

# Old Mutual Retirement Fund Administration



## eClaims User Guide

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## 1. Introduction

We, at Old Mutual Retirement Fund Administration aim to provide an efficient and cost effective service to the Employer Administrators and the Members of the Scheme.

The eClaims functionality improves efficiency in the Benefit Payment process. 80% of the electronic claim form is pre-populated, using data that was submitted via the Payroll Web. This assists with reducing the number of unprocessed claims due to outstanding information.

### Advantages of the eClaim capability include:

- A simplified and secure claims process
- Added governance with regards to benefit submission - claims are initiated via the Payroll Web and the claim form is co-completed by the member thereby managing the risk of fraudulent claims.
- Greater efficiency during normal and potential bulk exits
- Reduced risk of information being entered incorrectly or incomplete, thereby causing service delays.
- A Greener process that eliminates unnecessary paperwork.

### 1.1 OBJECTIVE OF THE USER GUIDE

The objective of this guide is to assist with the on-line submission of benefit claim forms. The guide should be used in conjunction with the rules, policies and administration manual of the Scheme.

### 1.2 DOCUMENT HISTORY

Version	Date updated	Author	Approved by
1.0	15 June 2011	Amanda Schmidt	Take-on Team
1.1	25 August 2011	Amanda Schmidt	Take-on Team
1.2	25 November 2011	Amanda Schmidt	Take-on Team
1.3	27 March 2012	Amanda Schmidt	Take-on Team
1.4	17 August 2012	Amanda Schmidt	Take-on Team

### 1.3 SOFTWARE REQUIREMENT

Internet Explorer 7 or later. It is however advised that Internet Explorer 8 or later be used for optimal performance.

## 1.4 CONTACT DETAILS

### Payroll Support Services

#### For Payroll Web, Member Web and eClaims Web queries

Shared Number      0860 466 466 (South Africa only)  
                             +27 21 504 9438 (International)

Email address        [pss@oldmutual.com](mailto:pss@oldmutual.com)

Operating hours      Mon – Fri 08h00 –17h00

### Old Mutual Retirement Fund Administration Service Centre

#### For General Member enquiries/scheme information

Telephone number **Mosaic clients**  
                             0860 455 455 (South Africa only);  
                             +27 21 503 1727 (International)

**SuperFund clients**  
0860 20 30 40 (South Africa only);  
+27 21 509 1006 (International)

Email address        [rfamembers@oldmutual.com](mailto:rfamembers@oldmutual.com)

Operating hours      Mon – Fri 08h00 – 17h00

### Self Service Support Centre

#### Online registration / password support

Telephone number 0860 60 6500 (South Africa only)  
                             +27 21 503 1710 (International)

Email address        [help-secure@oldmutual.com](mailto:help-secure@oldmutual.com)

Operating hours      Mon – Fri 08h00 – 17h00

## 2. eClaims process

### 2.1 PROCESS AND ACTIVITIES

The eClaims Servicer will be required to submit **Withdrawal, Retiral** and **Death** Claim forms as well as supporting documentation via the web enabled eClaims application.

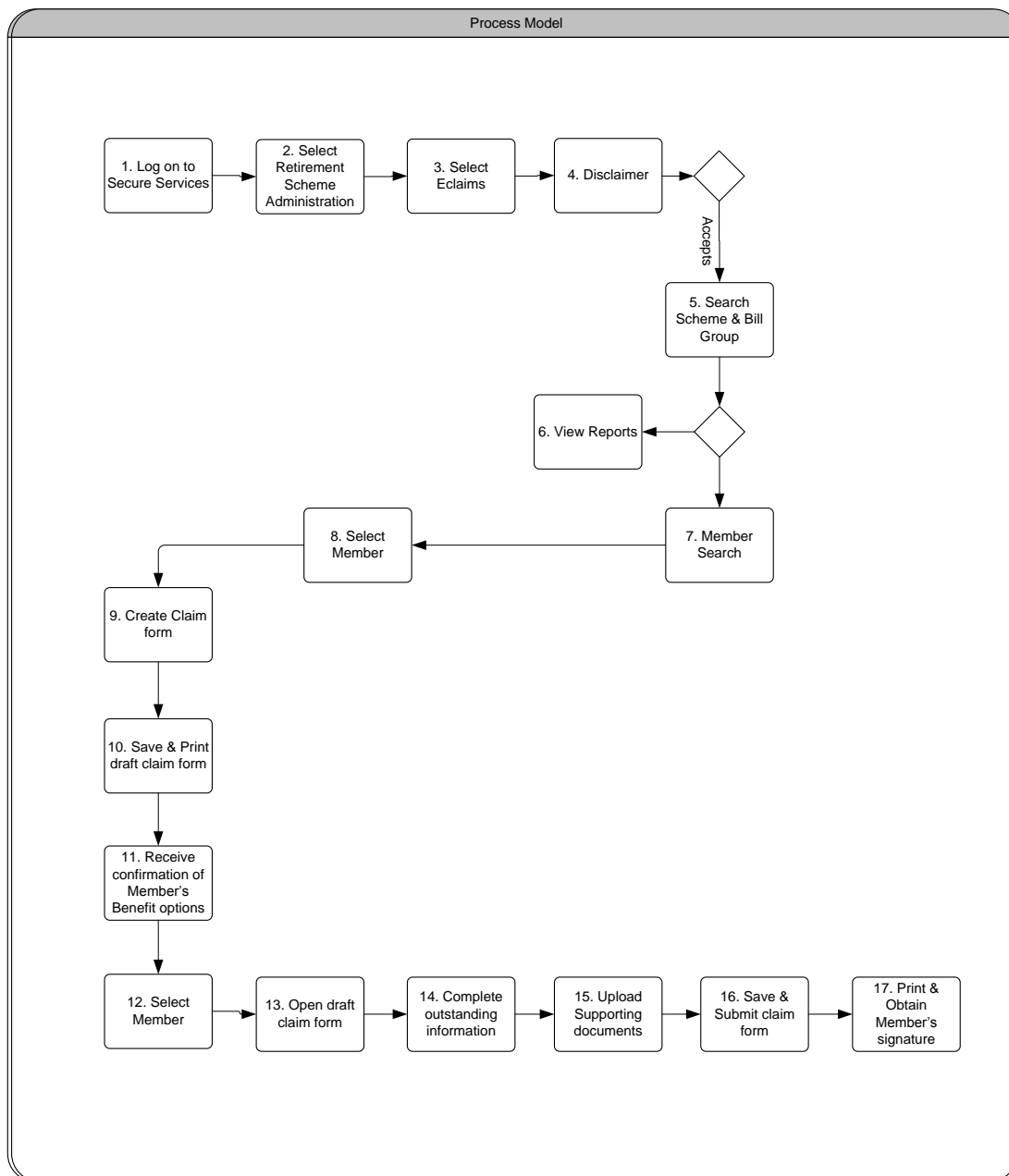
The current process remains unchanged for **Disability Claims**, i.e. paper claim forms must be submitted to Old Mutual.

It is important to note that a claim will only be initiated when it is submitted with the monthly data update process via the Payroll Web. This will trigger the claim process on Old Mutual's administration system. If a claim is submitted via eClaims prior to submitting it via the Payroll Web, it will remain in a pending status with Old Mutual. The claim will only be processed by Old Mutual once it has been submitted via the Payroll Web.

