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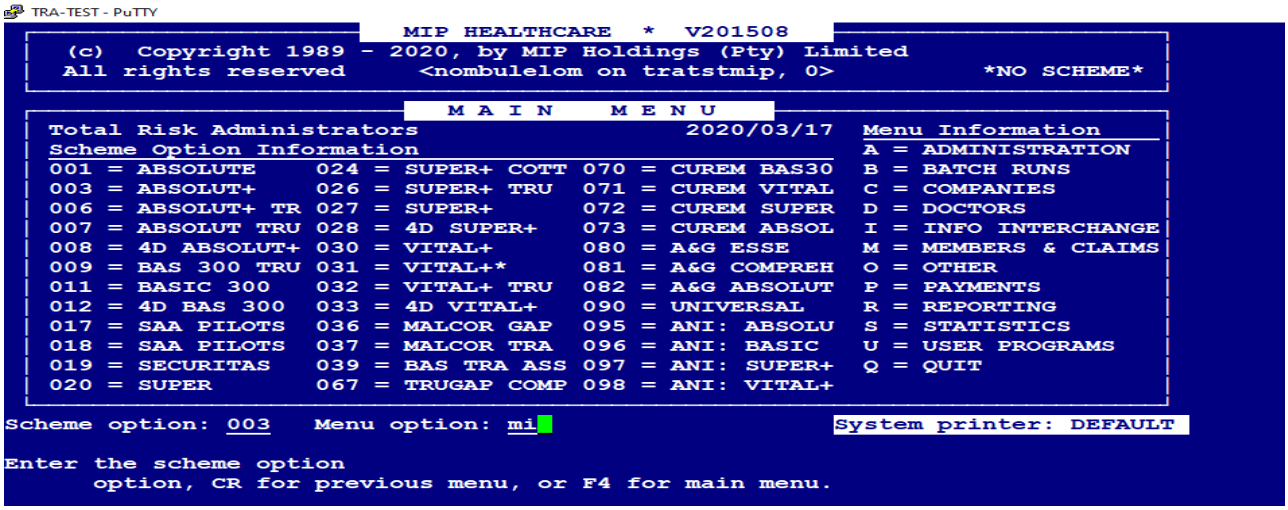
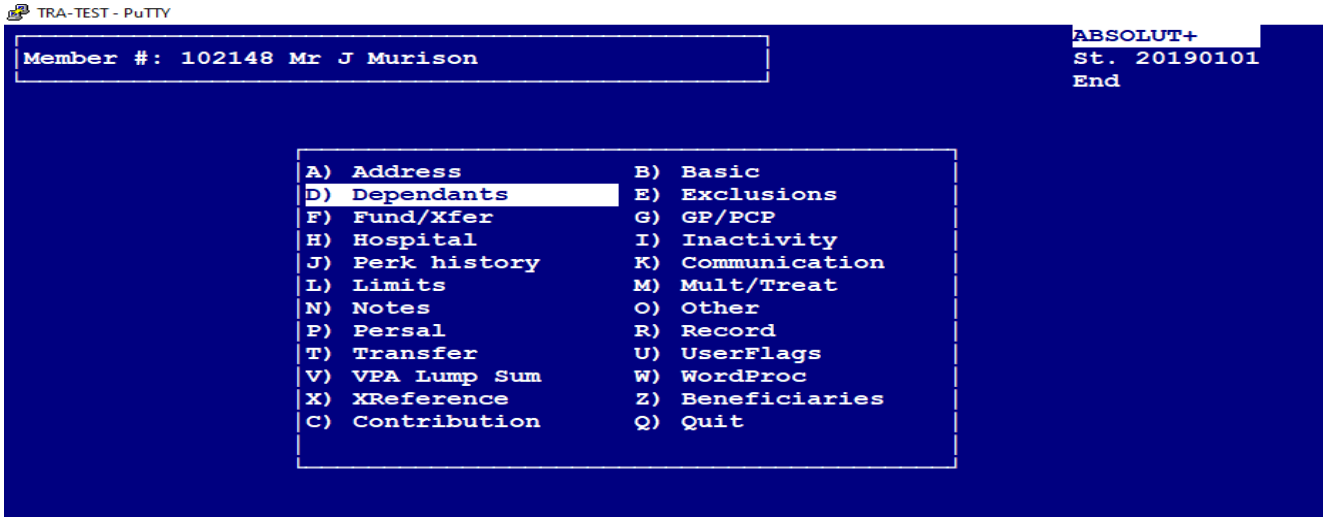
HOW TO CHANGE A MAIN MEMBER

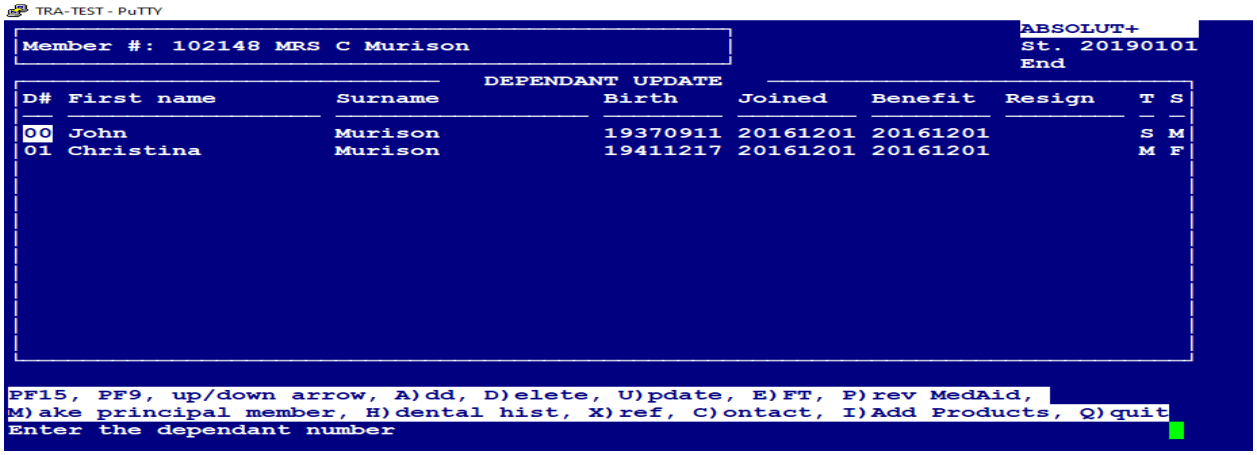
- When the main member passes on, the dependant can choose to continue with the policy.
- In this case we then need to do a main member swap.
- Once we receive the update form and required supporting documents, the request is indexed against the member's policy and actioned in Putty in the MIU menu option.



