

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'. The main heading is 'Group Protection Online'. On the left, there is a sidebar with links: 'Home', 'Documents (2)' (containing 'AGPOL Guide' and 'How to get the most out of AGPOL'), 'Log out', and 'Need help?' (with contact information: 'Call 0800 145 5684 Monday - Friday 9am - 5pm').

The main content area is titled 'Get a new quote' and shows 'Step 4 of 6 - Test'. It contains three instructions for uploading data:

1. You can paste your data directly into the below web page, by clicking on the 'Copy on Web-page' button below. Please use the [Quick guide on how to upload your data](#) as an aid. To save time you can organise your data to match the column ordering as shown in the following spreadsheet. [Column ordering aid](#).
Copy on Web-page
2. You can upload your CSV data from a spreadsheet using the 'Upload spreadsheet' button below. Please use the guide for help on uploading your data using this button. [How to download and use a CSV file for your spreadsheet](#).
Upload spreadsheet
3. You can add your data manually into the table below, or edit it here once you have used one of the upload tools.

Below the instructions is a table for manual data entry. The table has the following columns: Select, Employee ref, Gender, Date of birth (dd/mm/yyyy), Salary, Postcode, Occupation, and Category. The first row is pre-filled with data: Employee ref 1234567, Gender Dropdown, Date of birth 08/07/1967, Salary 10000, Postcode SW7 1BD, Occupation Director, and Category Dropdown. Subsequent rows have empty input fields for each column, with 'Please select' dropdowns for Gender and Category, and 'Match Occupation' for Occupation.

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

Aviva Group Protection Online

Home

Documents (2)

AGPOL Guide

How to get the most out of AGPOL

Log out

Need help?

Call 0800 145 5684
Monday - Friday 9am - 5pm

Get a new quote

Step 4 of 6 - Test

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

Paste XLSX content here

2. Confirm the column numbers for that data copied.

Field name	Column number
Employee Reference	1
Gender	2
Date of birth	3
Salary	4
Postcode	5
Occupation	6
Category	7

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

Figure 2

Aviva Group Protection Online

Home

Documents (2)

AGPOL Guide

How to get the most out of AGPOL

Log out

Need help?

Call 0800 145 5684
Monday - Friday 9am - 5pm

Get a new quote

Step 4 of 6 - Test

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

1	03/01/1975	M	61238	TQ9 6EL	CFO	All other employees
2	03/03/1985	F	43371	TQ9 6EL	Broker	All other employees
3	05/08/1979	M	43364	TQ9 6EL	Barman	All other employees
4	09/08/1982	M	61493	TQ9 6EL	Barman	All other employees

2. Confirm the column numbers for that data copied.

Field name	Column number
Employee Reference	1
Gender	2
Date of birth	3
Salary	4
Postcode	5
Occupation	6
Category	7

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

The screenshot shows the Aviva Group Protection Online interface. The main heading is "Get a new quote" and the sub-heading is "Step 4 of 6 - Test".

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

All other employees	3	05/08/1979	M	43364	TQ9 6EL Butler
All other employees	4	09/08/1982	M	41493	TQ9 6EL Barman
All other employees	5	07/08/1982	M	89784	TQ9 6EL Plumber
All other employees	6	01/08/1982	M	47596	TQ9 6EL 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.

The screenshot shows a web browser window with the URL <https://at20online.avivaservices.co.uk/groupprotection/online/quote4.do>. The page title is "Aviva Group Protection Online". A red banner at the top contains the following text:

- 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.

Below the banner, a heading reads "Manually enter data into the table below". The table has the following columns: Select, Employee ref, Gender, Date of birth (dd/mm/yyyy), Salary, Postcode, Occupation, and Category. The data rows are as follows:

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"/>	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

Below the table, a blue banner reads: "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." At the bottom, there are four buttons: "Previous", "Delete all", "Delete selected", and "Get quote".

At the very bottom, a small section for advisers includes the text "For Advisers use only" and links to "website legal notices", "Copyright", and "accessibility".

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).