The eClaims activities are:

- After the monthly data update has been authorised on the Payroll Web, create a claim on the eClaims application
- Print the draft claim form
- Inform the member of his/her options in terms of the rules of the fund.
- The member must verify the detail already captured, complete all outstanding detail and return the form to their HR department
- Capture the member's benefit option and all other outstanding information on eClaims
- Load the required supporting documents
- Save and submit the claim via the eClaims application
- Print the completed form
- A copy of the required claim documentation, signed by the member, must be kept in the member's personnel file for audit purposes.

## 2.2 eCLAIMS PROCESS SUMMARY



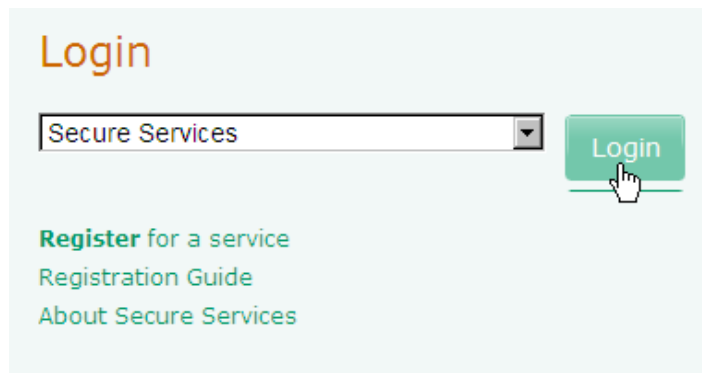
## 3. Accessing the system

### 3.1 LOGIN

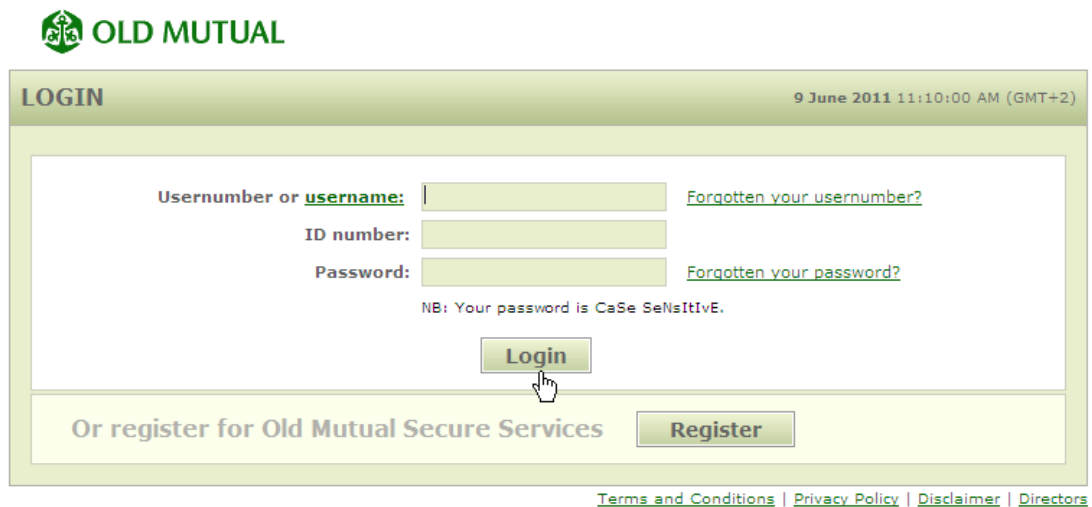
- Go to <http://www.oldmutual.co.za>



- Click on **Login**

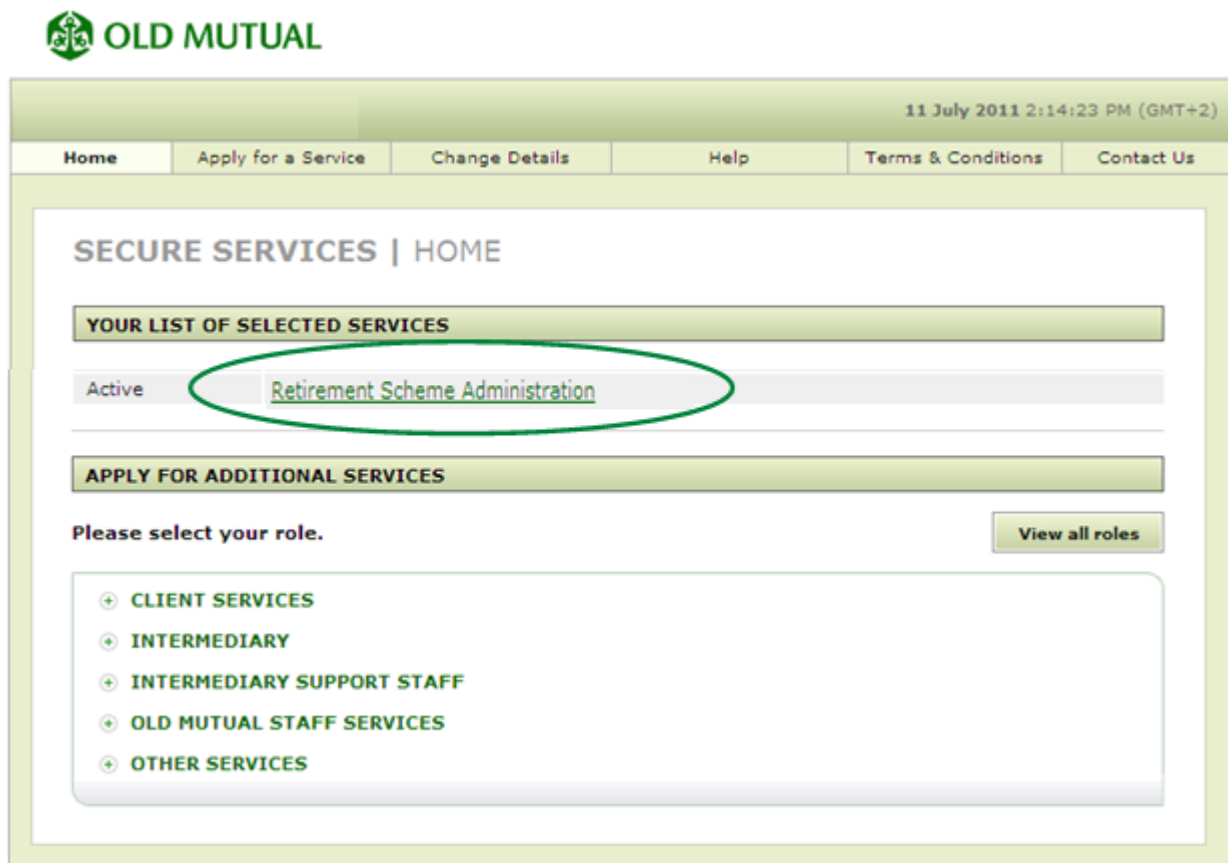


- On the Login screen, click on **Login**



- Enter your Usernumber or Username received during registration, ID Number and Password and click on Login

