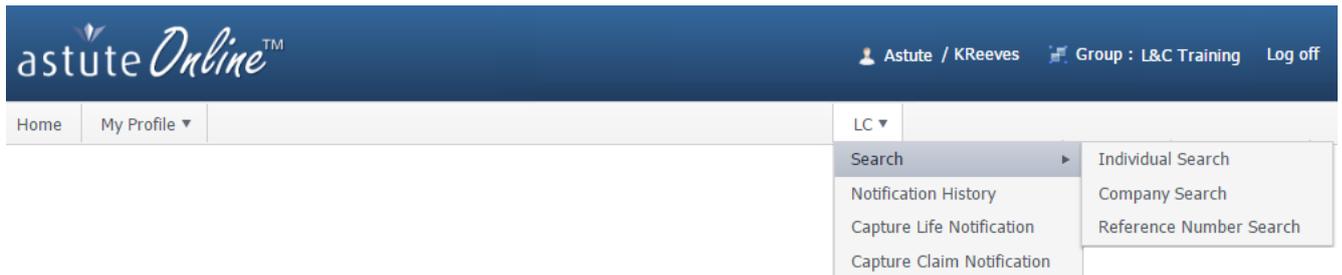


# 1 Search

Each User has access to the Search function, namely:

- **Individual** – search by *Name and Surname* or *ID Type and ID Number*
- **Company** – search by *Trading Name*
- **Reference Number** – search either the Policy Number, Claim Number or Internal Reference Number

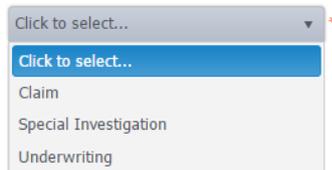


Every time a search (or enquiry) is done on an Individual, an enquiry history is generated.

In all instances, the **reasons for conducting an enquiry** remain the same, namely:

#### Search Criteria

Enquiry Reason



- check if the individual has claimed before (*processed claims*)
- if there is a special investigation done on the individual (*i.e. a fraudulent claim*)
- the individual applied for cover (*Underwriting*)

#### Note the following:

- A maximum of 50 records will be returned for any given search. Where more than 50 records were found, the User will receive a message requesting them to narrow the search.
- Search results are in alphabetical order.
- Type the first three (3) characters of a word to return partial matches.
- If the User searches for a notification captured by their Life Office, s/he has the option to edit, delete or view the information captured.
- If the User searches for a notification not captured by their Life Office, s/he can only view the information captured.
- If you **only capture the minimum compulsory fields**, the search results will be **the entire list** of notifications for the Enquiry Reason and ID Type selected
- Click on the *Clear Screen* tab to remain on the same screen and capture new or refined information



## 1.1 Individual Search

The reasons for enquiry remain the same, namely:

- Claim
- Special Investigation
- Underwriting

Completing the two compulsory fields only, will result in viewing the entire list of notifications, for the Enquiry Reason and ID Type selected

Please note: Id Number and Id type is required or Surname and Forename1

Clear Screen Search

### 1.1.1 Search by Username and Forename

- **Select** a reason for enquiry  
Type in the Life Assured's full name(s) and Surname > *Search*. If no results are returned, follow the alternative methods as shown below.
- **Type** in the **first 3 letters of the surname** and the **first initial** (or the full name) in the relevant fields.
- **Click** the *Search* button to view results.

Type in either the first 3 letters of the surname or type it out in full

Use the first initial or full name(s)

Click on the Search button to view results

Please note: Id Number and Id type is required or Surname and Forename1

Clear Screen Search



The results may return more than one result because of partial matches.

All notifications that match your search criteria will appear

Search Results Clear S

Title	Surname	Forename	Id Number	Date Of Birth	Address	Gender	Life Office	Member Number	Reference Number	Notification Type	Role Type	Entry Date	
Mr	SOARES	JOSE	5409175148186	17 Sep 1954		Male	LIBERTY LIFE:LIBERTY LIFE	59936685800	1JUH0	Life	Life Assured	20 Sep 2013	
Mr	SOARES	JONATHAN	8103225068083	22 Mar 1981		Male	LIBERTY LIFE:LIBERTY LIFE	59528372200	244DA	Life	Life Assured	22 Mar 2016	
Mr	SOARES	JONATHAN	8103225068083	22 Mar 1981		Male	LIBERTY LIFE:LIBERTY LIFE	59528372200	244W0	Life	Life Assured	23 Mar 2016	
Mr	SOAMES	Jonathan C	6111025199083	02 Nov 1961		Male	DISCOVERY LIFE	5130636145	1SVSF	Life			

Controls may differ, depending on access rights

To refine the results, include the Date of Birth in your search

10 items per page 1 - 10 of 21 items

To refine the result, add the Life Assured's date of birth to the search criteria and click on the Search button to view results

Search Criteria

Enquiry Reason: Special Investigation

Surname: Soa Forename1: Joline

Date of Birth Start: 1974/01/01

Please note: Id Number and Id type is required or Surname and Forename1

Type in the full name to refine further

Include the DOB to refine the search

Clear Screen Search

Details of the Life Assured's notification should now be assessable. Use the controls to proceed to your next step.

