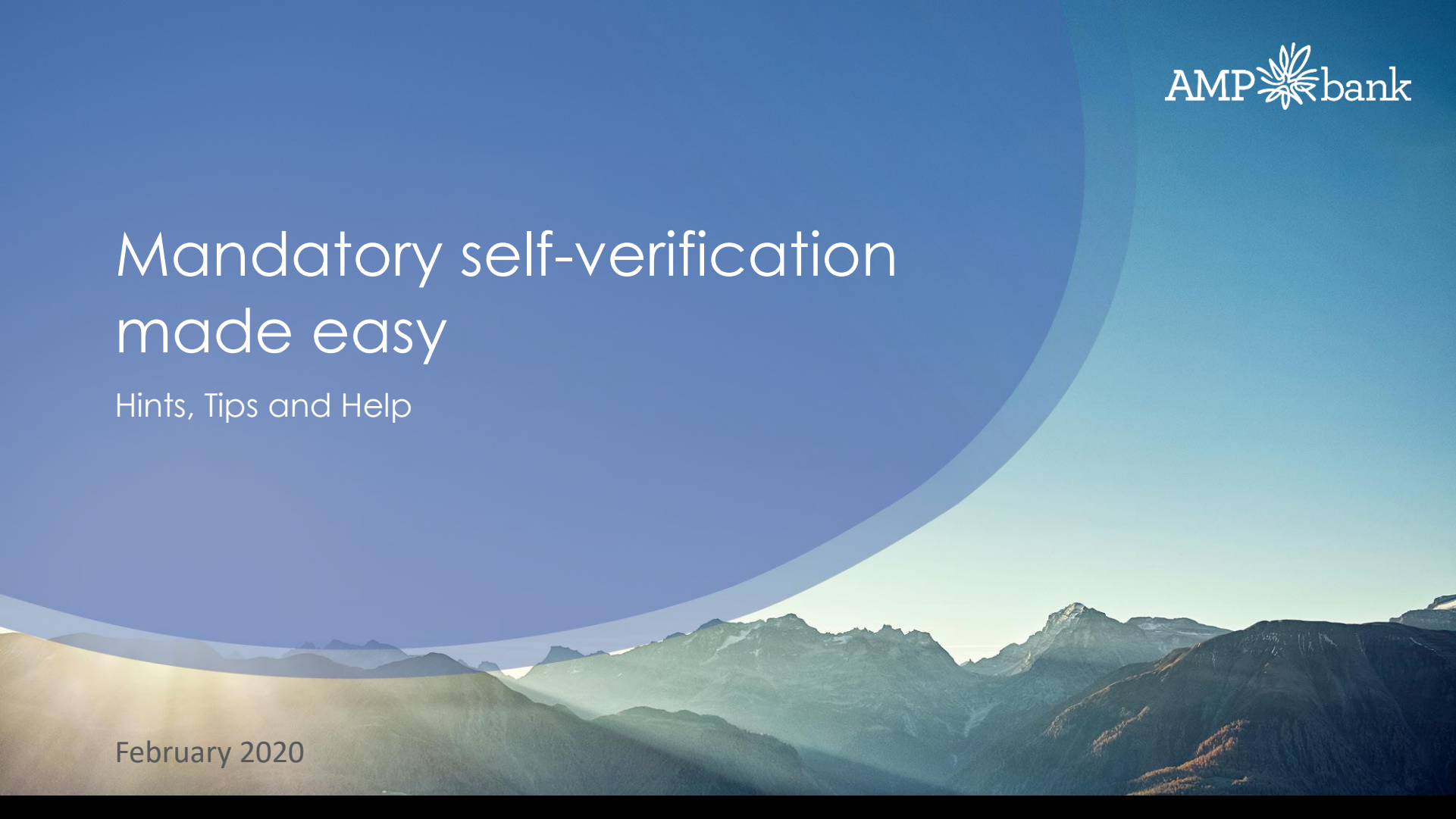
Mandatory self-verification made easy

Hints, Tips and Help



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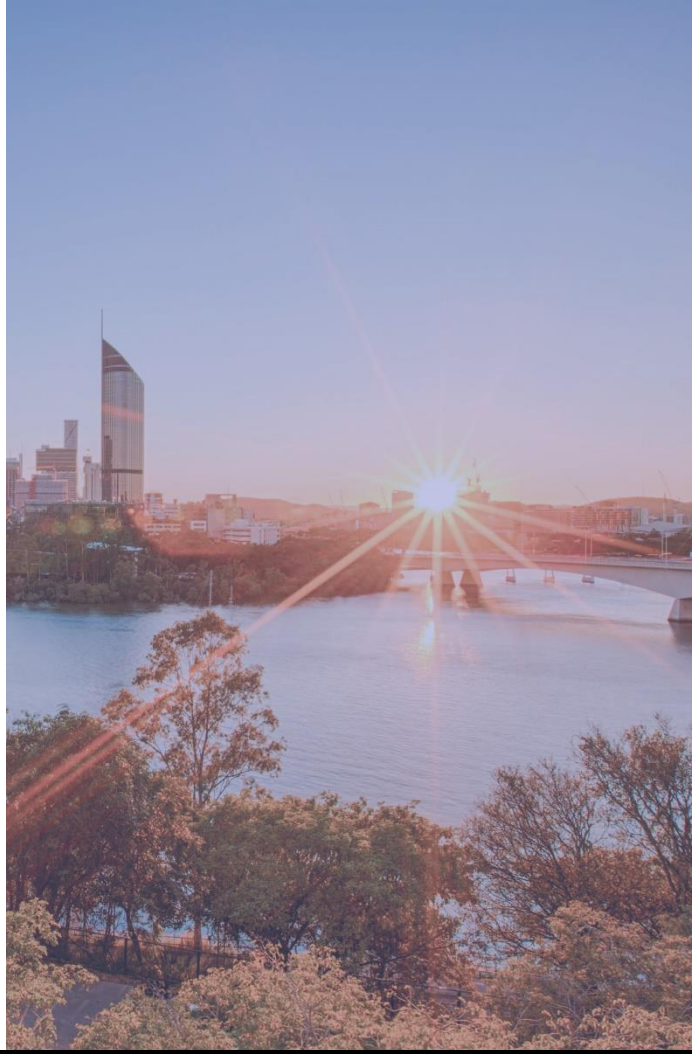
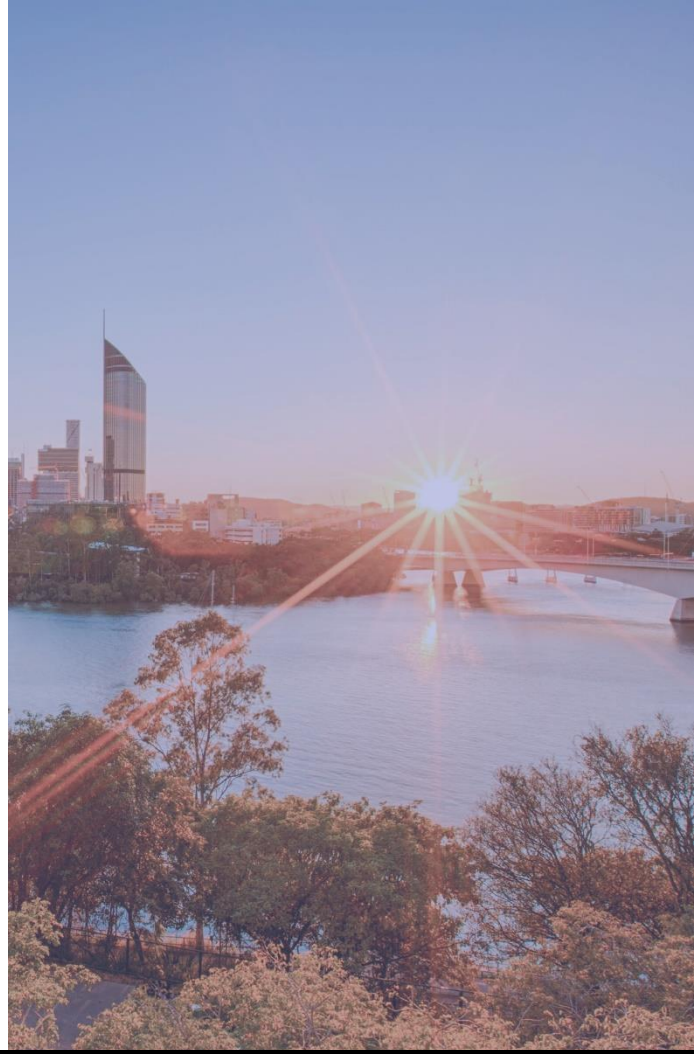


(1) Top 3 hints and tips on self-verifying correctly

1. Provide your client with AMP Bank's Supporting Documents checklist upfront so that they provide you with their documents in accordance with it
2. Make sure an uploaded document completely satisfies the specific condition. Add additional comments if you are in any doubt
3. Verify everything - more is less!



