AGPOL

Data upload guide

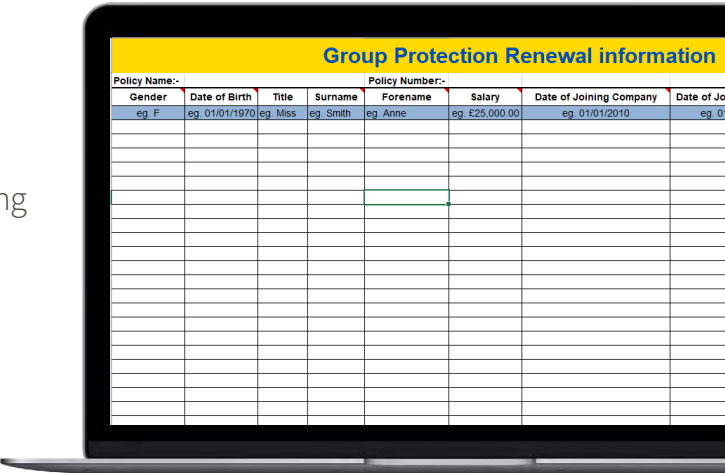for a Group Protection renewal

Before you get started

If you have lots of changes or have a policy with more than 20 members, you will need to upload your member data via our easy-to-use

🌐 **Excel template here**

**1** **Download** the spreadsheet and **click** enable editing

2 Before you **upload** your data, **hover** over the titles to find tips and guidance on how to upload your data correctly. It is important to make sure you have entered the data in the expected format to avoid the spreadsheet being rejected. The spreadsheet will get **rejected** if the file is larger than 5mb.

**3** Once you have **uploaded** your data, **click** save
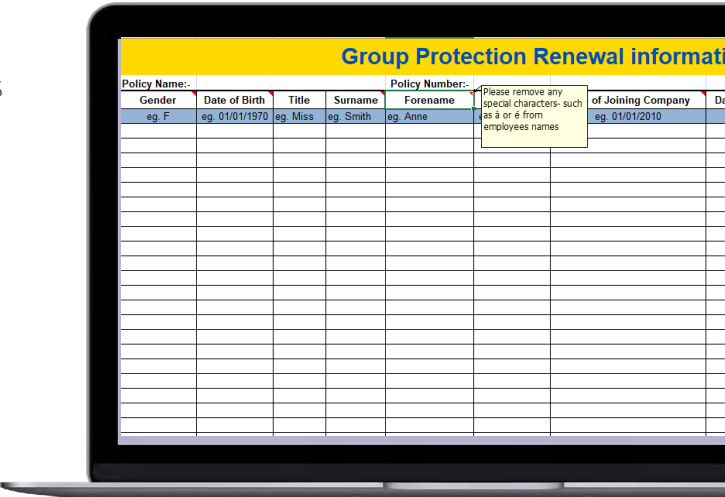
**4** **Drag or upload** the saved Excel file onto AGPOL
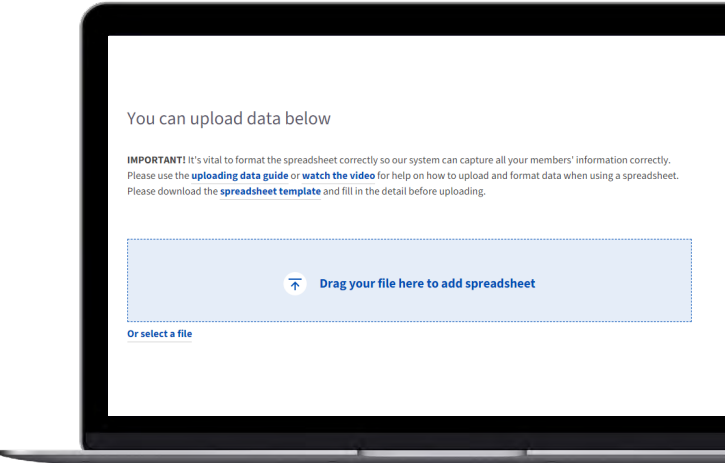
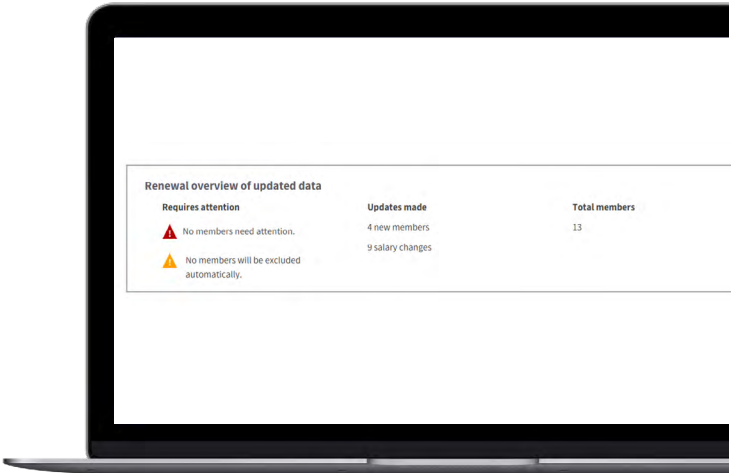**5** You will then be able to see your data and make any **changes / amends**

Please note, red notifications indicate that the member needs attention, this might be something like a missing category code.