### 3.2 SELECT THE APPLICABLE SERVICE



11 July 2011 2:14:23 PM (GMT+2)

Home Apply for a Service Change Details Help Terms & Conditions Contact Us

SECURE SERVICES | HOME

YOUR LIST OF SELECTED SERVICES

Active	<a href="#">Retirement Scheme Administration</a>
--------	--

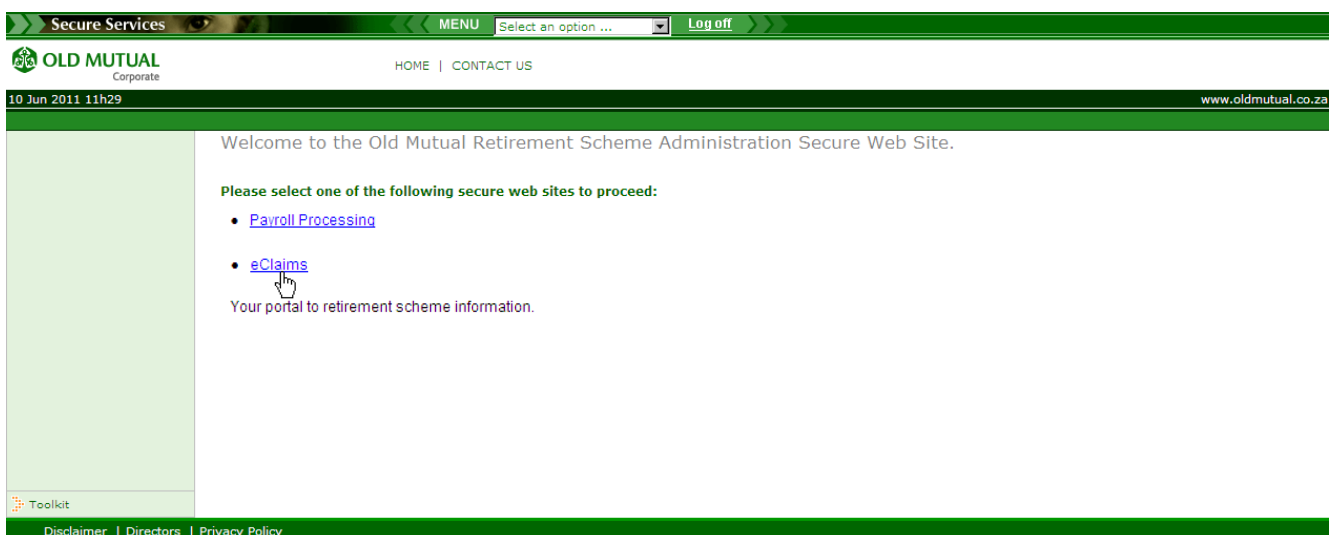
APPLY FOR ADDITIONAL SERVICES

Please select your role. [View all roles](#)

- + CLIENT SERVICES
- + INTERMEDIARY
- + INTERMEDIARY SUPPORT STAFF
- + OLD MUTUAL STAFF SERVICES
- + OTHER SERVICES

- Select **Retirement Scheme Administration**

### 3.3 SELECT THE APPLICABLE ROLE



Secure Services MENU Select an option ... Log off

OLD MUTUAL Corporate HOME | CONTACT US

10 Jun 2011 11h29 www.oldmutual.co.za

Welcome to the Old Mutual Retirement Scheme Administration Secure Web Site.

Please select one of the following secure web sites to proceed:

- [Payroll Processing](#)
- [eClaims](#)

Your portal to retirement scheme information.

Toolkit

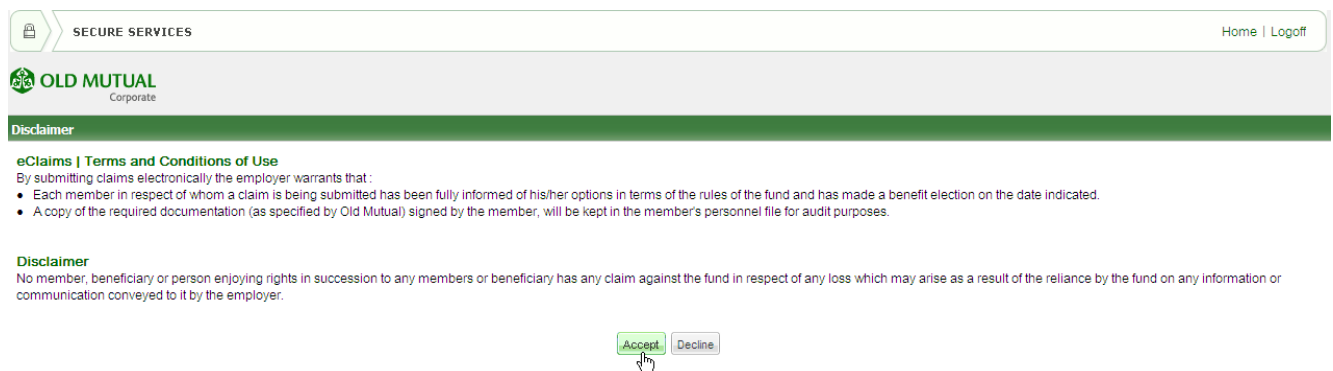
Disclaimer | Directors | Privacy Policy

- Click on **eClaims** to submit online benefit claim forms.



## 4. eClaims application

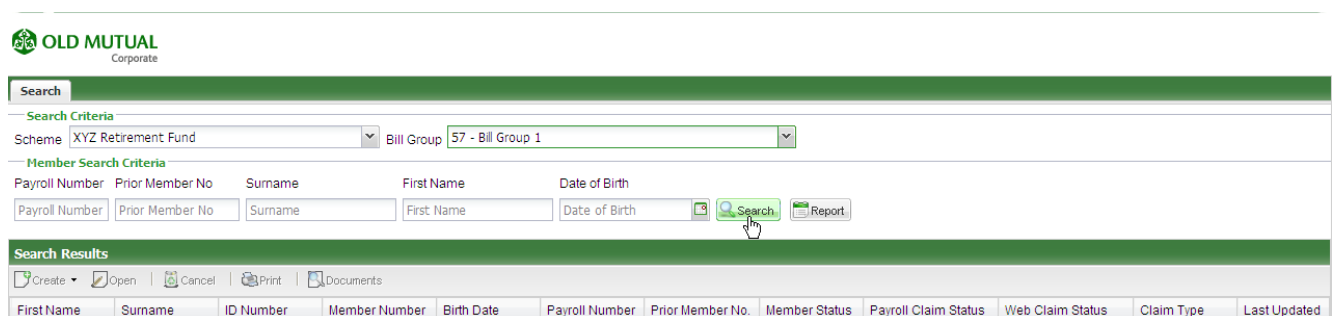
### 4.1 TERMS AND CONDITIONS OF USE



- Read and accept the Terms and Conditions of Use.
- Should you Decline, you will be directed back to the Retirement Scheme Administration Secure Web Site home page.

### 4.2 SEARCH FUNCTIONALITY

#### 4.2.1 Search all members on the Scheme and Bill Group selected



- Click on the dropdown arrow to select the scheme.
- If you have access to a number of schemes (more than 15), you must search for the scheme by typing in the scheme code or first few letters of the scheme name.
- Select the Bill Group.
- Please note that you will only have access to the Scheme and bill groups relevant to your responsibilities as per the Web Security Access form.
- To display a complete list of all the active members and members whose claims have not been finalised by Old Mutual on the selected bill group, click the **Search** button next to the date of birth.

Search

Search Criteria

Scheme XYZ Retirement Fund

Bill Group 57 - Bill Group 1

Member Search Criteria

Payroll Number

Prior Member No

Surname

First Name

Date of Birth

Payroll Number

Prior Member No

Surname

First Name

Date of Birth

Search

Report

Search Results

Create

Open

Cancel

Print

Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
B	Twilight	7204185057081	B154551B	19/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member				
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member		Draft	Withdrawal	15/08/2012 09:36
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member				

- Only members with the following **Member Status** will appear on this screen:
  - Active** – a member who has an active membership in the scheme
  - Temporary absence** – a member who is currently not contributing to the scheme.
  - Claim in Progress** – a member whose claim is being processed.
- Members whose claims have been finalised by Old Mutual will not appear on the search results screen.

