



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?**

The screenshot displays the MLC AdviserOnline interface. At the top, there is a navigation bar with links for Home, Reports, Products, Technical, Resources, My Business, and My licensee. A search bar is located in the top right corner. Below the navigation bar, a large banner area features a 'WELCOME TO ADVISERONLINE' message and a 'Client search' section with a search input field and a 'Search' button. To the right of the search bar, there is an 'Apply online for:' section with a dropdown menu currently set to 'MLC MasterKey'. A profile picture of a woman is visible on the right side of the banner. Below the banner, there are several service tiles: 'Work tracker' (View transactions and interactions for all your clients), 'Online transactions' (View online transactions submitted by you or your clients), 'Upload documents' (Upload and submit documents to MLC), 'Client leads', 'Document library', 'Forms and Brochures', 'MLC WRAP & Navigator', 'MLC EasyOrder', 'Fund profile tool - WrapNavigator', and 'Fund profile tool - MLC MasterKey'. A 'Coronavirus support' section is also present, providing information about COVID-19. At the bottom, there is a 'Tools & quick links' section with links for 'My News', 'Age pension calculator', 'Performance & pricing', and 'MLC revenue calendar'. The footer contains links for 'Media centre', 'Advice disclaimer', 'Privacy policy', and 'Security', along with the last login time: '15 Sep 2020 09:34 am'. Small text at the very bottom identifies the parent company as National Australia Bank Limited.

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.

FAQs Contact us Q Padmaja Armor

MLC [Home](#) [Reports](#) [Products](#) [Technical](#) [Resources](#) [My Business](#)

[< Back to home](#)

ADVISER ONLINE

My Work Tracker

Download as [CSV](#) [PDF](#) [Refresh data](#)

Search for Q

All items (6) | [Action required \(0\)](#) | [For my information \(6\)](#) prev | 1 | next Show rows

Customer name	Date	Account	Product	Work type	Work update	Status
PETER JOHN CURTIS D.O.B: 21/02/1951	02/07/2020	003231554	MasterKey Super/Pension Fundamentals	Account Details Change		Work In Progress
FRANCIS SILVIO GIULIANI D.O.B: 30/04/1952	13/07/2020	004308278	MasterKey Super/Pension Fundamentals	Investment Strategy Change		Work In Progress
	13/07/2020	004308278	MasterKey Super/Pension Fundamentals	Account Details Change		Work In Progress
KATE EMMA FINNIGAN D.O.B: 19/02/1954	09/07/2020	007837283	MasterKey Super/Pension Fundamentals	Account Details Change		Work In Progress
JANETTE ESTHER SMITH D.O.B: 10/06/1957	13/07/2020	008293849	MasterKey Super Fundamentals	Contribution		Work In Progress
GREGORY MARK ANDREWS D.O.B: 01/01/1990	28/05/2020	084738374	MasterKey Business Super	Withdrawal Quote		Work In Progress

prev | 1 | next Show rows

Please note that MLC Insurance products will not be shown above.

Fax outstanding requirements to MLC:
For all MLC Insurance related (e.g. Wealth Protection and Life Cover) faxes, fax 1800 550 081. For everything else fax 02 9964 3334

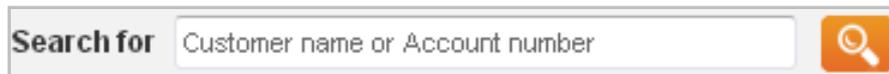
[Media centre](#) [Advice disclaimer](#) [Privacy policy](#) [Security](#) Last login: 07 Oct 2020 09:55 am

National Australia Bank Limited ABN 12 004 044 937, AFSL 230686.
MLC Limited uses the MLC brand under licence. MLC Limited is a part of the Nippon Life Insurance Group and not part of the NAB Group of Companies.

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.

A search bar with the text "Search for" on the left, a text input field containing "Customer name or Account number", and a magnifying glass icon on the right.

Search for 

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).

A navigation bar showing page numbers 1, 2, 3, 4, ..., 12, and next. It also includes a "Show" label, a dropdown menu set to "20", and the word "rows".

◀ prev | 1 | 2 | 3 | 4 | ... | 12 | next ▶ Show 20 ▼ rows

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.