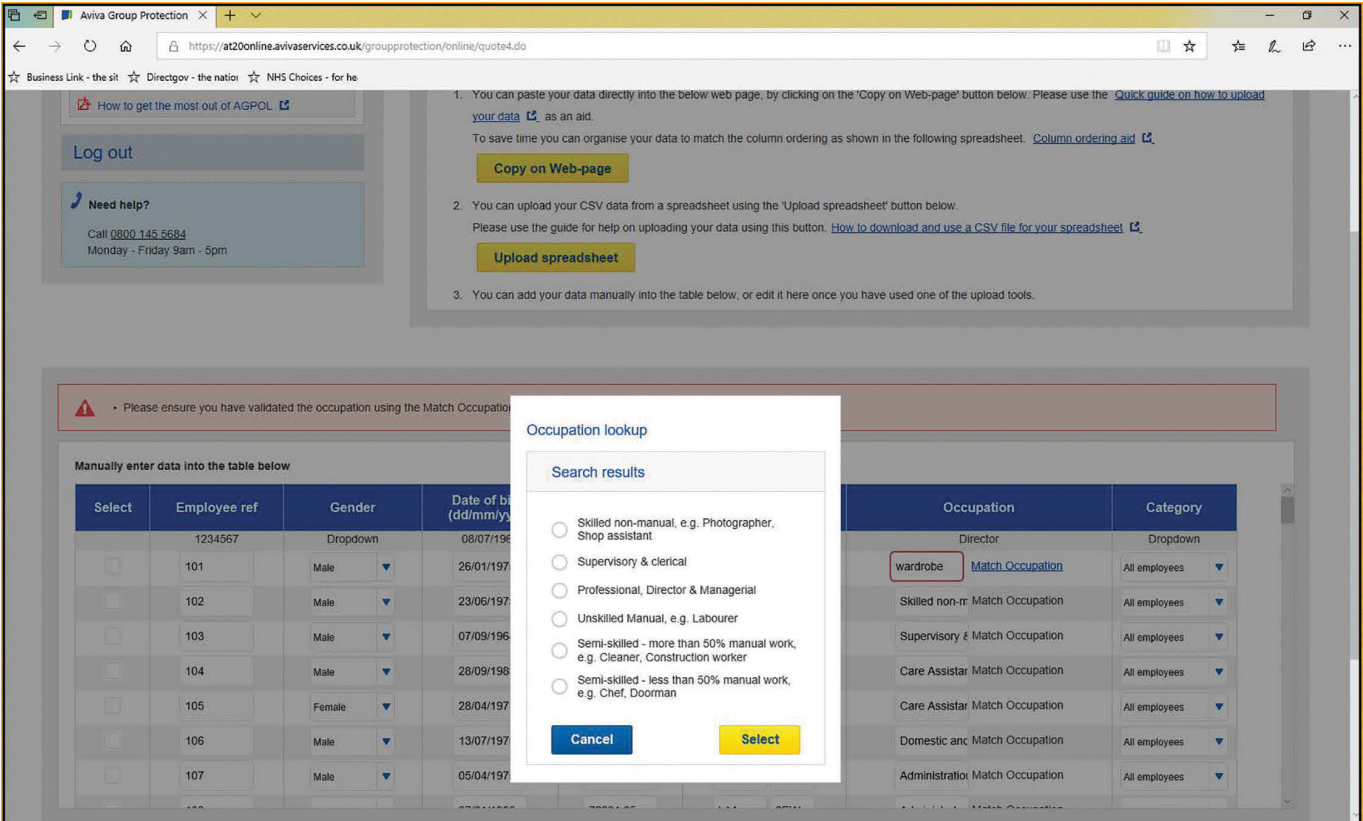
Employee ref 102 shows an occupation that we are unable to include. This member will need to be removed before you can continue. To remove the member click on the box in the "Select" column and press the "Delete Selected" tab.

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.

Call 0800 145 5684
Monday - Friday 9am - 5pm

Upload spreadsheet

3. You can add your data manually into the table below, or edit it here once you have used one of the upload tools.

Please check that all fields are completed and you have validated the occupation by using the search link.