## 4.2.2 Individual member search

There are a number of search criteria available, viz.

**Payroll Number:** The search will recognise information from the right hand side, i.e. if you type in 100, it will search for all Payroll numbers ending in 100.

**Prior Member Number:** The search will recognise information from the right hand side, i.e. if you type in 100, it will search for all Prior member numbers ending in 100.

**Last Name:** The search will recognise information from the left hand side. If you type in Mar, it will search for all surnames starting with Mar.

**First Name:** The search will recognise information from the left hand side. If you type in Chr, it will search for all first names starting with Chr.

**Date of Birth:** Type in the date of birth in the format: DD/MM/CCYY. If it is not in this format, you will receive an error message, indicating the correct format. Alternatively the date may be entered via the calendar.

Search

Search Criteria

Scheme XYZ Retirement Fund

Bill Group 57 - Bill Group 1

Member Search Criteria

Payroll Number

Prior Member No

Surname

First Name

Date of Birth

Payroll Number

Prior Member No

Fun

First Name

Date of Birth

Search

Report

- Complete one or more of the search criteria and click on the **Search** button.

## 4.3 SEARCH RESULTS

### 4.3.1 Sorting

**OLD MUTUAL**  
Corporate

**Search**

Search Criteria  
Scheme: XYZ Retirement Fund Bill Group: 57 - Bill Group 1

Member Search Criteria  
Payroll Number: Prior Member No: Surname: First Name: Date of Birth:

Payroll Number: Prior Member No: Surname: First Name: Date of Birth: Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
N	Now	Sort Ascending	550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
B	Twilight	Sort Descending	551B	18/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31
R	Funny	Columns	553B	06/06/1978	768768	67776	Active Member				
L	Jumpy		554B	11/10/1983	454654	8788	Active Member		Draft	Withdrawal	15/08/2012 09:36
R	Trying		7512245096083	24/12/1975	6656	6656	Active Member				

- Data can be sorted as per First Name, Last Name, etc. by clicking on the dropdown arrow on the header row and selecting to sort by Ascending or Descending order.

### 4.3.2 Displaying results

**OLD MUTUAL**  
Corporate

**Search**

Search Criteria  
Scheme: XYZ Retirement Fund Bill Group: 57 - Bill Group 1

Member Search Criteria  
Payroll Number: Prior Member No: Surname: First Name: Date of Birth:

Payroll Number: Prior Member No: Surname: First Name: Date of Birth: Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
N	Now	6011060019006	B154550B			78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
B	Twilight	7204185057081	B154551B			74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31
R	Funny	7806060013081	B154553B				Active Member				
L	Jumpy	8310115060084	B154554B				Active Member		Draft	Withdrawal	15/08/2012 09:36
R	Trying	7512245096083	B154555B	24/12/1975	6656		Active Member				

Columns: First Name, Surname, ID Number, Member Number, Birth Date, Payroll Number, Prior Member No., Member Status, Payroll Claim Status, Web Claim Status, Claim Type, Last Updated, User Name, User ID no.

- You can select which columns to be displayed by clicking on the dropdown arrow on the header row and selecting **Columns**. Columns can be selected and deselected by clicking on the column names.
- Double click on the Search tab below the Old Mutual Corporate logo to enlarge the search screen. Double click again to return to the original screen size.

### 4.3.3 Payroll Claim Status

**OLD MUTUAL**  
Corporate

**Search**

Search Criteria  
Scheme XYZ Retirement Fund Bill Group 57 - Bill Group 1

Member Search Criteria  
Payroll Number Prior Member No Surname First Name Date of Birth

Payroll Number Prior Member No Surname First Name Date of Birth Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member	Withdrawal	Draft	Withdrawal	20/08/2012 10:21
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member				
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member				
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31

- The Payroll Claim Status indicates whether a claim has been submitted via the Payroll Web and also what type of claim was submitted.
- If the claim has not been submitted via the Payroll Web, then this field will be blank.

### 4.3.4 Web Claim Status

**OLD MUTUAL**  
Corporate

**Search**

Search Criteria  
Scheme XYZ Retirement Fund Bill Group 57 - Bill Group 1

Member Search Criteria  
Payroll Number Prior Member No Surname First Name Date of Birth

Payroll Number Prior Member No Surname First Name Date of Birth Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member	Withdrawal	Draft	Withdrawal	20/08/2012 10:21
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member				
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member				
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31

- The Web Claim Status indicates whether a claim has been submitted via eClaims and the status of such claim.
- Once work on the Web Claim form has started, the status will change to Draft.
- In the Draft status the user is able to
  - Open the claim form again and continue to work on the form;
  - Cancel the claim;
  - Print the claim form;
  - Upload supporting documentation
- When the Web Claim form has been submitted, the status will change to Submitted
- In the Submitted status, the user is able to
  - Print the claim form;
  - Upload supporting documentation
  - Cancel the claim if there is no Payroll Claim Status for the member

## 4.4 SUBMITTING A CLAIM

### Step 1 Create a new Web claim

**OLD MUTUAL Corporate**

**Search**

Search Criteria  
 Scheme: XYZ Retirement Fund Bill Group: 57 - Bill Group 1

Member Search Criteria  
 Payroll Number: Prior Member No: Surname: First Name: Date of Birth:   
 Payroll Number: Prior Member No: funny First Name: Date of Birth: Search Report

**Search Results**

Create Open Cancel Print Documents

ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
7806065013081	B154553B	06/06/1978	768768	67776	Active Member				

Death Claim  
 Withdrawal Claim  
 Retirement Claim

- To submit a claim via eClaims, select the member, click on Create and select the type of claim.
- If a claim was submitted via the Payroll Process, then only the relevant claim type that was submitted via the Payroll Web will be highlighted.
- If no claim was submitted via the Payroll Process for a member, then all three claim types are available for selection.

**OLD MUTUAL Corporate**

**Withdrawal Benefit Claim Form**

Submit Save Print Close XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Exit Details**

Date of service termination: 31/08/2012  
 Final contribution month: 31/08/2012  
 Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
 Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
 Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:  
☒ Resignation  
☐ Voluntary Retrenchment  
☐ Involuntary Retrenchment  
☐ Dismissal  
☐ Abscondment

**Prior Claim**


Is any prior claim in terms of Section 37D of the Pension Funds Act payable?  
☐ Yes ☒ No  
 If "Yes", please complete and submit the Prior Claim form.

**Exit Details**  
 Offshore Services  
 Member Personal Details  
 Address Details  
 Court Orders  
 Pension Benefit Options  
 Provident Benefit Options  
 Payment Details  
 Add Documents  
 Validate

- The Exit Details section of the claim form will be displayed.
- All information that was submitted via the monthly data update process on the Payroll Web will be pre-populated on the claim form.
- Click on the links to open the various sections of the claim form.
- indicates that the section has been completed.
- indicates that there are outstanding information
- indicates that you haven't opened that particular section.

## Step 2 Print the claim form

The draft claim form must be printed and the member must complete all outstanding information and supply supporting documentation.



OLD MUTUAL  
Corporate

Search **Withdrawal Benefit Claim Form**

Submit Save Print Close

**Exit Details**

Date of service termination: 31/08/2012

Final contribution month: 31/08/2012

Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:

☒ Resignation  
☐ Voluntary Retrenchment  
☐ Involuntary Retrenchment  
☐ Dismissal  
☐ Abscondment

**Prior Claim**

Is any prior claim in terms of Section 37D of the Pension Funds Act payable? ☐ Yes ☒ No

If "Yes", please complete and submit the Prior Claim form.

