For adviser use only

My Work Tracker

Reference guide

March 2021

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Introduction

My Work Tracker is an online client request management tool that's available on MLC AdviserOnline. My Work Tracker lets you view and track client requests that have been sent to us.

Each day, My Work Tracker is fed information from our administration systems to provide you with updates on the status of your clients requests.

As such, My Work Tracker can provide you with comprehensive up to date information on a range of requests, including new business applications, enquiries, investment switches and withdrawals.

My Work Tracker is available for your clients that have the following products:

- MLC MasterKey
- MLC MasterKey Business Super

Benefits

My Work Tracker can help you manage your clients by:

- Providing comprehensive and current updates on the status of your clients requests
- Alerting you to additional or outstanding information that we require to process a request
- Letting you upload documents online to us
- Filtering the requests that are important to you by product, request type and status
- Saving you time checking the status of requests with us via telephone or email, and
- Letting you produce reporting at an adviser portfolio level

The status of your clients requests are continually fed to My Work Tracker from our administration systems, ensuring that the information you see online is always up to date.

How to access

To access My Work Tracker

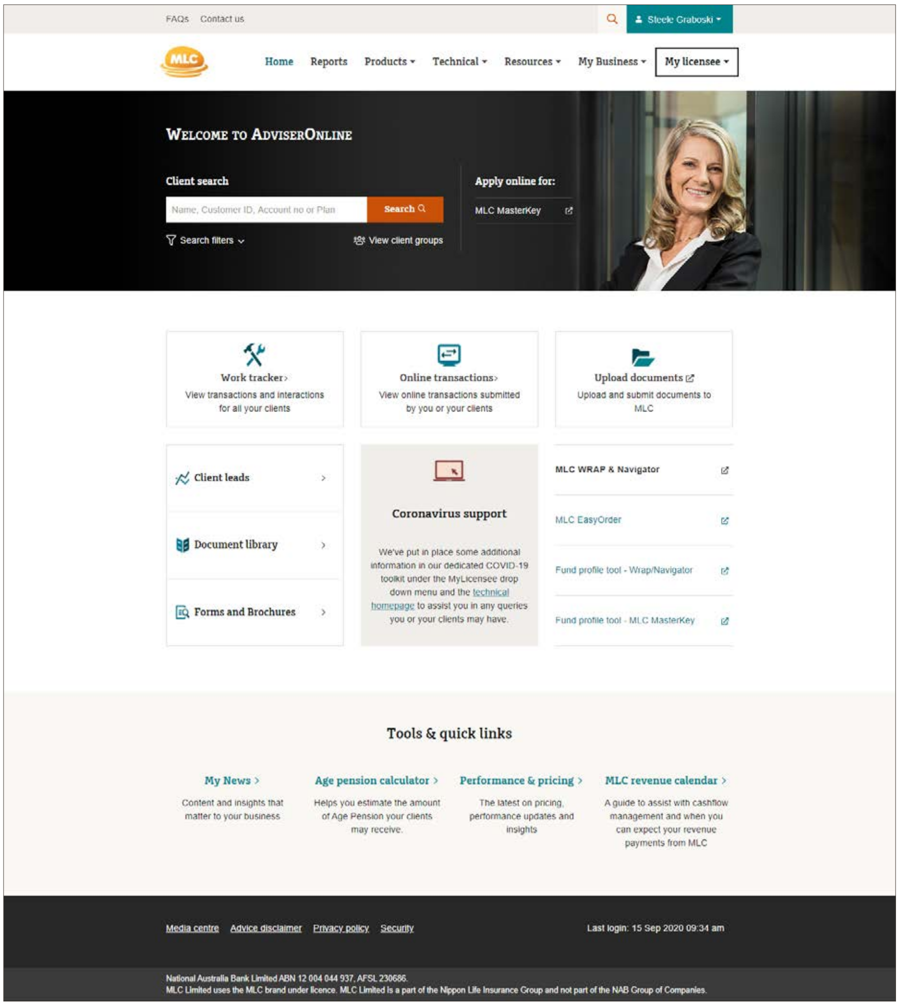
- Visit **mlc.com.au** and click **Login**.
- Enter your username and password and click **Login now**.
- Once you've logged into the MLC AdviserOnline homepage, click **Work tracker**.