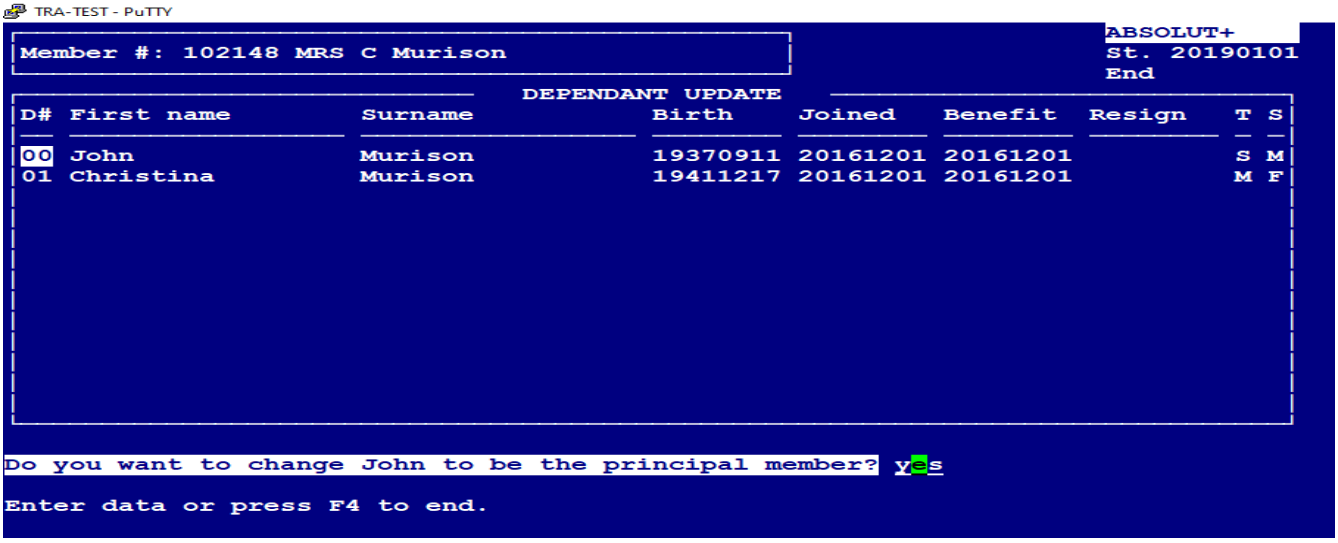
- After you are logged in and you are on the Main Screen, select MIU.
- Enter the Policy Number to access the information of the Policyholder.



- Select D to access the Dependant Screen.



- Stand on the Dependant you need to change.
- Change their status to Main Member by selecting M to make the Dependant the main Policyholder.



- The system will ask you to confirm that the Dependant must be changed to the Principal Member.

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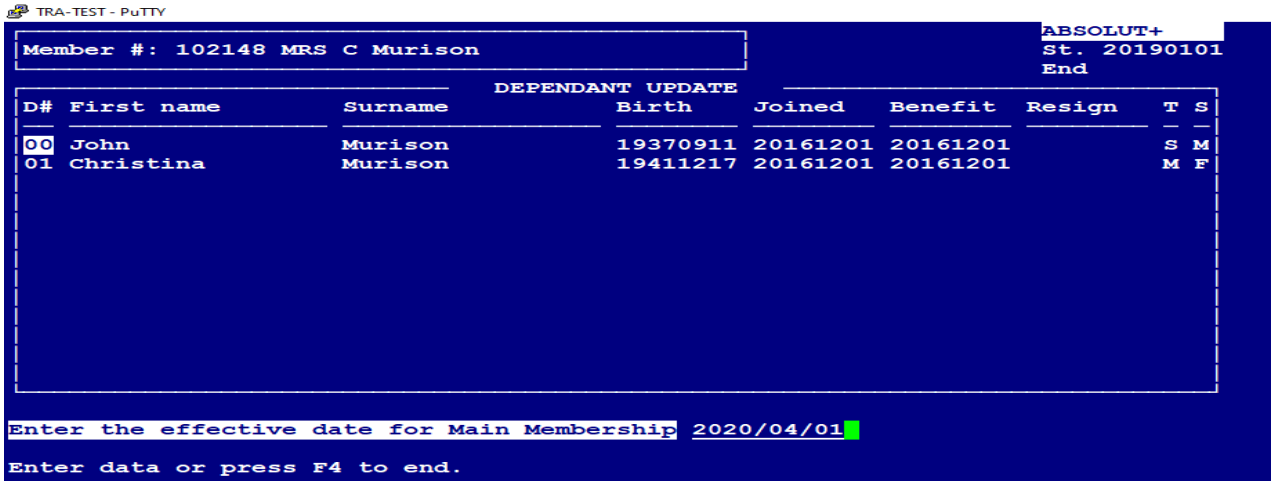
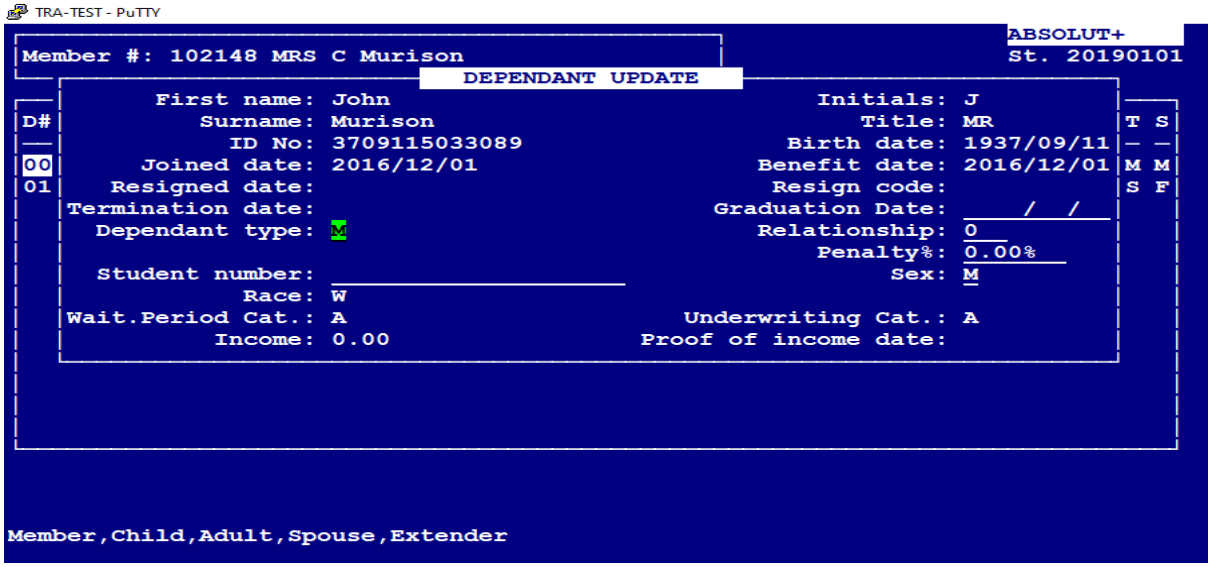
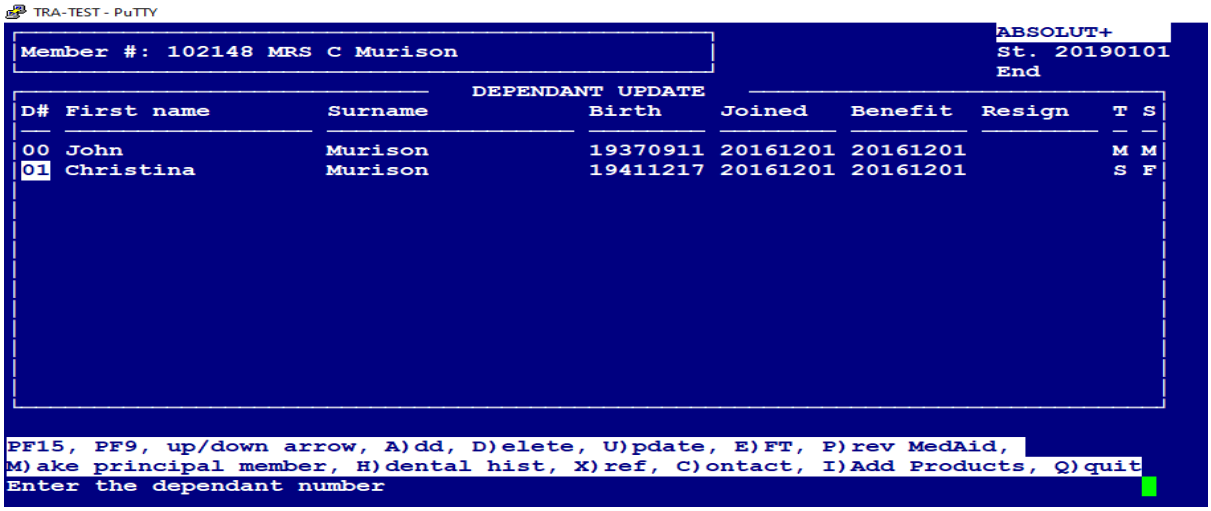