Verify details already captured by your Employer and complete/correct all outstanding details and return forms to your HR department.

**WITHDRAWAL BACK TO BACK BENEFIT CLAIM FORM**

Scheme Name XYZ Retirement Fund

Member Name Ms. R Funny

Member No B154553B Employee No 768768

**Member's Details**

Title	Ms.	Surname	Funny
First Names	R	ID Number	7806065013081
Other ID No/Passport No		Country of Issue	
Date of Birth	06/06/1978	Employee Number	768768
Income Tax Number			

Where can Old Mutual contact you after leaving the company?

Contact telephone number Contact cellphone number

Contact Email Address

**Residential Address**

Unit Number	
Complex	
Street Number	
Street / Farm Name	
Suburb / District	
City	
Postal Code	

☐ Use Residential Address as the Postal Address

**Postal Address**

Address Line 1	
Address Line 2	
Address Line 3	
Address Line 4	
Postal Code	

17/08/2012 Page 1 of 5

- Click on **Print**.
- You have the option to open or save the document.
- The form will open as a .pdf document which you can print and save.
- Request the member to verify the detail and complete all outstanding detail.

**Note:** The claim form will automatically save when the print button is clicked.

### Step 3 Save the claim form

The user can at any stage save the claim form and continue to work on it at a later stage.

**OLD MUTUAL**  
Corporate

Search | Withdrawal Benefit Claim Form

Submit | Save | Print | Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Exit Details**

Date of service termination: 31/08/2012  
Final contribution month: 31/08/2012  
Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:

☒ Resign  
☐ Voluntary Retirement  
☐ Involuntary Retirement  
☐ Dismissal  
☐ Abscondment

**Close Confirmation**  
All changes will automatically be saved.  
Do you want to continue?  
Yes No

**Prior Claim**

Is any prior claim in terms of Section 37D of the Pension Funds Act payable?  
☐ Yes ☒ No

If "Yes", please complete and submit the Prior Claim form.

**Exit Details**  
Offshore Services  
Member Personal Details  
Address Details  
Court Orders  
Pension Benefit Options  
Provident Benefit Options  
Payment Details  
Add Documents  
Validate

- Click on **Save**.
- If you want to close the claim form, click on **Close**. All changes will automatically be saved.
- Click on **Yes** to continue.
- You will be taken back to the search result screen.

**OLD MUTUAL**  
Corporate

Search

**Search Criteria**

Scheme: XYZ Retirement Fund | Bill Group: 57 - Bill Group 1

**Member Search Criteria**

Payroll Number | Prior Member No | Surname | First Name | Date of Birth

Payroll Number | Prior Member No | funny | First Name | Date of Birth | Search | Report

**Search Results**

Create | Open | Cancel | Print | Documents

Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated	User Name	User ID no
B154553B	06/06/1978	768768	67776	Active Member		Draft	Withdrawal	17/08/2012 09:13:42 AM	S De Sani	7609295088083

- The member's Web Claim Status is now **Draft**.
- The User Name and ID number of the user who last updated the claim will be displayed.

## Step 4 Capture all outstanding information received from the member

**OLD MUTUAL**  
Corporate

**Search**

**Search Criteria**

Scheme: XYZ Retirement Fund Bill Group: 57 - Bill Group 1

**Member Search Criteria**

Payroll Number: Prior Member No: Surname: First Name: Date of Birth:

Payroll Number: Prior Member No: funny First Name: Date of Birth: Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member		Draft	Withdrawal	17/08/2012 09:13

- Search and select the member and click on **Open**
- Proceed to capture all information on the claim form

### A. Exit Details

**OLD MUTUAL**  
Corporate

**Withdrawal Benefit Claim Form**

Submit Save Print Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Exit Details**

Date of service termination: 31/08/2012

Final contribution month: DD/MM/YYYY

Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:

☒ Resignation

☐ Voluntary Retrenchment

☐ Involuntary Retrenchment

☐ Dismissal

☐ Abscondment

**Prior Claim**

Is any prior claim in terms of Section 37D of the Pension Funds Act payable? ☐ Yes ☒ No

If "Yes", please complete and submit the Prior Claim form.

**Exit Details**

Offshore Services

Member Personal Details

Address Details

Court Orders


Pension Benefit Options

Provident Benefit Options

Payment Details

Add Documents

Validate

- Mandatory fields will be highlighted in red if it is not completed. There is also a  sign next to the field. Hover the cursor over the sign to read the message.
- Date of service termination defaults to the termination date submitted via the Payroll Web. This date may be changed.
- Once you have completed a section of the claim form, you can select the next section by clicking on the links.



## B. Offshore Services

**OLD MUTUAL**  
Corporate

Search **Withdrawal Benefit Claim Form**

Submit Save Print Close XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Offshore Service**

Was any period of service outside of RSA during membership to this Fund? If "Yes", complete the table below and submit proof of offshore service: ☒ Yes ☐ No

Add Row Remove Row Confirm

Country	Period from	Period to
<div> <div></div> <div> Afghanistan  Albania  Algeria  American Samoa  Andorra  Angola  Anguilla  Antarctica  Antigua And Barbuda  Argentina  Armenia  Aruba  Australia  Austria  Azerbaijan </div> </div>		

Cancel Save

Please correct the following:  
Country: This field is required  
Period from: This field is required  
Period to: This field is required

Exit Details ✖

Offshore Services ✔

Member Personal Details ?

Address Details ?

Court Orders ?

Pension Benefit Options ?

Provident Benefit Options ?

Payment Details ?

Add Documents

Validate

- If the member has offshore service, click on **Add Row** to open the Country drop-down list.
- Choose the relevant country and insert the period.
- Click on **Save**

## C. Member Personal Details

**OLD MUTUAL**  
Corporate

Search **Withdrawal Benefit Claim Form**

Submit Save Print Close XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Member Personal Details**

Title: Ms.

Surname: Funny

First Names: R

Date of Birth: 06/06/1978

ID Number: 7806065013081

Other ID No/Passport No:

Country of Issue: Country of Issue

Income Tax Number: Income Tax Number

Employee Number: 768768

Contact Details - Where can Old Mutual contact you after leaving the company?

Email Address: Email Address

Cellphone Number: Cellphone Number

Home Telephone Number: Home Telephone Number

Exit Details ✖

Offshore Services ✖

Member Personal Details ✖

Address Details ?

Court Orders ?

Pension Benefit Options ?

Provident Benefit Options ?

Payment Details ?

Add Documents

Validate

- A check is done on the member's ID Number and Income Tax Numbers. If the ID number is not a valid RSA numbers or the Income Tax number is not a valid SA tax number, then the fields will be highlighted in red and have a sign.

## D. Address Detail

The screenshot shows the 'Address Details' section of the 'Withdrawal Benefit Claim Form'. The form is titled 'OLD MUTUAL Corporate'. The main header bar includes a search bar, the form title, and navigation links: Submit, Save, Print, and Close. The user information bar shows 'XYZ Retirement Fund | Ms. R Funny | B154553B | 768768'. The 'Address Details' section is divided into two parts: 'Residential Address' and 'Postal Address'. The 'Residential Address' section includes fields for Unit Number, Name of Complex, Street Number (15), Street Name/Farm Name (Test Street), Suburb/District (Pinelands), City/Town (Cape Town), and Postal Code (8000). A checkbox 'Use Residential Address as the Postal Address' is checked. The 'Postal Address' section includes fields for Address Line 1 through 4 and a Postal Code field, all of which are greyed out. On the right side, there is a vertical menu with links: Exit Details (red X), Offshore Services (red X), Member Personal Details (red X), Address Details (green checkmark), Court Orders (blue question mark), Pension Benefit Options (blue question mark), Provident Benefit Options (blue question mark), Payment Details (blue question mark), Add Documents, and Validate.