Don't have secure access to mlc.com.au?

Please call us on **133 652**.

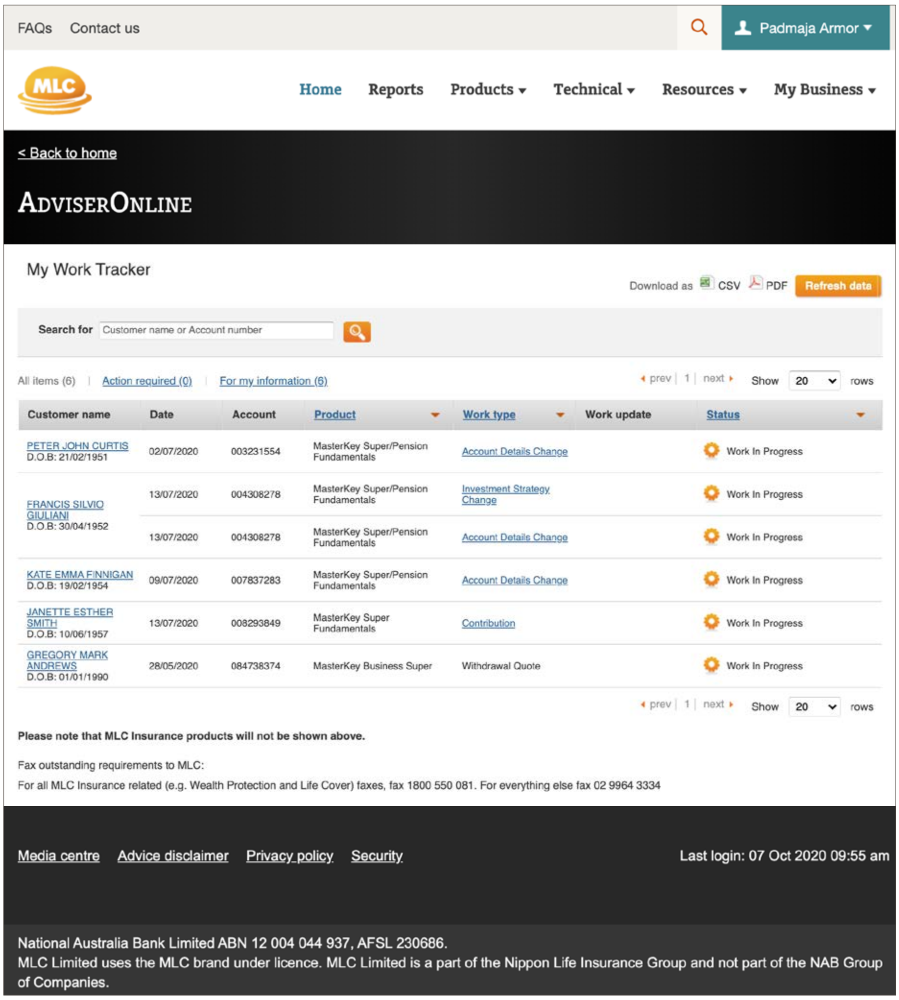
Forgot your password?

If you've forgotten your password, you can reset it online by visiting **mlc.com.au/login** and clicking **Forgot your password?**



Summary page

The My Work Tracker summary page provides an overview of your clients requests. The following pages of the guide describe My Work Tracker's features in detail.



Searching for your clients

My Work Tracker displays by default up to 20 rows of clients requests.

If your client(s) doesn't appear on the first page, you can search for them by entering their name, customer or account number into the search bar.

Alternatively, you can view additional rows of requests by selecting another page or extending the number of rows displayed on each page (up to 100).

