

Aviva Group Protection Online

Data Upload Guide



Reference: GR06188 – 03.19

When you have completed steps 1-3 you will be presented with the page as shown below. Select “Copy on Web-Page”. Pressing this tab will allow you to copy and paste your data and arrange the columns.

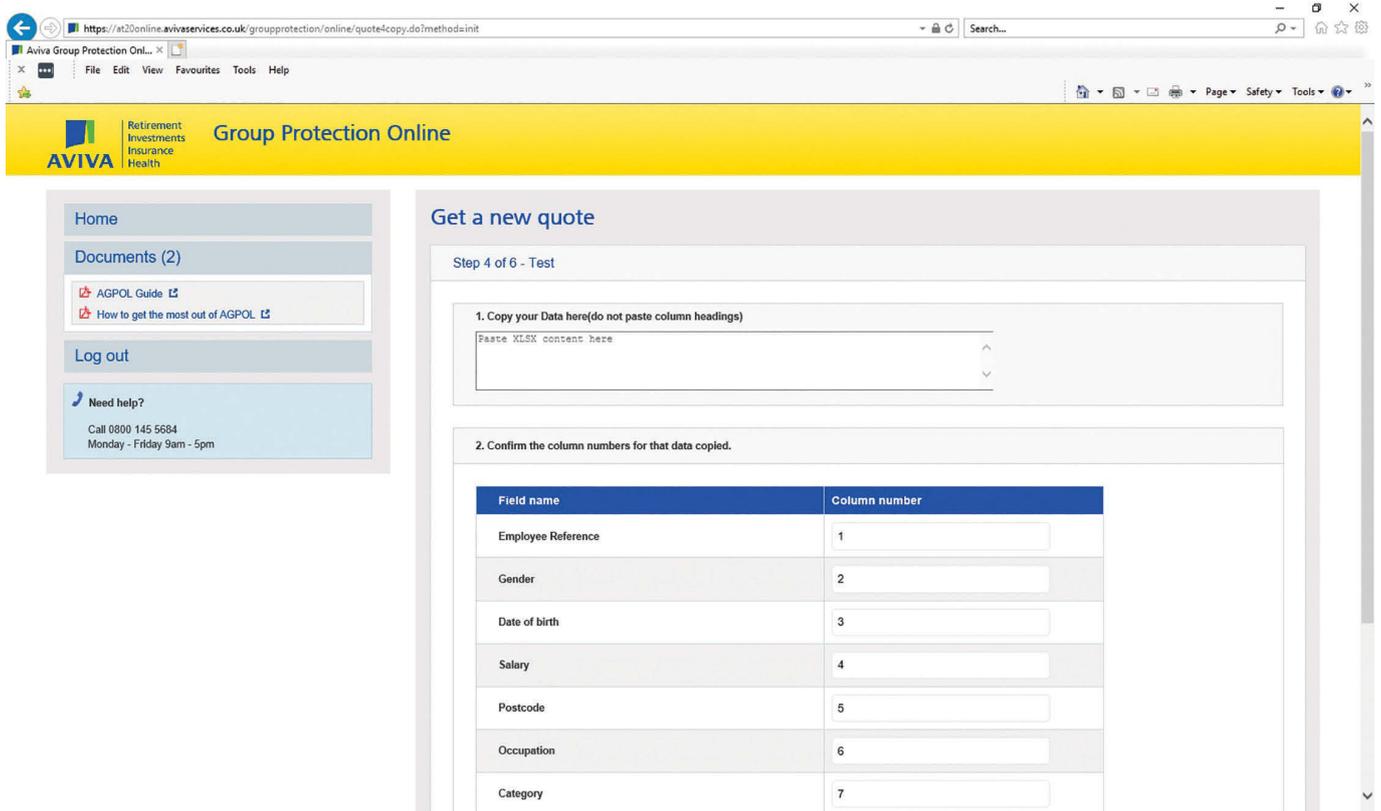
The screenshot shows the Aviva Group Protection Online interface. The top navigation bar includes the Aviva logo and the text 'Retirement Investments Insurance Health' and 'Group Protection Online'. The main content area is titled 'Get a new quote' and is labeled 'Step 4 of 6 - Test'. It contains three instructions for uploading data, with a 'Copy on Web-page' button highlighted under the first instruction. Below the instructions is a table for manual data entry.