- If you indicate that the Residential Address must be used as the Postal Address, the Postal Address will be greyed out as there is no need to complete it.

## E. Court Orders

The screenshot shows the 'Court Orders' section of the 'Withdrawal Benefit Claim Form'. The form is titled 'OLD MUTUAL Corporate'. The main header bar includes a search bar, the form title, and navigation links: Submit, Save, Print, and Close. The user information bar shows 'XYZ Retirement Fund | Ms. R Funny | B154553B | 768768'. The 'Court Orders' section includes a question: 'Are there any divorce order(s) and/or maintenance court order(s) against the member's benefit?' with radio button options for 'Yes' (selected) and 'No'. On the right side, there is a vertical menu with links: Exit Details (red X), Offshore Services (red X), Member Personal Details (red X), Address Details (green checkmark), Court Orders (green checkmark), Pension Benefit Options (red X), Provident Benefit Options (blue question mark), Payment Details (blue question mark), Add Documents, and Validate.

- If there are divorce or maintenance court orders against the member's benefit, select **Yes**.
- Certified copies of the relevant court orders must be submitted. This can be done via the **Add Documents** link (see Step 6).

## F. Benefit Options

**OLD MUTUAL**  
Corporate

Search | **Withdrawal Benefit Claim Form**

Submit | Save | Print | Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Pension Fund**

**Benefit Options**

Please select one:

- ☐ Transfer full benefit to another approved fund
- ☒ Part cash / Part transfer to another approved fund
- ☐ Full benefit in cash

**Transfer Options**

Please select one or more:

- ☐ New Employer Pension Fund
- ☐ New Employer Provident Fund
- ☐ Pension Preservation Fund
- ☐ Retirement Annuity Fund

**Cash Details**

Please note: Any cash amount requested will be reduced by any tax payable on it.

Cash amount:

or

Cash percentage:

**Fund Details**

Full name of approved fund:

Contact name:

Exit Details ✖

Offshore Services ✖

Member Personal Details ✖

Address Details ✔

Court Orders ✔

**Pension Benefit Options ✖**

Provident Benefit Options ?

Payment Details ?

Add Documents

Validate

- When completing values (rand amount), only enter the amount. The currency symbol will not be accepted.
- When completing a Cash percentage, enter the percentage without the “%” sign.

## G. Payment Details

**OLD MUTUAL**  
Corporate

Search | **Withdrawal Benefit Claim Form**

Submit | Save | Print | Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Payment Details**

Indicate your preferred Method of Payment: ☒ Electronic Transfer ☐ Cheque

**Electronic Fund Transfer (Must be your own account)**

Name of Account Holder:

Name of Bank:

Name of Branch:

Account Number:

Bank Branch Code:

Type of Account:

Bank Account Country: ☒ RSA Account ☐ Non-RSA Account

SWIFT Code:

IBAN:

Exit Details ✖

Offshore Services ✖

Member Personal Details ✖

Address Details ✔

Court Orders ✔

Pension Benefit Options ✔

Provident Benefit Options ✔

**Payment Details ✔**

Add Documents

Validate

- This section must be completed if a part or full cash option was selected as a benefit payment option.

## H. Add Documents

Copies of the required documentation must be submitted, e.g. a certified copy of the member's ID document.

The screenshot shows the 'Documents' tab of the 'Withdrawal Benefit Claim Form'. At the top, there's a header with the Old Mutual logo and 'Corporate'. Below it, a navigation bar includes 'Search', 'Withdrawal Benefit Claim Form', and 'Documents'. A status bar shows 'Close', 'XYZ Retirement Fund', 'Ms. R. Funny', 'B154553B', and '768768'. The main section is titled 'List of Documents' and contains a note: 'Original Certified means that a Commissioner of Oaths, Justice of the Peace, Postmaster or Police Official, including the rank, name and force number, confirms the certification of a document.' Below this is a 'Document List' table with two columns: 'Item' and 'Form'. The table lists six items, each with a 'Download' button. The first item, 'Admission of liability and acknowledgement of debt', is highlighted. Below the table is a section titled 'Uploaded Documents for: Admission of liability and acknowledgement of debt' with 'Upload' and 'Remove' links. At the bottom is a table with columns: 'File Name', 'Date Uploaded', 'Document Type', 'Document', and an empty column.

Item	Form
Admission of liability and acknowledgement of debt	<a href="#">Download</a>
Original certified copy of RSA identity document or passport if member is not an RSA citizen	<a href="#">Download</a>
Copy of proposal or application form for transfer to another Approved Pension and/or Provide...	<a href="#">Download</a>
Release from Liability form (if payment by cheque is required)	<a href="#">Download</a>
Prior claim form (if applicable)	<a href="#">Download</a>
Others	<a href="#">Download</a>

File Name	Date Uploaded	Document Type	Document	
-----------	---------------	---------------	----------	--

- Documents applicable to the claim type will be listed.
- **Standard forms**
  - The following standard forms are available to download
    - Admission of Liability and acknowledgement of debt
    - Release from Liability form (if payment by cheque is required)
    - Prior claim form
    - Details of dependants/beneficiaries form (applicable to Death claims)
    - Trustee resolution for disbursement of death benefit to dependants/beneficiaries (applicable to Death claims)
  - To download a standard form, click on **Download**. You have the option to open or save the document.

## ■ Upload a document

Original Certified means that a Commissioner of Oaths, Justice of the Peace, Postmaster or Police Official, including the rank, name and force number, confirms the certification of a document.

Item	Form
Admission of liability and acknowledgement of debt	<a href="#">Download</a>
Original certified copy of RSA identity document or passport if member is not an RSA citizen	<a href="#">Download</a>
Copy of proposal or application form for transfer to another Approved Pension and/or Provide...	<a href="#">Download</a>
Release from Liability form (if payment by cheque is required)	<a href="#">Download</a>
Prior claim form (if applicable)	<a href="#">Download</a>
Others	<a href="#">Download</a>

Upload Documents for: Original certified copy of RSA identity document or passport if member is not an RSA citizen

[Upload](#) [Remove](#)

File Name	Date Uploaded	Document Type	Document
F_Copy_of_ID.pdf	17 August 2012	ID Document	<a href="#">Download</a>

eClaims - Document Upload Utility

Document:  [Browse...](#)

Document Type:

[Upload](#)

- To upload a document, select the type of document under the Document list and then click on **Upload**.
- Browse for the document that must be uploaded in the location where you have saved it. Select the Document Type from the dropdown list and click on Upload.
- The following document types can be uploaded:
  - .pdf, .txt, .csv, .jpg, .gif, .bmp, .jpeg, .tif and .png.

## ■ View updated documents

Original Certified means that a Commissioner of Oaths, Justice of the Peace, Postmaster or Police Official, including the rank, name and force number, confirms the certification of a document.