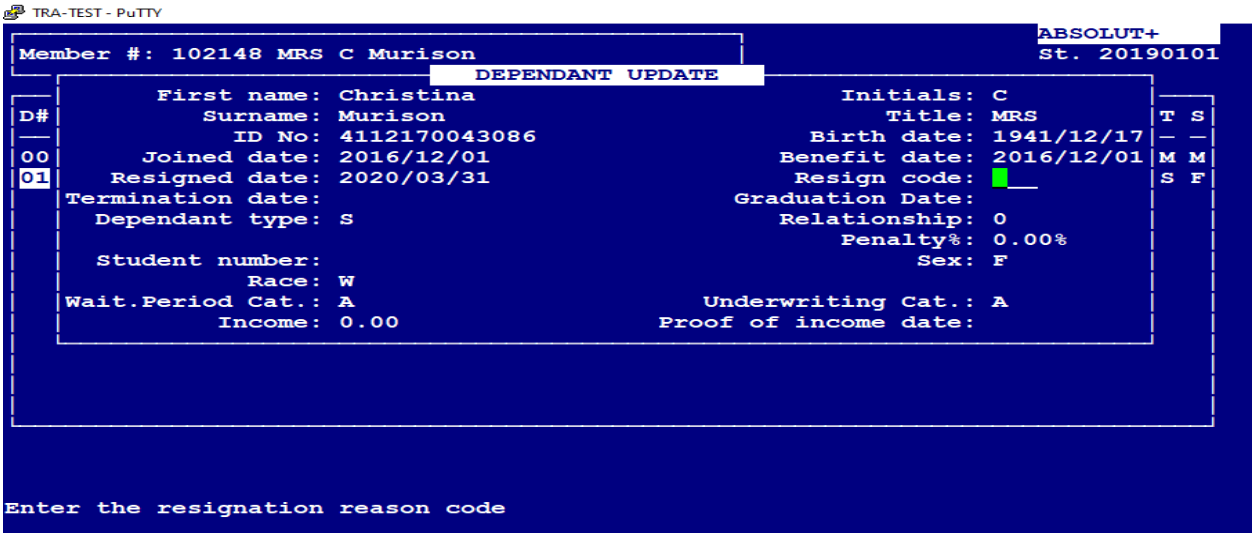
- Enter the date as from when the Dependant will become the Principal Member.



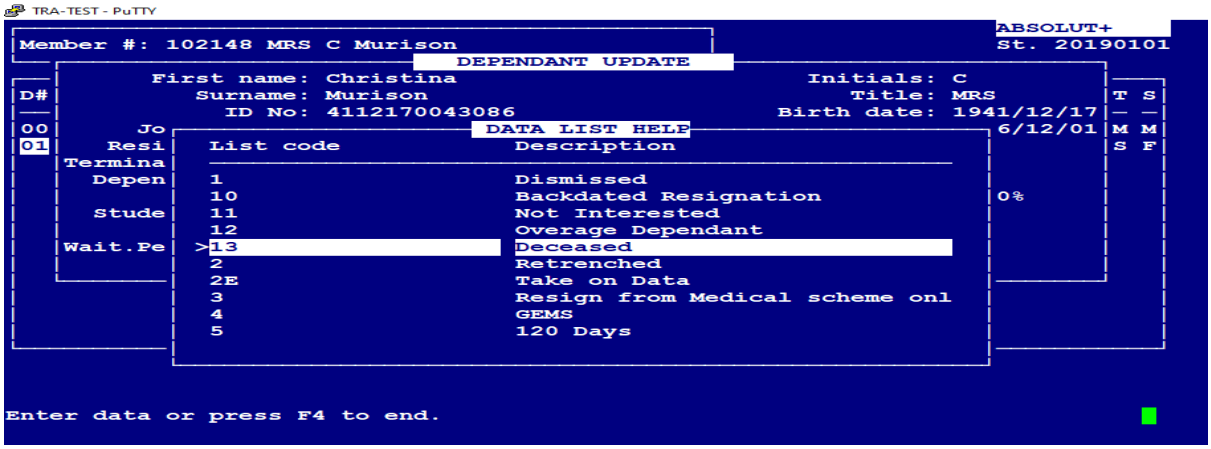
- Go into the new Principal Member to update all the details.