Manually enter data into the table below

Select	Employee ref	Gender	Date of birth (dd/mm/yyyy)	Salary	Postcode	Occupation	Category
<input type="checkbox"/>	1234567	Dropdown	08/07/1967	10000	SW7 1BD	Director	Dropdown
<input type="checkbox"/>		Please select				Match Occupation	Please select
<input type="checkbox"/>		Please select				Match Occupation	Please select
<input type="checkbox"/>		Please select				Match Occupation	Please select
<input type="checkbox"/>		Please select				Match Occupation	Please select

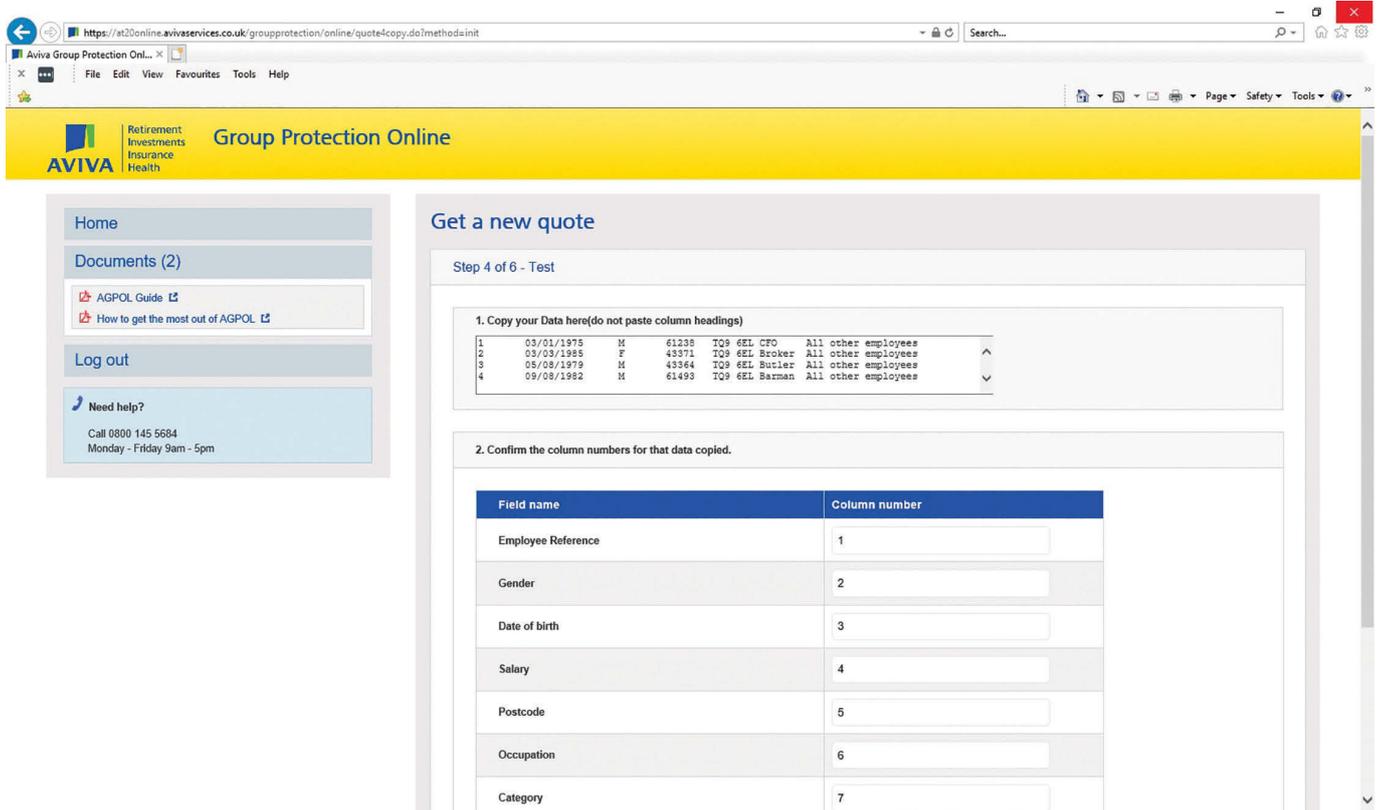
By arranging your columns into the correct order (using the column aid ordering template located on the screen as shown above) you will find it easier to place your data in to the system. If you choose to place your data first you can use the table pictured (figure 1) on the next page to put it in order (the system requires that the data is in a specific order).