Item	Form
Admission of liability and acknowledgement of debt	<a href="#">Download</a>
Original certified copy of RSA identity document or passport if member is not an RSA citizen	<a href="#">Download</a>
Copy of proposal or application form for transfer to another Approved Pension and/or Provide...	<a href="#">Download</a>
Release from Liability form (if payment by cheque is required)	<a href="#">Download</a>
Prior claim form (if applicable)	<a href="#">Download</a>
Others	<a href="#">Download</a>

Upload Documents for: Original certified copy of RSA identity document or passport if member is not an RSA citizen

[Upload](#) [Remove](#)

File Name	Date Uploaded	Document Type	Document
F_Copy_of_ID.pdf	17 August 2012	ID Document	<a href="#">Download</a>

- Select the type of document under the Document list. A list of uploaded documents for that particular document type will be listed.
- Click on **Download** to view the document. You have the option to open or save the document.
- Click on **Remove** if you want to delete an uploaded document.
- To exit the "Upload a Document" menu, click on **Close**.

## I. Validate

Validations are performed to highlight the sections with outstanding information.

OLD MUTUAL Corporate

Search Withdrawal Benefit Claim Form

Submit Save Print Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Member Personal Details**

Title: Ms.  
Surname: Funny  
First Names: R  
Date of Birth: 06/06/1978  
ID Number: 7806065013081  
Other ID No/Passport No: Other ID No/Passport No  
Country of Issue: Country of Issue  
Income Tax Number: Income Tax Number  
Employee Number: 768768

**Contact Details - Where can Old Mutual contact you after leaving the company?**

Email Address: Email Address  
Cellphone Number: Cellphone Number  
Home Telephone Number: Home Telephone Number

Exit Details  
Offshore Services  
Member Personal Details  
Address Details  
Court Orders  
Pension Benefit Options  
Provident Benefit Options  
Payment Details  
Add Documents  
Validate

- Click on **Validate**
- The sections of the Claim form with outstanding information will open.
- Complete the outstanding information before continuing with step 5.

## Step 5 Save and Close the claim form

You can at any stage save the claim form and continue work on it at a later stage.

OLD MUTUAL Corporate

Search Withdrawal Benefit Claim Form

Submit Save Print Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Exit Details**

Date of service termination: 31/08/2012  
Final contribution month: 31/08/2012  
Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:

☒ Resignation  
☐ Voluntary  
☐ Involuntary  
☐ Dismissed  
☐ Absconded

**Prior Claim**

Is any prior claim in terms of Section 37D of the Pension Funds Act payable?  
If "Yes", please complete and submit the Prior Claim form.

**Close Confirmation**

All changes will automatically be saved.  
Do you want to continue?

Yes No

Exit Details  
Offshore Services  
Member Personal Details  
Address Details  
Court Orders  
Pension Benefit Options  
Provident Benefit Options  
Payment Details  
Add Documents  
Validate

- Click on **Close**. All changes will automatically be saved.
- Click on **Yes** to continue.
- You will then be taken back to the search result screen.

## Step 6 Upload additional supporting documents

Additional supporting documents can be uploaded if the claim is in a Draft or Submitted status.

**Search**

Search Criteria  
Scheme: XYZ Retirement Fund Bill Group: 57 - Bill Group 1

Member Search Criteria  
Payroll Number: Prior Member No: Surname: First Name: Date of Birth:

Payroll Number: Prior Member No: fun First Name: Date of Birth: Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
R	Funny	7808065013081	B154553B	06/06/1978	768768	67776	Active Member		Draft	Withdrawal	17/08/2012 09:13

- Select the member and click on **Documents**.
- Refer to Step 4H for detail on the uploading of Documents.

## Step 7 Submit a claim

When all mandatory fields are completed and all relevant forms attached, the claim may be submitted.

**OLD MUTUAL Corporate**

Search Withdrawal Benefit Claim Form

Submit Save Print Close

XYZ Retirement Fund | Ms. R Funny | B154553B | 768768

**Exit Details**

Date of service termination: 31/08/2012  
Final contribution month: 31/08/2012  
Date member signed claim form: 15/08/2012

**Type of Withdrawal**

**Note:**  
Be aware of the Rules of your Fund, as the member may already be eligible for retirement benefits.  
Select the involuntary retrenchment option ONLY in the event of a benefit becoming payable due to job losses.

Type of Withdrawal:

☒ Resignation  
☐ Voluntary Retrenchment  
☐ Involuntary Retrenchment  
☐ Dismissal  
☐ Abscondment

**Prior Claim**

Is any prior claim in terms of Section 37D of the Pension Funds Act payable? ☐ Yes ☒ No

If "Yes", please complete and submit the Prior Claim form.

**Exit Details** ✓  
Offshore Services ✓  
Member Personal Details ✓  
Address Details ✓  
Court Orders ✓  
Pension Benefit Options ✓  
Provident Benefit Options ✓  
Payment Details ✓  
Add Documents  
Validate

- Select the claim member and click on **Open**
- Click on **Submit**
- You will receive the following validation error message if you submit the form when there is still outstanding information required.

**Form Validation Error**

⚠ Please complete all mandatory fields before submitting.

OK

- You will have the option to open and print the claim form. You also have the option to save the print version of the claim form.
- Once the claim form has been submitted, additional supporting documents can still be uploaded.

## Step 8 Print claim form and obtain member's signature

A copy of the required claim documentation, signed by the member, must be kept in the member's personnel file for audit purposes.

### 4.5 CANCEL A CLAIM

- If a claim was submitted via the Payroll Process, it can only be cancelled if the Web Claim Status is **Draft**. Once a claim has been submitted, it cannot be cancelled via the Web. An email must be sent to the Old Mutual Administration team requesting the claim to be cancelled.
- If no claim has been submitted via the Payroll Process, then the claim can be cancelled in the Draft and Submitted status.

The screenshot shows the Old Mutual Corporate web application interface. At the top, there is a search bar with the following fields: Scheme (XYZ Retirement Fund), Bill Group (57 - Bill Group 1), and Member Search Criteria (Payroll Number, Prior Member No, Surname, First Name, Date of Birth). Below the search bar, there is a table of search results. The table has columns: First Name, Surname, ID Number, Member Number, Birth Date, Payroll Number, and Prior Member. The table contains five rows of data. A 'Cancel' button is visible above the table. A confirmation dialog box titled 'Cancel Claim' is overlaid on the right side of the screen. The dialog box contains the text: 'Please confirm you want to cancel the claim. This action cannot be reversed.' and two buttons: 'Yes' and 'No'. A mouse cursor is pointing at the 'Yes' button.

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member
N	Now	6011065019086	B154550B	06/11/1960	00012	78963
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656


- Select the member and click on **Cancel**.
- Click on **Yes** to confirm. Please note that the action cannot be undone.
- A new claim can be created once the claim has been cancelled.



## 4.6 PRINT THE CLAIM FORM

The employer is required to keep a printed and signed copy of the claim form in the members file.

The form can be printed at any time.

 **OLD MUTUAL**  
Corporate

**Search**

Search Criteria

Scheme XYZ Retirement Fund Bill Group 57 - Bill Group 1

Member Search Criteria

Payroll Number Prior Member No Surname First Name Date of Birth

Payroll Number Prior Member No Surname First Name Date of Birth Search Report

**Search Results**

Create Open Cancel Print Documents

First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member		Draft	Withdrawal	17/08/2012 11:03
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member		Draft	Withdrawal	15/08/2012 09:36
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member				

- Select the member
- Click on **Print**.

Verify details already captured by your Employer and complete/correct all outstanding details and return forms to your HR department.

**WITHDRAWAL BACK TO BACK BENEFIT CLAIM FORM**

Scheme Name XYZ Retirement Fund

Member Name Ms. R Funny

Member No B154553B Employee No 768768

**Member's Details**

Title Ms. Surname Funny

First Names R ID Number 7806065013081

Other ID No/Passport No Country of Issue

Date of Birth 06/06/1978 Employee Number 768768

Income Tax Number

Where can Old Mutual contact you after leaving the company?