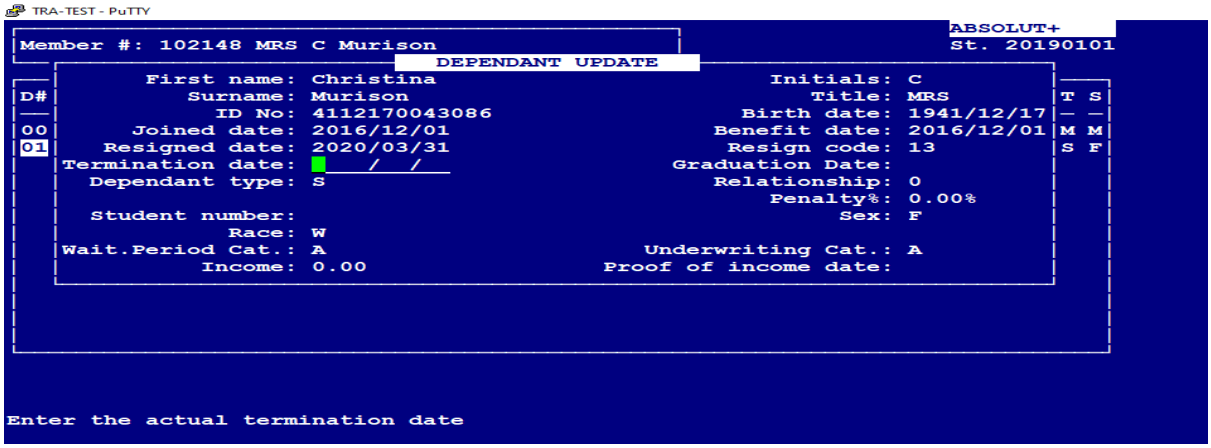
- Access the previous Principal Member that passed away.



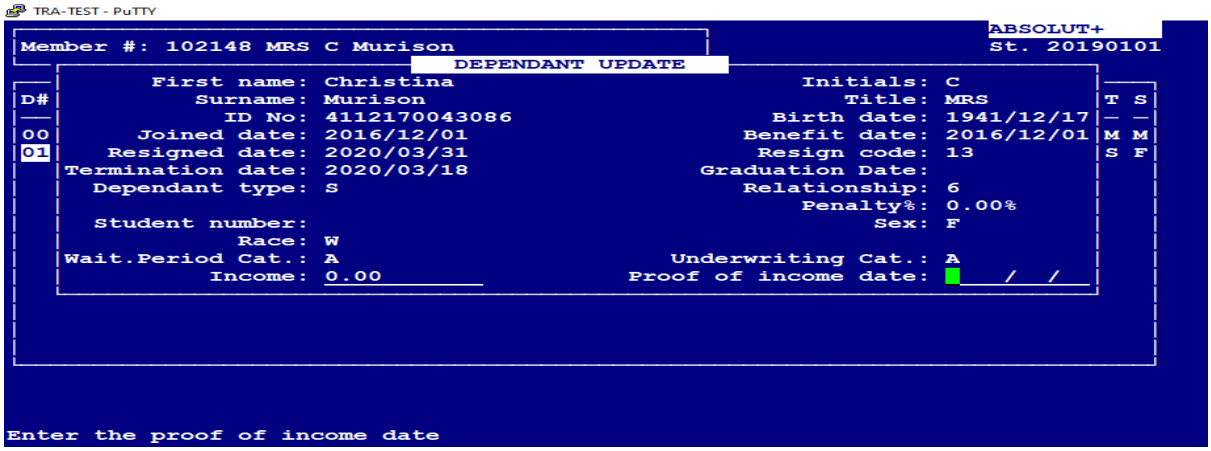
- Enter the reason code as to why the Principal member is changing.



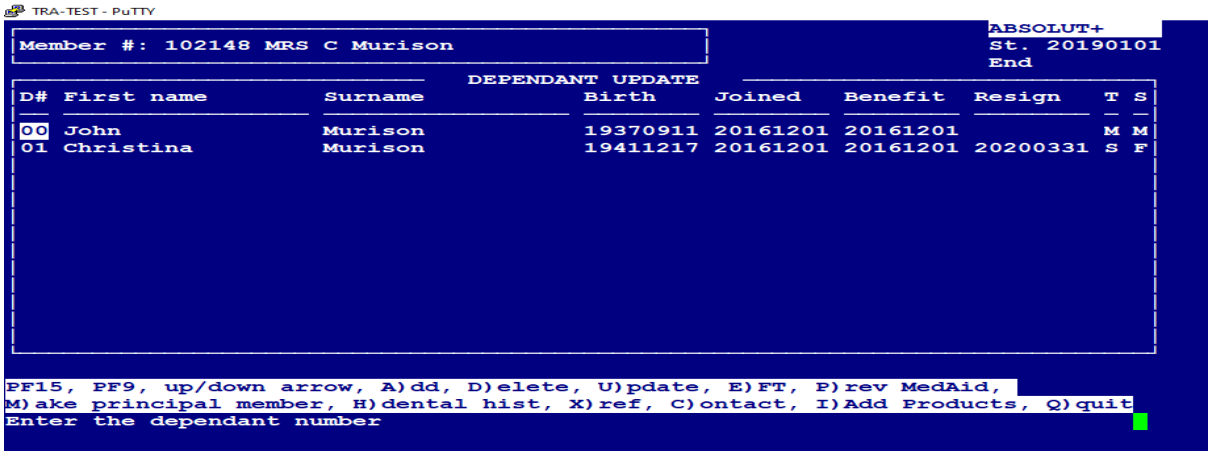
- Enter the reason code for deceased.



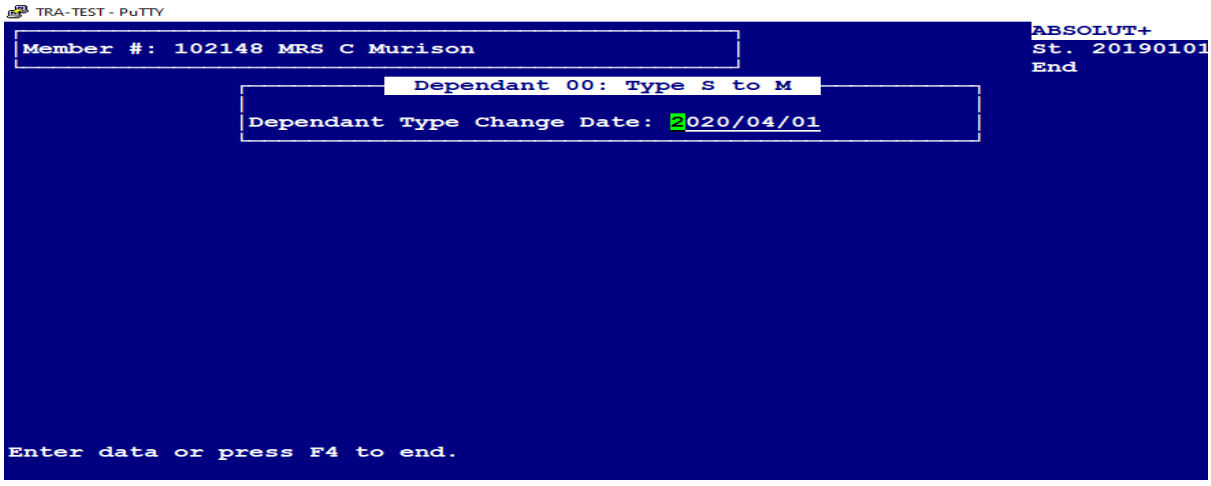
- As soon as the reason code is deceased, the system will take you to the resignation date.