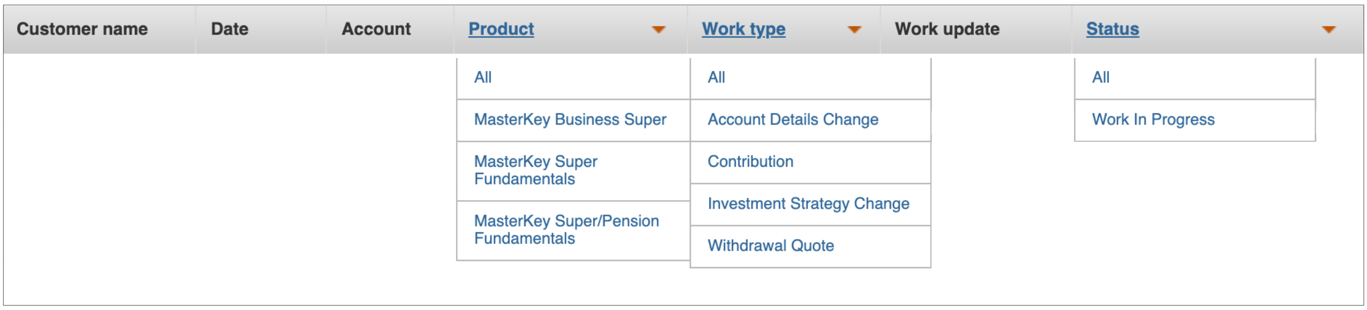
Filtering requests

In My Work Tracker, you can choose to view:

- All items
- Items that require actions; or
- Items that contain information only and require no action.

You can also filter how the requests are displayed by:

- Product
- Work type (e.g. request type)
- Status



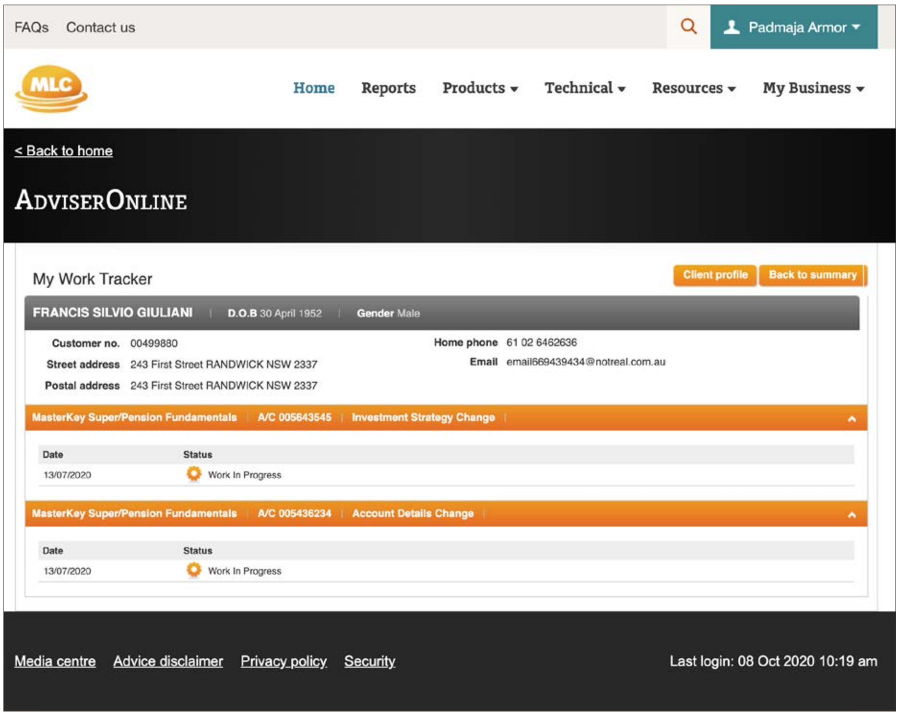
Viewing requests in detail

To view requests in detail, click on the work type linked to your client.

If you have a request that requires attention, we'll provide notes to describe the outstanding requirements.

You can view the status of all other requests linked to a client by clicking the drop down accordions.

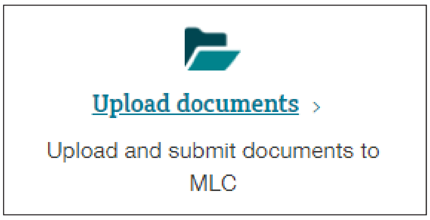
If the status indicates an outstanding requirement, the details can be downloaded as a CSV spreadsheet or PDF document.