Amber notifications will show you any members that are to be excluded from the policy, explaining why. It may be that some members don't meet the eligibility criteria.
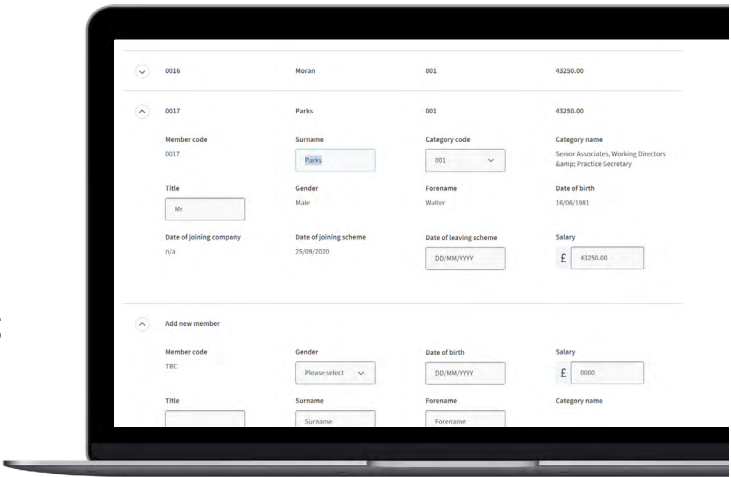
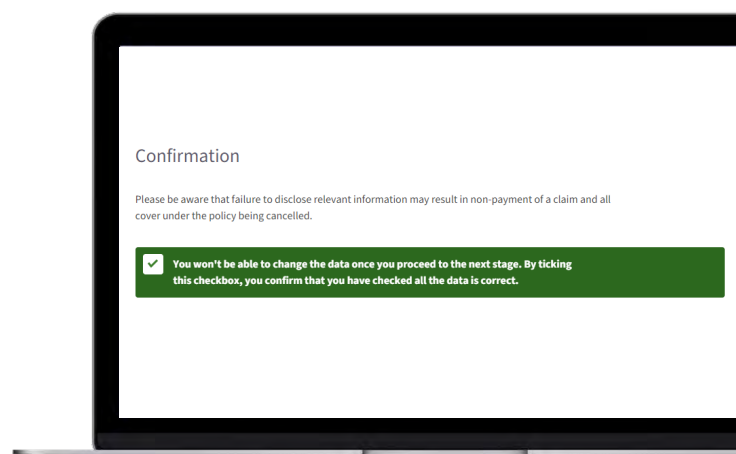**6** If you make any changes / amends, remember to **press save**
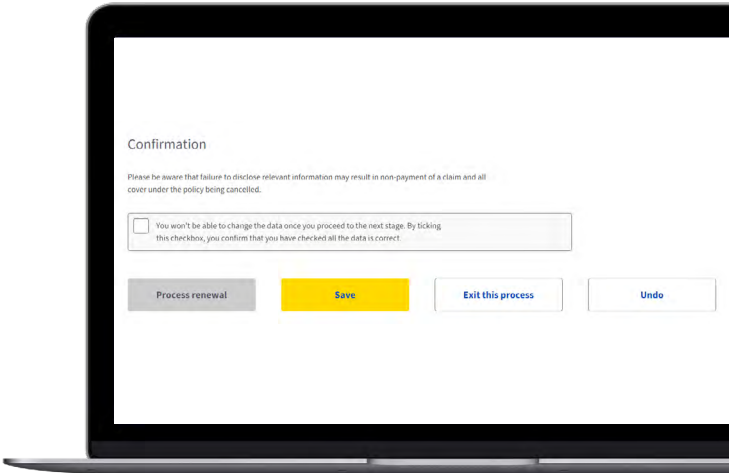
7 Once you **save** your data, you will be presented with a renewal overview which will give you a high-level summary of the changes you have made. This is to ensure you are happy with the changes

8 **Click** the confirmation button at the bottom once you are happy and process your renewal

Confirmation

Please be aware that failure to disclose relevant information may result in non-payment of a claim and all cover under the policy being cancelled.

☑ **You won't be able to change the data once you proceed to the next stage. By ticking this checkbox, you confirm that you have checked all the data is correct.**

If you need further assistance

🌐 **Watch our 'How to' video on uploading member data <u>here</u>**

✉ **Or, contact our support team <u>here</u>**

AVIVA