Search Results Clear Screen Search

Title	Surname	Forename	Id Number	Date Of Birth	Address	Gender	Life Office	Member Number	Reference Number	Notification Type	Role Type	Entry Date	
Ms	Soap	Joline	7401010011055	01 Jan 1974		Female	Claims Department	AFSE54321	CLAIM-2017/03/24-1	Claim	Life Assured	24 Mar 2017	

10 items per page 1 - 1 of 1 items

- **Maintain.** You will be redirected to the first page of the wizard to edit/update the notification. If the update(s) are not submitted to the register, the notification will be saved to the User's Draft Notifications. This means the updated version will not be seen when searching in the register. No changes will be made to the Reference Number, however, the User that updated the notification can be seen under the *Notification Audit Trail Report*.
- **Delete.** The notification will be deleted from the central Life and Claims database
- **View.** Read the notification in its entirety on a 1-pager, as captured in the wizard. Every time a notification is read/viewed, the 'Enquiry History' for the individual is generated. You can download the notification and may be able to maintain the notification from this view as well.

### 1.1.2 Using the ID Number and ID Type

The ID Number and ID Type criteria should match exactly as it was captured on the notification, for results to be returned.

**Search Criteria**

Enquiry Reason	Click to select...		
Surname		Forename1	
<b>Id Number</b>	7401010011085	Forename2	
<b>Id Type</b>	SA Id Number	Forename3	
Date of Birth Start		Date of Birth End	

**Please note: Id Number and Id type is required or Surname and Forename1**

Clear Screen Search

*The ID Number and ID Type should match 100% to what was captured on the notification*

Where this is not the case, no results will be returned. Also, no results will return if there was no ID Number captured on the notification.

Astute Online only validates on South African ID Numbers.

**astute Online™** Invalid SA Id Number Format "7802030011055"

Home My Profile ▾

### Individual Search

**Search Criteria**

Enquiry Reason	Special Investigation		
Surname		Forename1	
<b>Id Number</b>	7802030011055	ime2	
<b>Id Type</b>	SA Id Number	ime3	
Date of Birth Start		Date of Birth End	

**Please note: Id Number and Id type is required or Surname and Forename1**

**Validation Check!**  
The ID Number captured does not meet the SA ID Number requirements

**1. Incorrect ID type selected**  
**2. System has a validation check for all SA ID Numbers**



## 1.2 Company Search

Home | My Profile ▾ | Training | LC ▾

Company Search

**Search Criteria**

Enquiry Reason: **Special Investigation** \* 2

Trading Name:  \* 2

Funeral Parlour Number:

Company Registration Number:

SMDC Number:

Telephone Number:

FSB Number:

Search ▾

- Individual Search 1
- Company Search** 1
- Reference Number Search

Notification History

Clear Screen | Search 3

*Select a reason for enquiry then type in the Company's name*

*Click here to view results*

- From the Homepage, click on the *Life and Claims Menu > Search > Company Search*
- Under the *Search Criteria*, **select a reason** for the enquiry from the drop-down list and **type in** the Company name and any other additional information you have on the company.
- **Click** on the **Search** button to view results

**Search Results**

Tel Number	Company Numb...	Hospital Number	Practice Name	Trading Na...	Adresse...	Life Office	Reference Numb...	Notification Type	Entry Date			
				astute		SA MUTUAL LIFE ASSOC.:OLD MUTUAL	1VDZ5	Life	05 Jun 2015			

10 items per page | 1 - 1 of 1 items

### 1.3 Reference Number Search

Home My Profile LC

Search Individual Search  
Notification History Company Search  
Capture Claim Notification Reference Number Search

Use either of these search criteria as the reference number

If you only capture the claim type, all notifications relating to that type will return

**Search Results**

Surname	Forename 1	ID Number	Date of Birth	Address	Life Office	Member Number	Reference Number	Notification Type	Entry Date			
Monk	Marcia	7802030011055	03 Feb 1978		Claims Department	AFSE54321	CLAIM-2017/03/24-2	Claim	24 Mar 2017	Maintain	Delete	View

10 items per page 1 - 1 of 1 items

- From the Homepage, click on the *Life and Claims Menu > Search > Reference Number Search*
- Under the *Search Criteria*, select a reason for the enquiry from the drop-down list and **type in** the Reference Number
- Click on the **Search** button to view results

#### Reference Number Search

**Search Criteria**

Enquiry Reason

Click to select...  
⚠ Enquiry Type is required  
Click to select...  
Claim  
Special Investigation  
Underwriting

1 Select a reason for conducting an Enquiry

Reference Number

CLAIM-2017/03/24-1

2 Use either the - Member Number or - Full Reference Number

3 Click on the Search button to view results

Clear Screen Search

Depending on your access level and security rights, you may be able to:

**Search Results**

Surname	Forename 1	ID Number	Date of Birth	Address	Life Office	Member Number	Reference Number	Notification Type	Entry Date			
Soap	Joline	7401010011055	01 Jan 1974		Claims Department	AFSE54321	CLAIM-2017/03/24-1	Claim	24 Mar 2017	Maintain	Delete	View

10 items per page 1 - 1 of 1 items

Make changes to the notification

Remove notification from the register

Read the notification