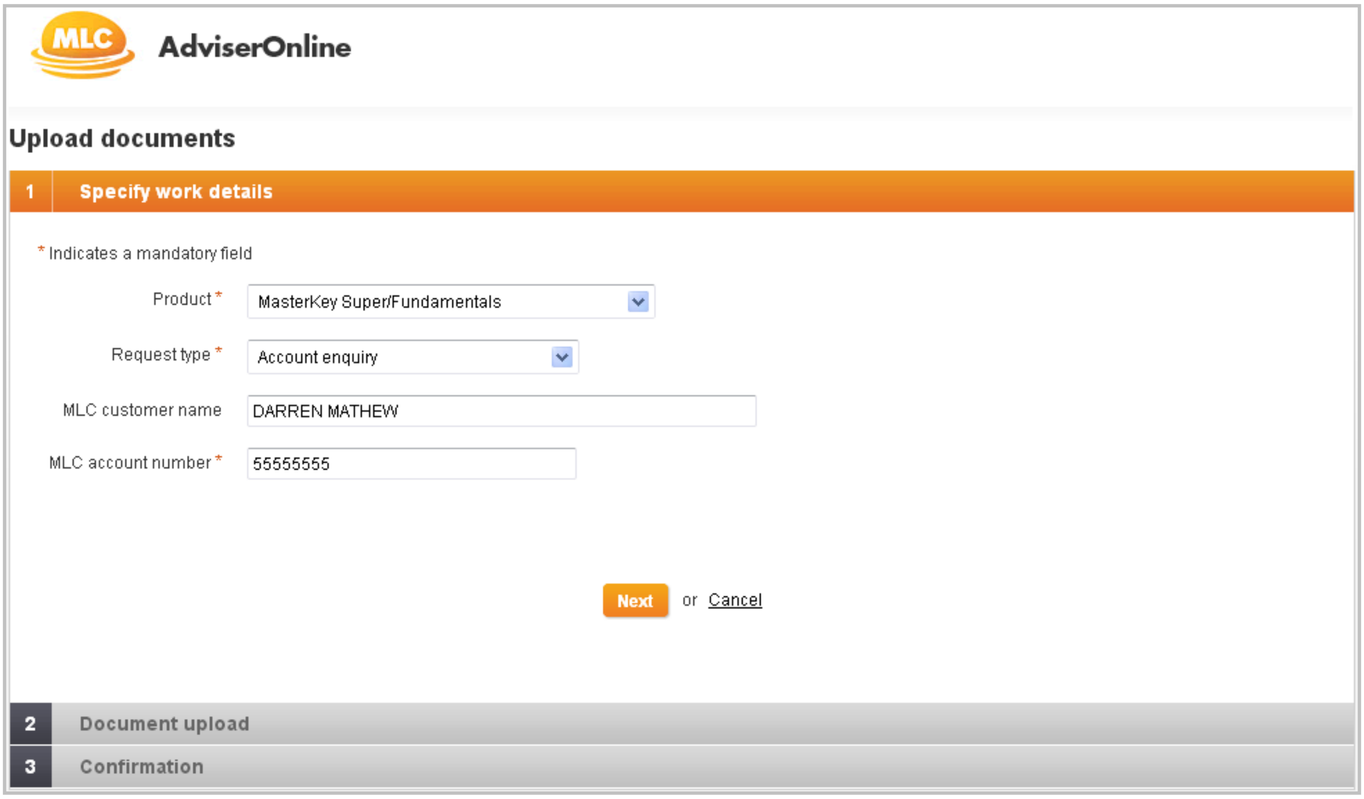


Uploading documents

My Work Tracker lets you quickly and easily send us documents for your clients online. You can upload documents directly from your MLC AdviserOnline dashboard using the Upload documents function. It's a quick and efficient alternative to mailing or faxing.
To upload documents to MLC:

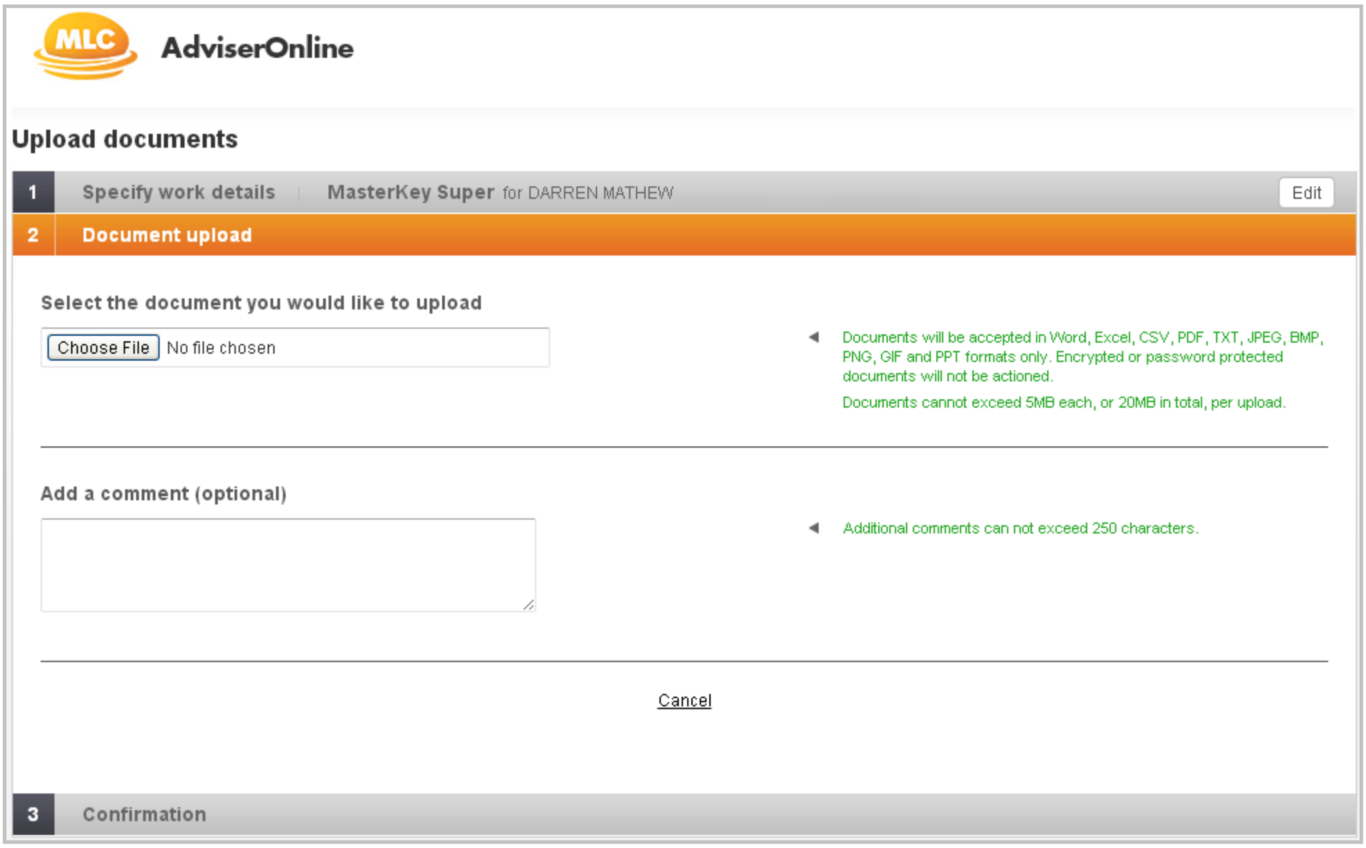
1. Click **Upload documents** from the MLC AdviserOnline dashboard.
2. Then, from the drop down menus select the **Product and Request** types. Then enter the client's name and account number (account number not required if New application Request type is selected). Then click **Next**.





Uploading documents

3. Select the **document** you'd like to upload and add any comments.



Help

For more information and assistance, please visit our MLC AdviserOnline **FAQs**, or call us on **133 652** between 8 am and 7 pm (AEST/AEDT).

For more information call us on 133 652

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