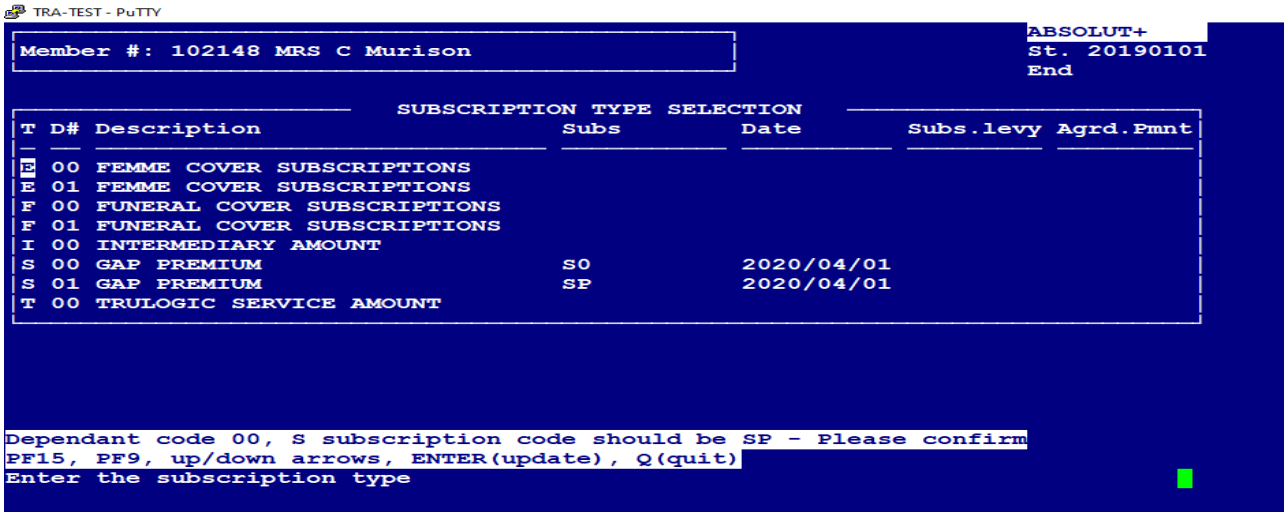
- The resignation date will always be the date that the Principal member passed away.



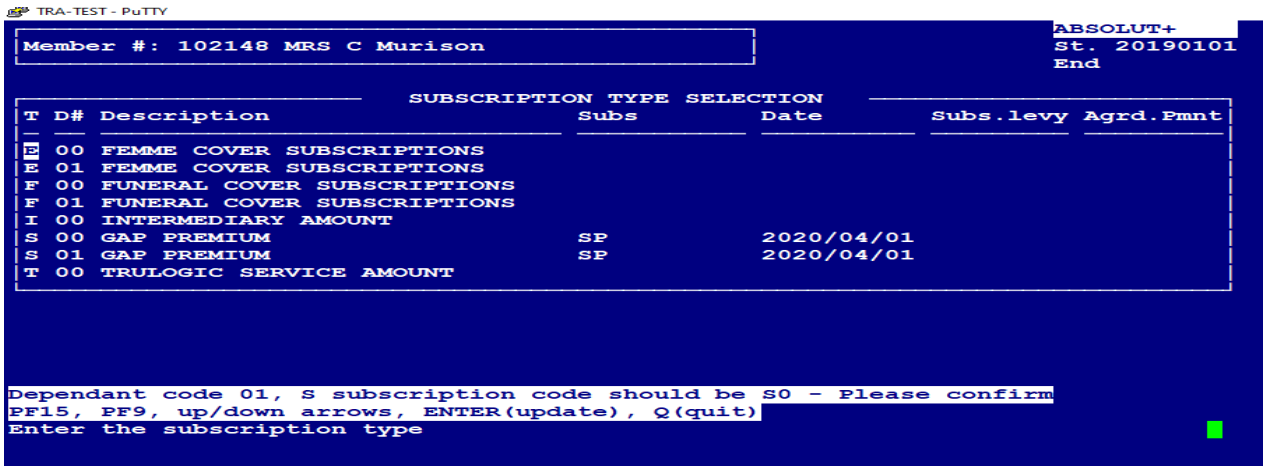
- After completing the process, press Q to Quit.



- The system will request the effective date.



- The system will direct to a screen where you need to confirm the subscriptions for the member that was updated.



- Once the date is confirmed, the system will automatically fill the subscription code for you.
- Enter

- The system will request if the claims for the resigned member should be reversed if claimed after the resigned date.
- Yes
- Process is now complete.
- Quit
- Back to the Main Screen

The process has been completed.