Figure 1



Below is an example of data after using the table from Figure 1.

Figure 2



In figure 3 below, this shows how the data would look if you choose *not* to paste the data in the order of the template (accessed on the member upload page). To put the data in the correct order, enter the column number from your spreadsheet that directly relates to the “Field name”, as shown below.

Figure 3

Get a new quote

Step 4 of 6 - Test

1. Copy your Data here (do not paste column headings)

All other employees	3	05/08/1979	M	43364	T09 EEL Butler
All other employees	4	09/08/1982	M	61493	T09 EEL Barman
All other employees	5	07/08/1982	M	89784	T09 EEL Plumber
All other employees	6	01/08/1982	M	47596	T09 EEL Painter

2. Confirm the column numbers for that data copied.

Field name	Column number
Employee Reference	<input type="text" value="2"/>
Gender	<input type="text" value="3"/>
Date of birth	<input type="text" value="4"/>
Salary	<input type="text" value="5"/>
Postcode	<input type="text" value="6"/>
Occupation	<input type="text" value="7"/>
Category	<input type="text" value="1"/>

When you have placed the data in the correct order, press the button labelled “Upload Data”.

Your data will now be uploaded in to the system with any discrepancies highlighted in red (see figure 4 below). The discrepancies can be corrected using the prompts detailed in the red banner.

Figure 4

Any discrepancies stopping you getting a quote are highlighted in red.

• Please check that all fields are completed and you have validated the occupation by using the Match Occupation link.
 • Please correct the date in date of birth field.
 • Please ensure you have validated the occupation using the Match Occupation/Match Supervisor Type link.
 • We have been unable to provide you with an online quotation due to the nature of the occupations of some of the members. If you have any questions or would like us to review the occupations, please contact an Aviva Sales Consultant on 0800 1455 684 to discuss further. Thank you.

Manually enter data into the table below

Select	Employee ref	Gender	Date of birth (dd/mm/yyyy)	Salary	Postcode	Occupation	Category
	1234567	Dropdown	08/07/1967	10000	SW7 1BD	Director	Dropdown
<input type="checkbox"/>	101	Male	23/03/1998	53000	M50 3RA	Wardrobe Match Occupation	All employees
<input type="checkbox"/>	102	Male	08/08/1982	25000	M50 3RA	Pilot Declined Occupation	All employees
<input type="checkbox"/>	103	Male	07/09/1939	66348.22	M50 3RA	Domestic Cle Match Occupation	All employees
<input type="checkbox"/>	104	Female	04/03/1982	69589.62	M50 3RA	Maintenance Match Occupation	Please select
<input type="checkbox"/>	105	Female	25/01/1972	25366.98	M50 3RA	Deputy Dome Match Occupation	All employees
<input type="checkbox"/>	106	Female	06/12/1983	55698.32	M50 3RA	Electrician Match Occupation	All employees
<input type="checkbox"/>	107	Female	08/02/1973	116696.8	M50 3RA	Teaching Ass Match Occupation	All employees

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.

Previous Delete all Delete selected Get quote

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Employee ref 101 shows an occupation not listed in our system. By clicking “match occupation” you will be asked to select the general occupation classification from a range of options (see figure 5 below).