Contact telephone number Contact cellphone number

Contact Email Address

**Residential Address**

Unit Number

Complex

Street Number

Street / Farm Name

Suburb / District

City

Postal Code

☐ Use Residential Address as the Postal Address

**Postal Address**

Address Line 1

Address Line 2

Address Line 3

Address Line 4

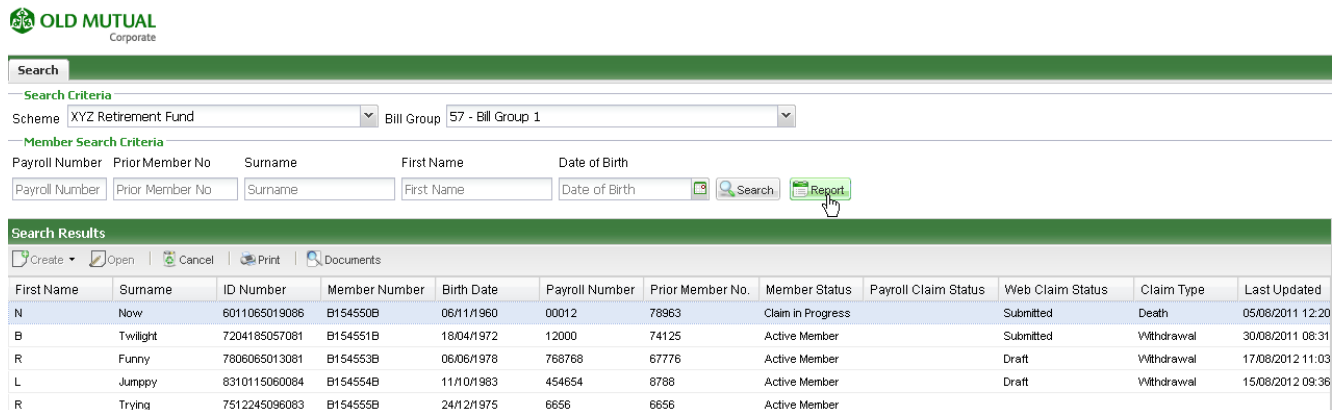
Postal Code

17/08/2012 Page 1 of 5

- The form will open as a .pdf document which you can print and save.

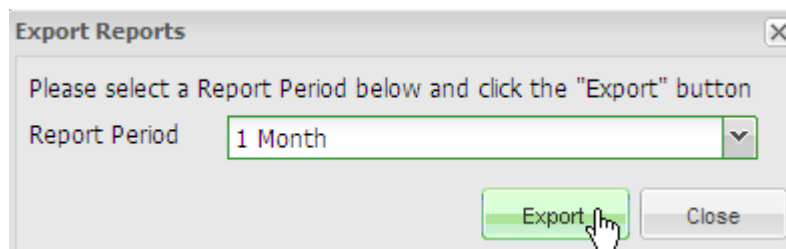
## 4.7 CLAIMS IN PROGRESS REPORT

The reports will display all information i.r.o. **Web claims in progress** for the specific bill group.



First Name	Surname	ID Number	Member Number	Birth Date	Payroll Number	Prior Member No.	Member Status	Payroll Claim Status	Web Claim Status	Claim Type	Last Updated
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Claim in Progress		Submitted	Death	05/08/2011 12:20
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125	Active Member		Submitted	Withdrawal	30/08/2011 08:31
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member		Draft	Withdrawal	17/08/2012 11:03
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member		Draft	Withdrawal	15/08/2012 09:36
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member				

- Select **Report**.



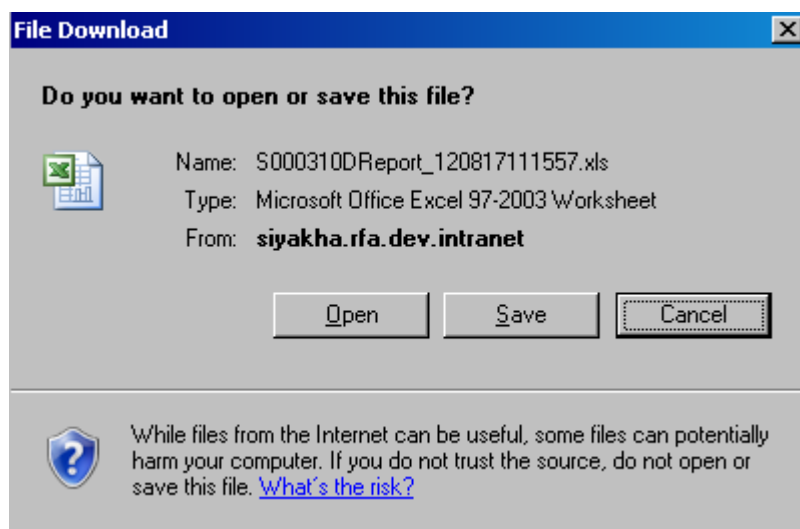
Export Reports

Please select a Report Period below and click the "Export" button

Report Period: 1 Month

Export Close

- Select the report period. One, two, three and six month periods are available for selection.
- Click on **Export**



File Download

Do you want to open or save this file?

Name: S000310DReport\_120817111557.xls  
Type: Microsoft Office Excel 97-2003 Worksheet  
From: siyakha.rfa.dev.intranet

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

- Select **OPEN** to open the report in Excel or select **SAVE** to save the report.

## Claims in Progress Report


### XYZ Retirement Fund


57 - Bill Group 1

Period	18/07/2012 - 17/08/2012												
Date Requested	17/08/2012 11:15:57												
First Name	Surname	Payroll No	Prior Member No	Member No	National ID No	Date of Birth	Member Status	Payroll	Web Claim	Last Modifier			
								Exit Date	Claim Type	Create Date	Claim Type	Claim Status	Last Update
R	Funny	768768	67776	8154553B	7806065013081	06/06/1978	Active Member			17/08/2012	Withdrawal	Draft	17/08/2012 11:03:09
L	Jumpy	454654	6788	8154554B	8310115060084	11/10/1983	Active Member			30/07/2012	Withdrawal	Draft	15/08/2012 09:36:42

- The report opens as an excel document.

## 4.8 EXIT THE ECLAIMS WEB


**SECURE SERVICES**
Home | Logoff



Search Criteria

Scheme XYZ Retirement Fund Bill Group

Member Search Criteria

Payroll Number  Prior Member No  Last Name  First Name  Date of Birth

Search Results

Create Open Cancel Print Upload

First Name	Last Name	ID Number	Member Number	Birth Date	Payroll Number	Prior Member ...	Member Status	Payroll Claim Status	Web Claim Sta...
N	Now	6011065019086	B154550B	06/11/1960	00012	78963	Termination Awa...	Submitted	
B	Twilight	7204185057081	B154551B	18/04/1972	12000	74125	Active Member	Submitted	
K	Ramble		B154552B	20/09/1974	45585	45578	Active Member	Draft	
R	Funny	7806065013081	B154553B	06/06/1978	768768	67776	Active Member	Draft	
L	Jumpy	8310115060084	B154554B	11/10/1983	454654	8788	Active Member	Draft	
R	Trying	7512245096083	B154555B	24/12/1975	6656	6656	Active Member		

- Click on **Logoff** if you want to log out of Old Mutual's Secure Services.
- Click on **Home** if you want to go back to the Retirement Scheme Administration home page.