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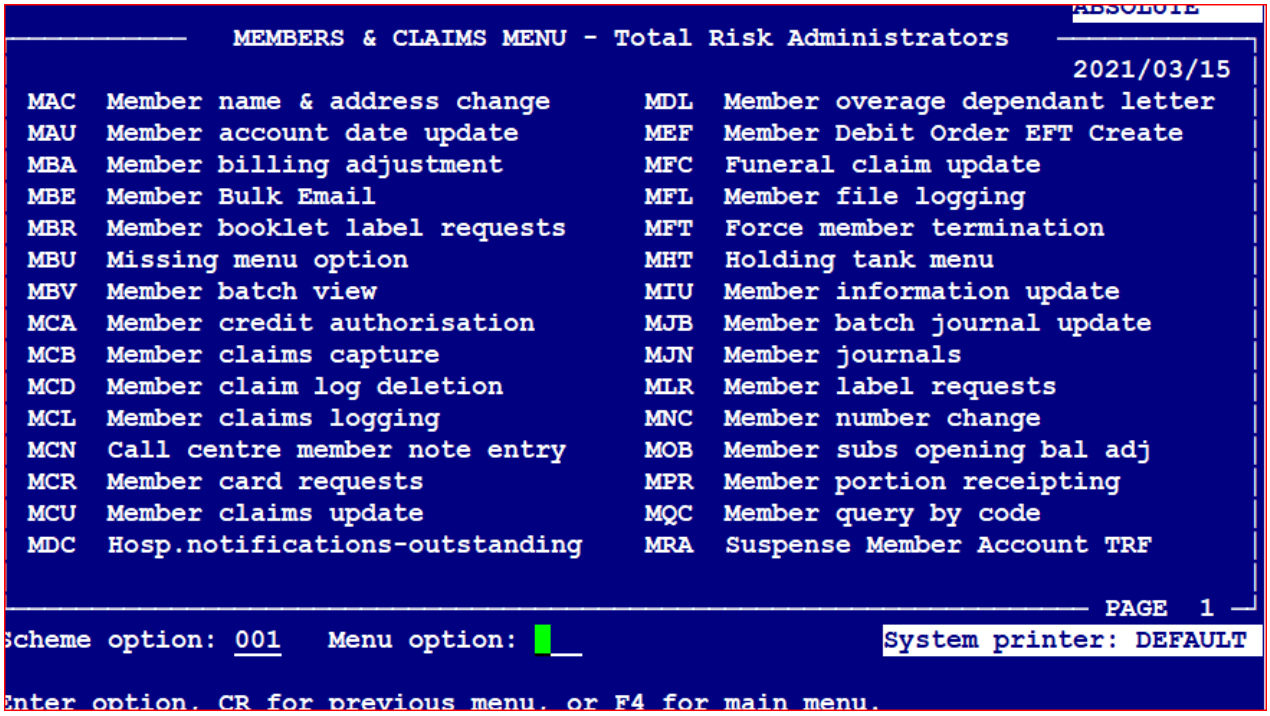
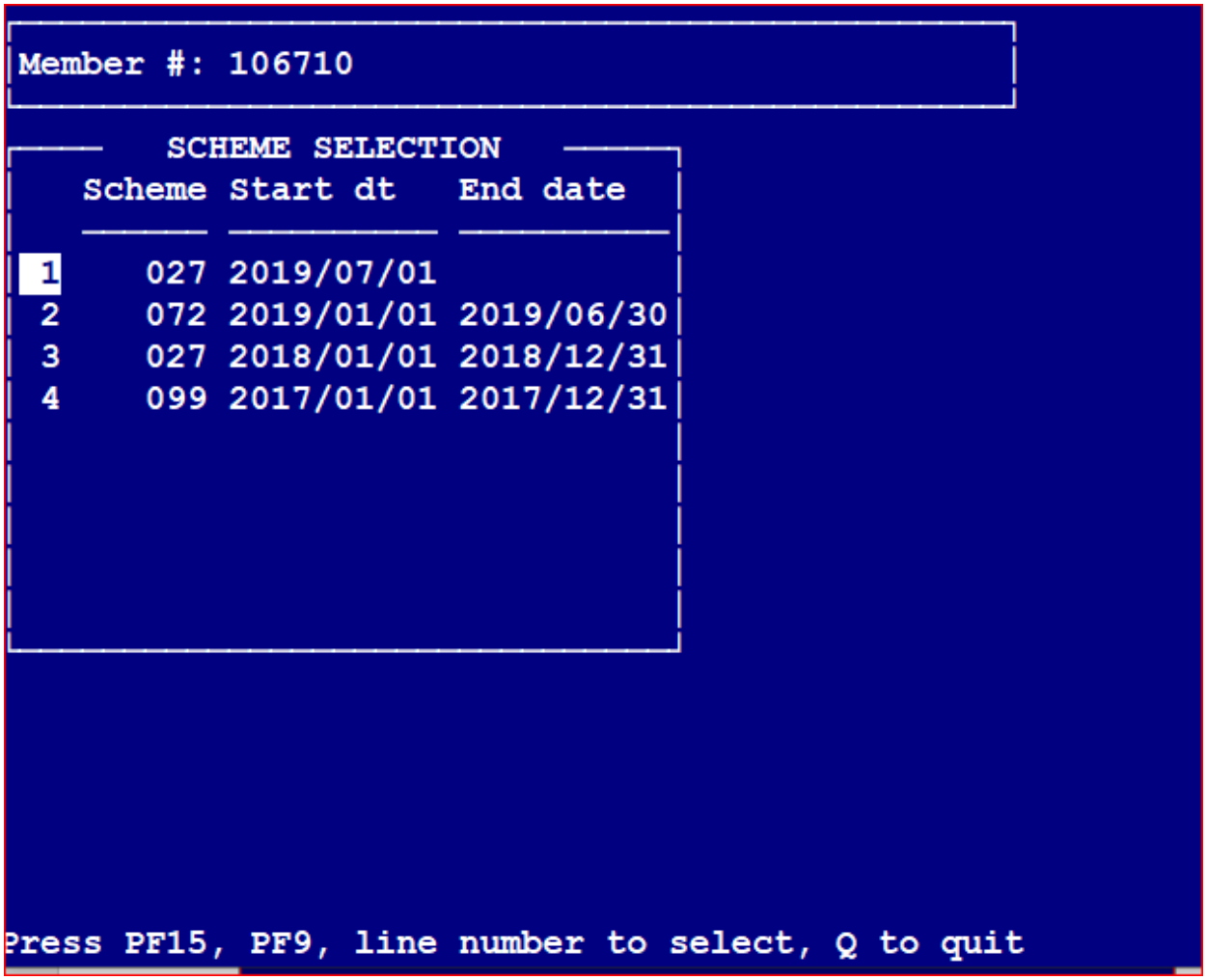
HOW TO UPGRADE OR DOWNGRADE A POLICY (PUTTY):

- Go into the Putty Program.
- The system will request your Username and Password.
- Once you have completed the login process, you are now in the Main Menu.