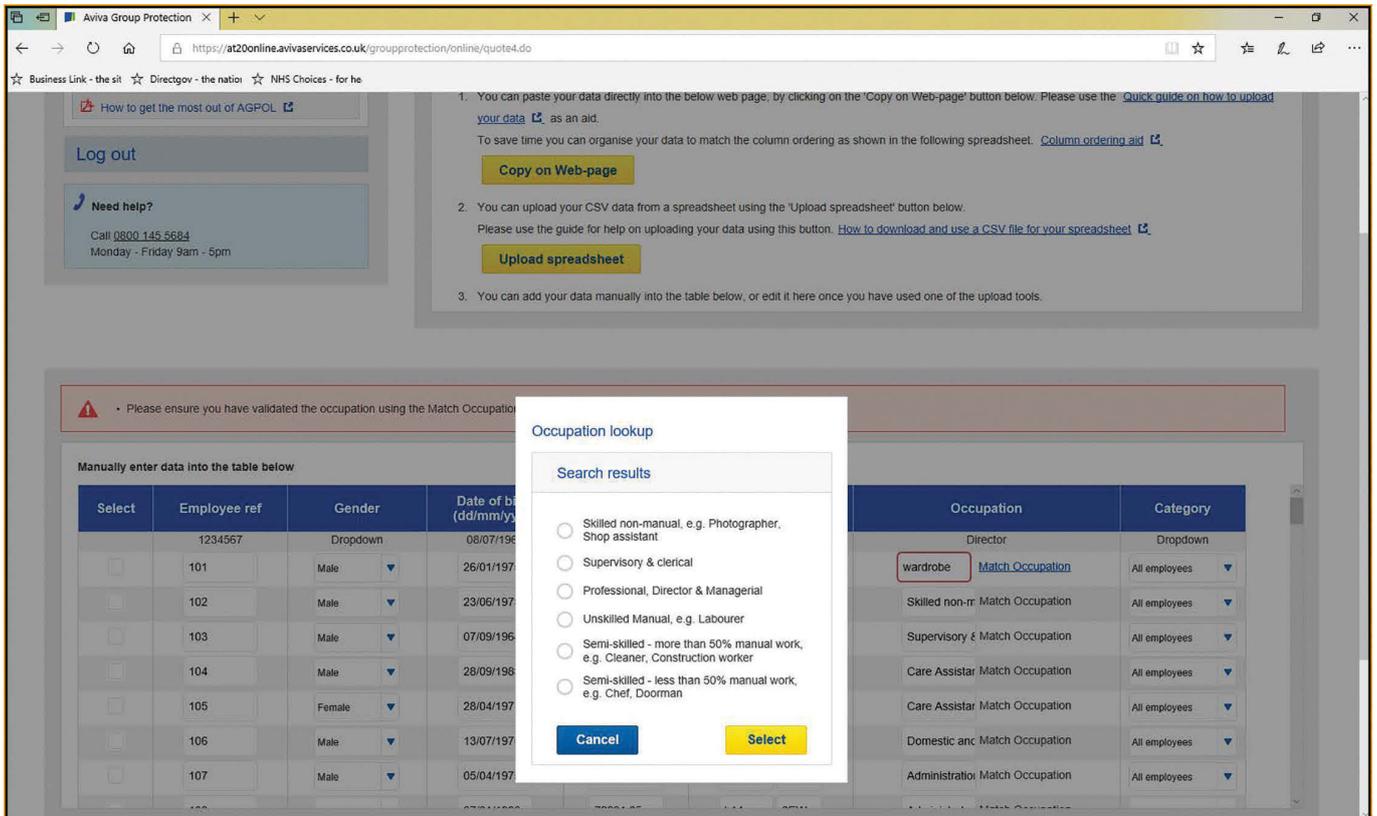
Employee ref 102 shows an occupation that we are unable to include. This member will need to be removed before you can continue. To remove the member click on the box in the “Select” column and press the “Delete Selected” tab.