All items (223) | [Action required \(15\)](#) | [For my information \(208\)](#)

You can also filter how the requests are displayed by:

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

Customer name	Date	Account	Product ▼	Work type ▼	Work update	Status ▼
			All	All		All
			MasterKey Business Super	Account Details Change		Work In Progress
			MasterKey Super Fundamentals	Contribution		
			MasterKey Super/Pension Fundamentals	Investment Strategy Change		
				Withdrawal Quote		

Viewing requests in detail

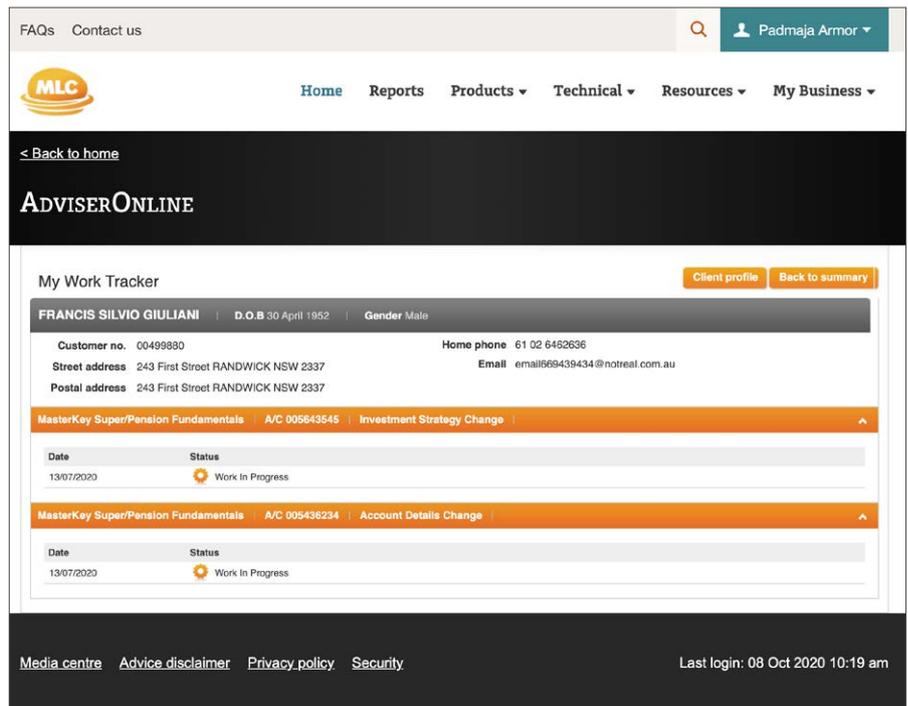
To view requests in detail, click on the work type linked to your client.

DARREN MATHEW D.O.B:	05/08/2013	55555555	MasterKey Super Fundamentals	Bank Details Update	Awaiting documentation/information	 Action Required - Adviser
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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.

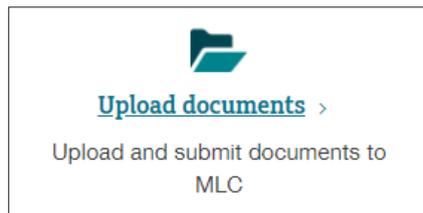


The screenshot shows the MLC AdviserOnline interface. At the top, there are navigation links for FAQs, Contact us, and a search bar. The user is identified as Padmaja Armor. The main header includes the MLC logo and navigation tabs for Home, Reports, Products, Technical, Resources, and My Business. Below this is a 'Back to home' link and the 'ADVISERONLINE' title. The 'My Work Tracker' section displays client information for FRANCIS SILVIO GIULIANI, including D.O.B (30 April 1952) and Gender (Male). It lists contact details: Customer no. 00499880, Home phone 61 02 6462636, Street address 243 First Street RANDWICK NSW 2337, and Postal address 243 First Street RANDWICK NSW 2337. Two work items are shown, both with a status of 'Work In Progress' as of 13/07/2020. The first item is 'Investment Strategy Change' for 'MasterKey Super/Pension Fundamentals' with A/C 005643545. The second item is 'Account Details Change' for 'MasterKey Super/Pension Fundamentals' with A/C 005436234. At the bottom, there are links for Media centre, Advice disclaimer, Privacy policy, and Security, along with the last login time: 08 Oct 2020 10:19 am.

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**.





