender in parentheses, indicating that this card represents the HR user themselves.
 - IC (Identification Card) or Passport No: This crucial identification information is prominently displayed.
 - Date of Birth: Next to the IC/Passport No, the HR user's date of birth is presented.
 - Age: Adjacent to the Date of Birth, the current age of the HR user is provided.
 - Company: This section lists the company associated with the HR user, providing context for the policy coverage.
 - Coverage: The specific product(s) covered by the policy for the HR user are outlined here, along with the effective date of coverage.
 - Subsequent Cards (Family Members):
 - For each additional family member, a separate card follows the same format as the first card.
 - Name (Gender): The family member's name is displayed, along with their gender in parentheses.

- IC (Identification Card) or Passport No: The family member's identification information is prominently displayed.
- Date of Birth: Next to the IC/Passport No, the family member's date of birth is presented.
- Age: Adjacent to the Date of Birth, the current age of the family member is provided.
- Company: This section lists the company associated with the policy coverage for the family member.
- Coverage: The specific product(s) covered by the policy for the family member are outlined here, along with the effective date of coverage.