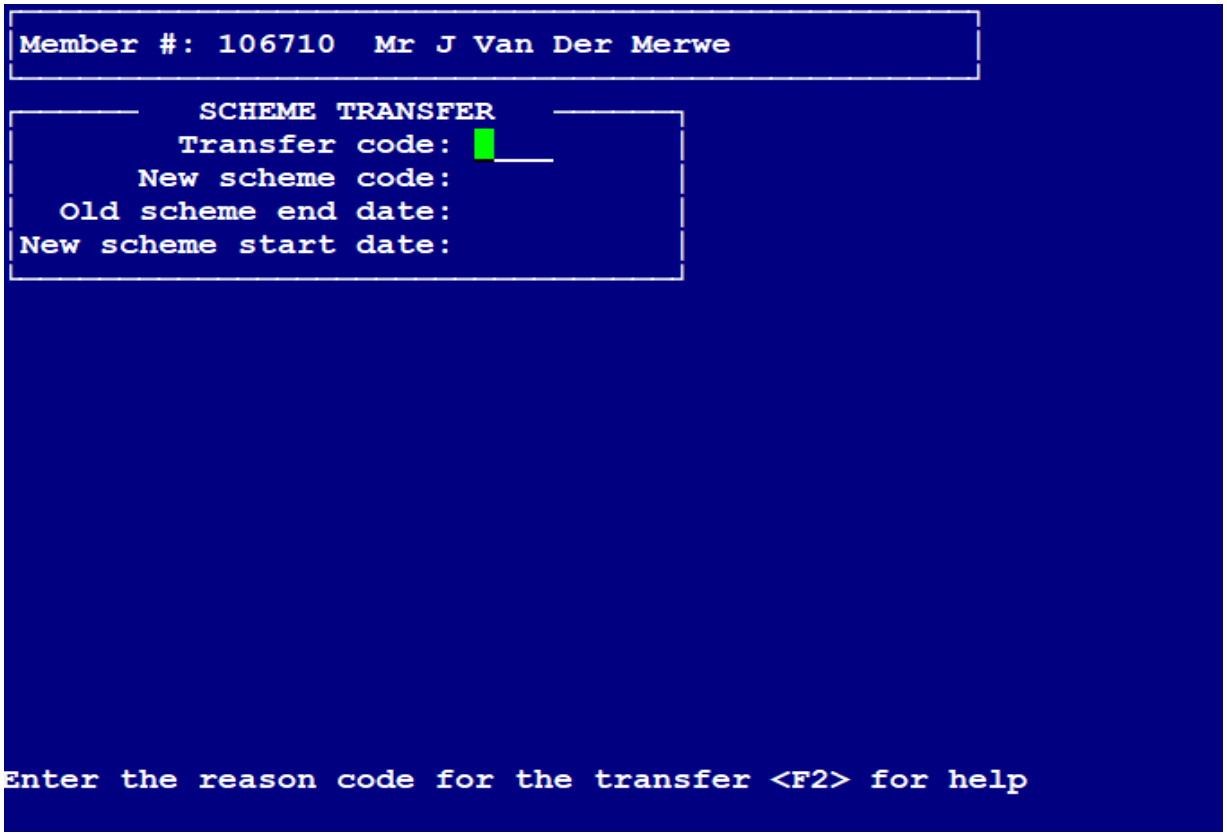


- From this screen you can select what you need to action.
- Different functions are accessed from this screen.
- You will access the member's profile under "MIU".

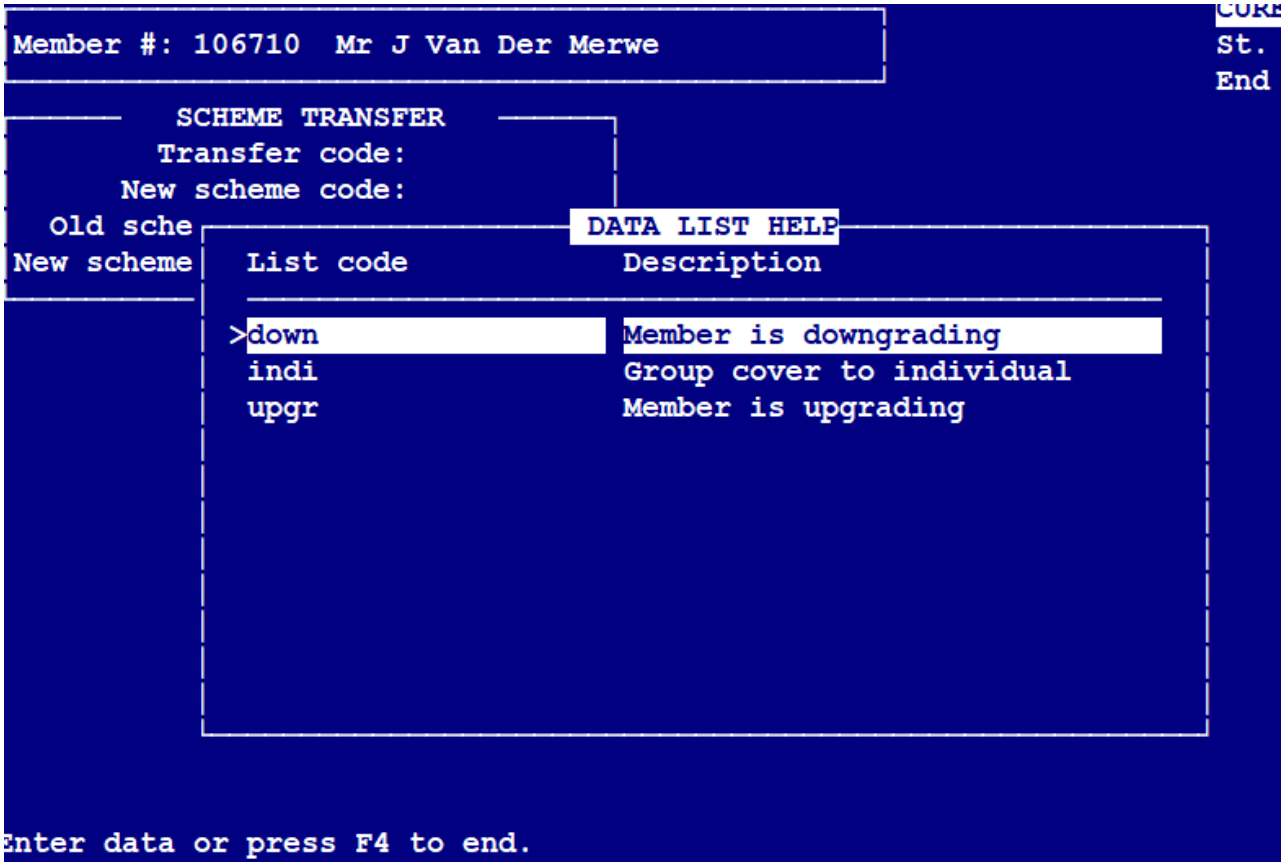


- You will access the member's profile under "MIU". Select number 1 as this is the Policy the Policholder is currently active on.