Upload documents

1 Specify work details

* Indicates a mandatory field

Product *

Request type *

MLC customer name

MLC account number *

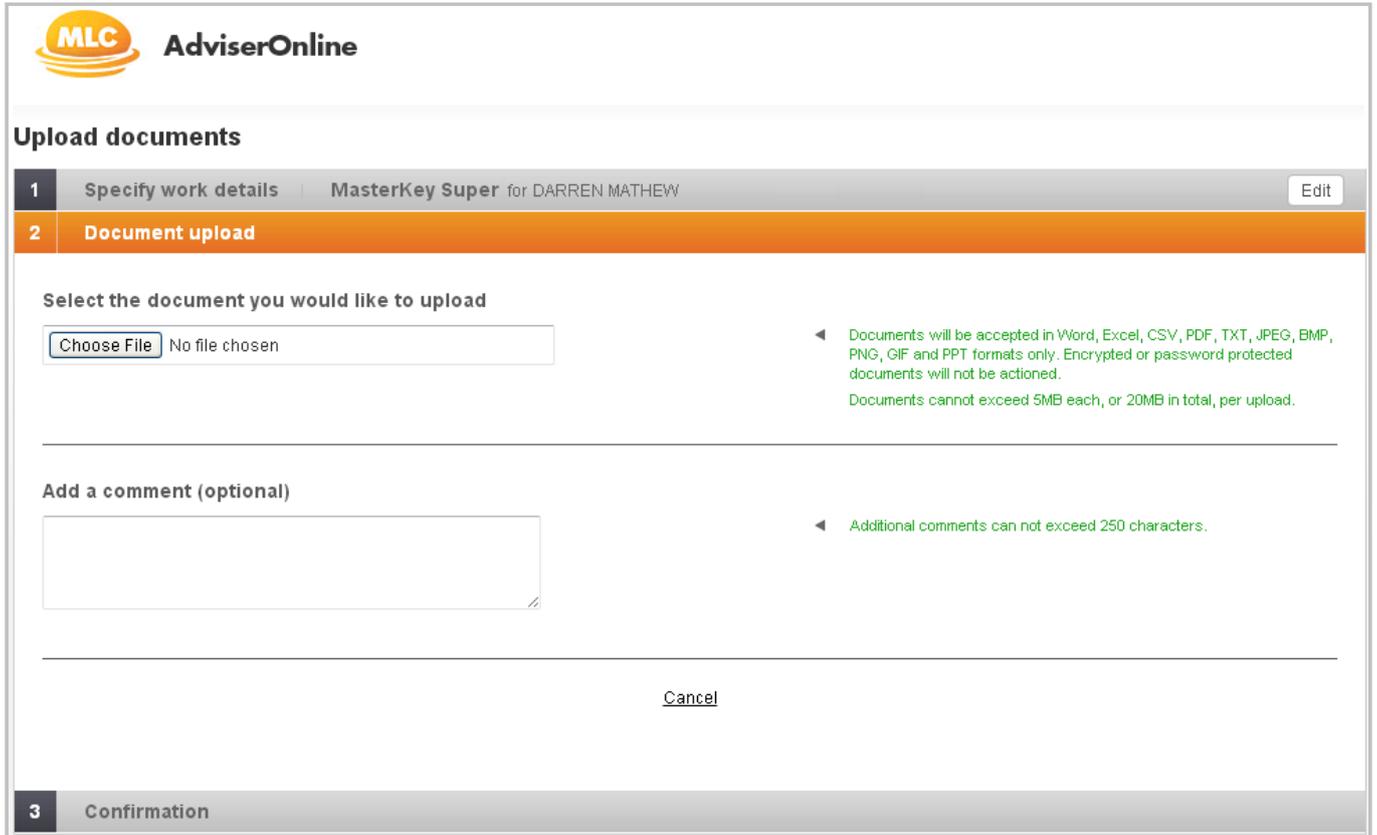
or [Cancel](#)

2 Document upload

3 Confirmation

Uploading documents

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



MLC AdviserOnline

Upload documents

1 Specify work details | MasterKey Super for DARREN MATHEW Edit

2 **Document upload**

Select the document you would like to upload

No file chosen

Documents will be accepted in Word, Excel, CSV, PDF, TXT, JPEG, BMP, PNG, GIF and PPT formats only. Encrypted or password protected documents will not be actioned.
Documents cannot exceed 5MB each, or 20MB in total, per upload.

Add a comment (optional)

Additional comments can not exceed 250 characters.

[Cancel](#)

3 Confirmation

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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NSW 2059

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mlc.com.au