Employee ref 103 shows an ineligible member. The system has indicated that the member has a date of birth outside the allowed age range and the member will need to be removed before you can continue. To remove the member click on the box in the “Select” column and press the “Delete Selected” tab.

Employee ref 104 shows that no gender is specified for this member. You will need to make a selection from the drop down options before you can continue.

Figure 5

If you enter an occupation that is not recognised by our system, the following occupation classifications will be shown after clicking “Match Occupation”.



You will need to select the general occupation classification for any occupations not recognised by the system. You can only select one classification.

Figure 6

Once you have corrected the discrepancies, press the “Get Quote” tab. Any further discrepancies will then be highlighted.

The screenshot shows a web browser window with the URL <https://online.avivaservices.co.uk/groupprotection/>. The page includes a contact number (0800 145 5684), an "Upload spreadsheet" button, and a warning message: "Please check that all fields are completed and you have validated the occupation by using the search link." Below this is a table titled "Manually enter data into the table below" with 9 rows. Each row contains a checkbox, a number (1-9), a gender dropdown, a date, a monetary value, a location code, a job code, an occupation with a search button, and another dropdown menu. The value "\$25468.23" in row 2 and the text "test" in row 4 are highlighted with red boxes. At the bottom of the table, there is a "Please select" dropdown in row 8. Below the table are buttons for "Previous", "Delete all", "Delete selected", and "Get quote". A footer section contains the text "For Advisers use only" and links for "website legal notices", "© Copyright", and "accessibility".

	1234567	Dropdown	08/07/1967	10000	SW7 1BD	Director	Dropdown
<input type="checkbox"/>	1	Female	08/08/1982	25000.23	E14 4AA	Manager Search	Weekly paid employees
<input type="checkbox"/>	2	Female	08/08/1982	\$25468.23	E14 4AA	Manager Search	Weekly paid employees
<input type="checkbox"/>	3	Female	08/08/1965	250000	M50 3RA	Manager Search	Weekly paid employees
<input type="checkbox"/>	4	Female	08/08/1982	300000	M50 3RA	test Search	Managers
<input type="checkbox"/>	5	Female	08/08/1982	55000	SE1 9LB	Manager Search	Managers
<input type="checkbox"/>	6	Male	08/08/1982	65000	SE1 9LB	Manager Search	Managers
<input type="checkbox"/>	7	Female	08/08/1982	75000	M50 3RA	Manager Search	Directors
<input type="checkbox"/>	8	Male	08/08/1982	37500	M50 3RA	Manager Search	Please select
<input type="checkbox"/>	9	Female	08/08/1992	37500	GY1 3ZS	Manaer Search	Director

Figure 7

Shows that your quote has been competed (but not placed on risk).

The screenshot shows a web browser window with the URL <https://at20online.avivaservic...> and the page title "Aviva Group Protection Online". A cookie notice is visible at the top. The main header features the Aviva logo and the text "Retirement Investments Insurance Health" and "Group Protection Online".

The main content area is titled "Get a new quote" and shows "Step 5 of 6". A message states "Your quote is now complete." Below this is a "Summary" table:

Summary	
For	Hints & Tips Guide
Quote ref no	GLA/54539
No of lives	15
Sum assured	£2,514,991
First year premium	£736.66
Commission	15 %
Free cover limit	£600,000

To the right of the summary table is a "Quote documents" section with links to "View full quote", "View application form", and "View Technical Guide". Below this is a "Quote for other products" section with buttons for "Quote for Group Critical Illness" and "Quote for Group Income Protection". At the bottom of the quote summary area are buttons for "Re-quote" and "Go on risk".

On the left side of the page, there is a navigation menu with "Home", "Documents (3)" (containing links to "User guide", "FAQ's", and "Top ten tips"), "Log out", and "Need help?" (with contact information: "Call 0800 145 5684 Monday - Friday 9am - 5pm").

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