Manually enter data into the table below

	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	08/08/1982	37500	GY1 3ZS	Manaoer Search	Director

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

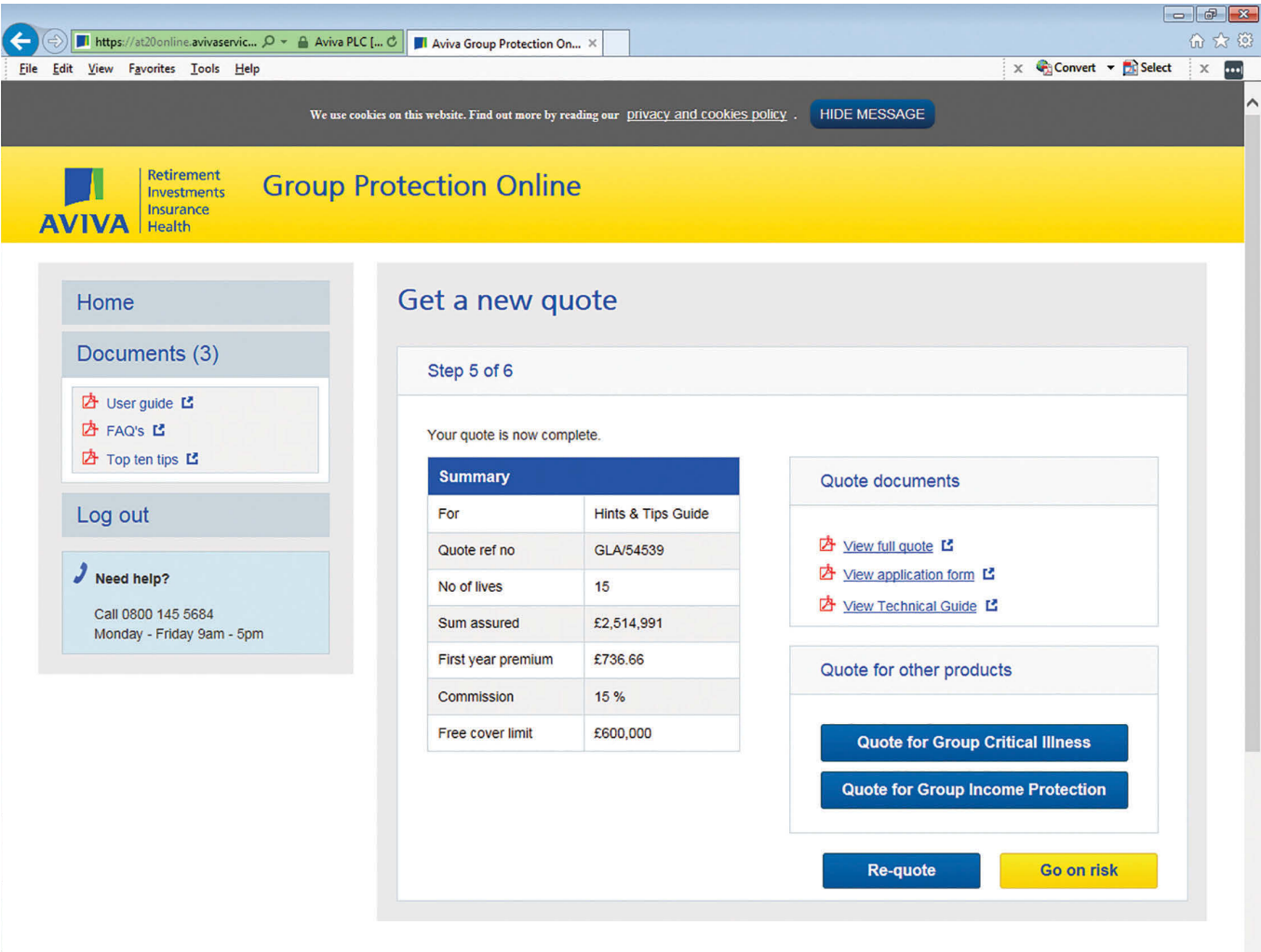
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Figure 7

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



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