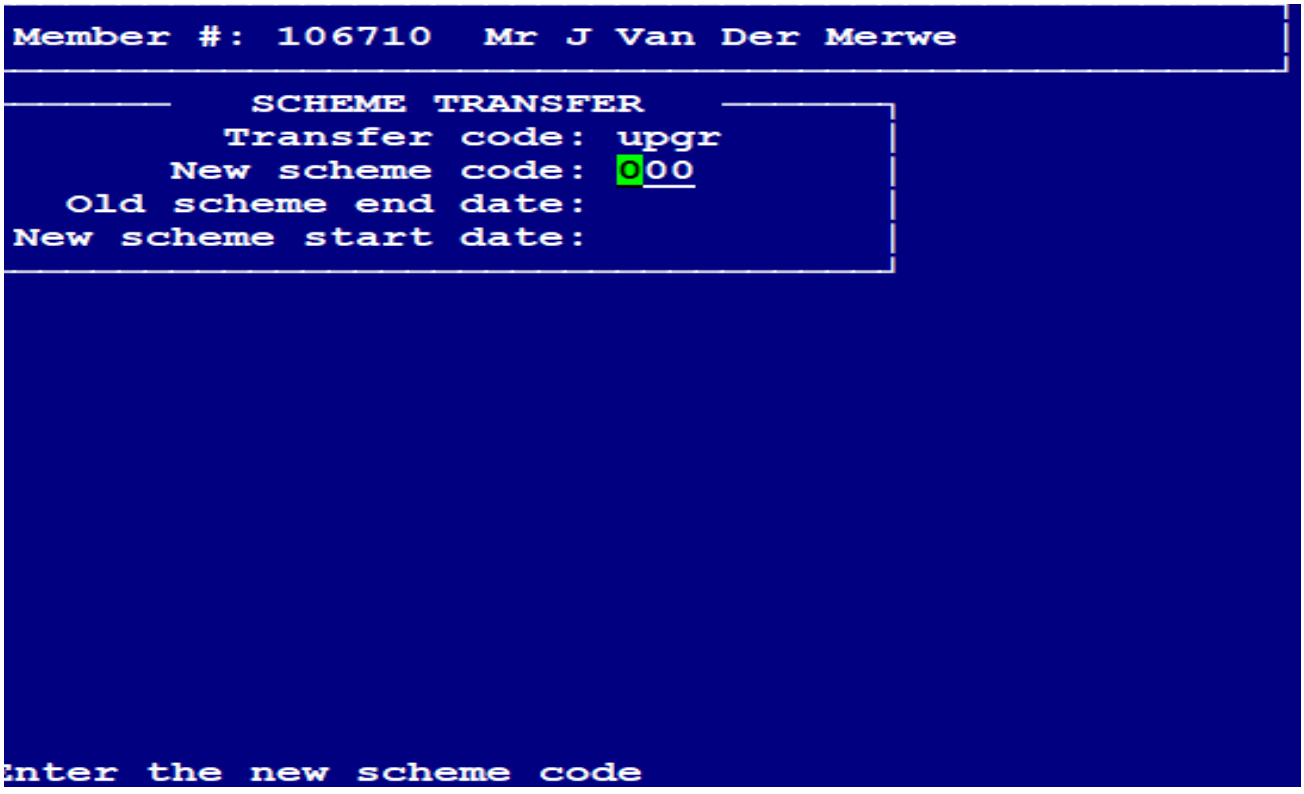
- As soon as you have entered the Policyholder's active record, the screen with the different options that can be updated will open.
- Select T for Transfer and press Enter.



- Enter F2 on the screen to select the transfer code.

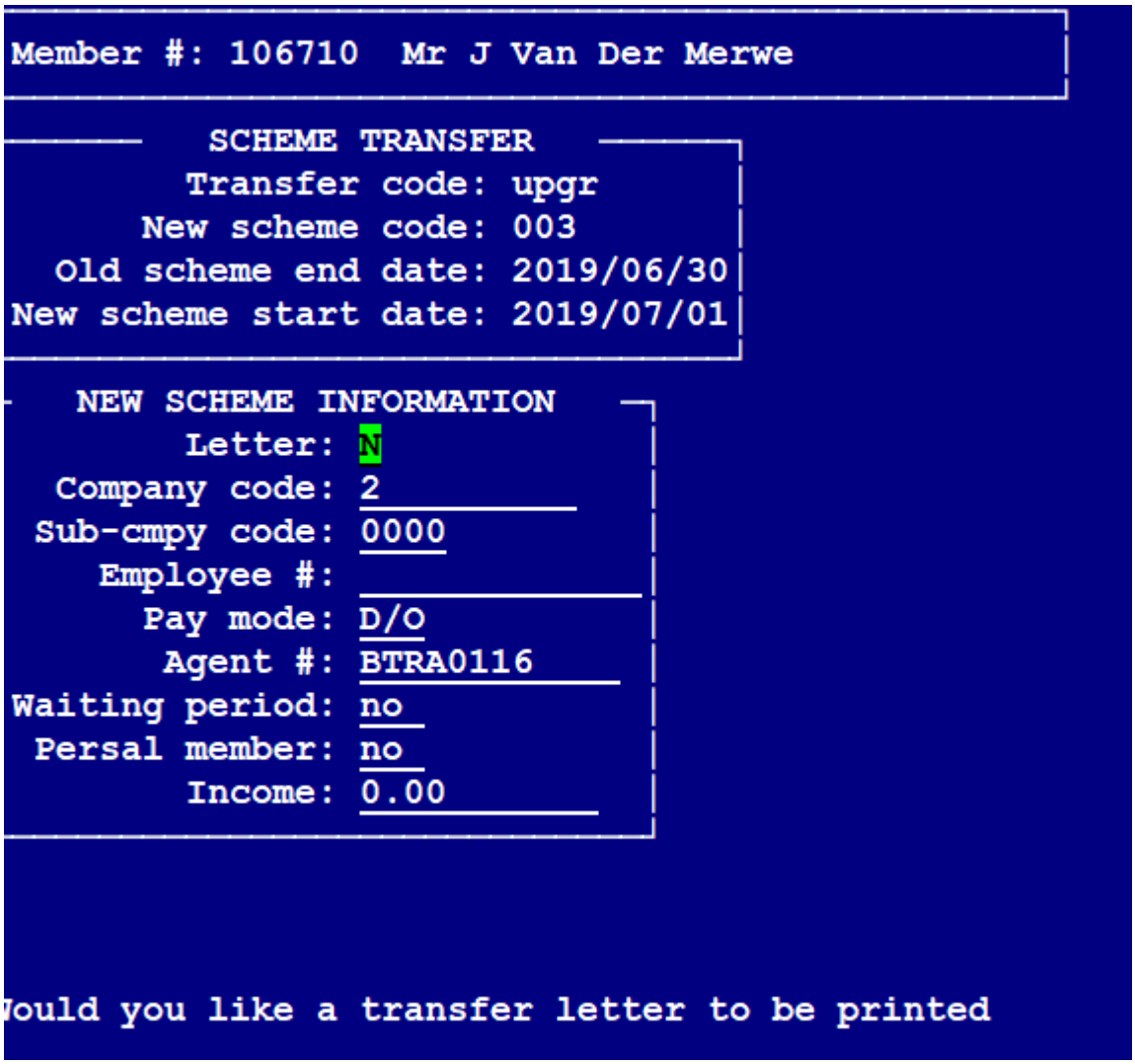


- Select the option that is relevant and Enter.



- Enter the Scheme Code of the Option that the Policyholder is upgrading to.

- The old Option will end at the end of the current/selected month and the new Option starts on the 1st of the next month.



- As soon as the details are completed, the above screen will appear.
- Select "Y" on the letter so that a new Policy Document can be created.
- Check the update form to ensure that the Broker has not changed.
- If the Broker is changing as well, change the Agent code to the new Broker.
- If all details remain the same, press Enter until you are asked to press the space bar.
- This then completes the upgrade process.

END