(2) Watch a quick video tutorial on how to self-verify

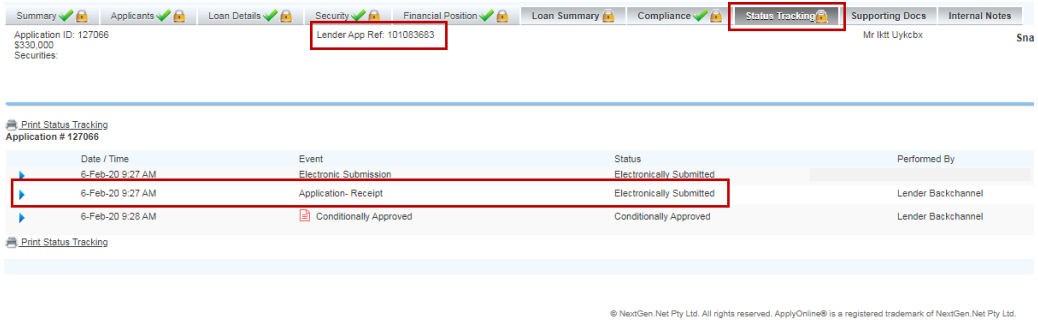
Watch this video if you are using the latest redesigned version of Supporting Docs
https://vimeo.com/334336272/70cbaf09c8

Watch this video if you are using the old version of Supporting Docs
https://vimeo.com/378400381/14c1ae67c7

(3) Things to check if you think documents are missing

I have uploaded and verified documents, but AMP Bank has not received them/or all of them. Is there somewhere I can check before escalating?

1) You should only consider an application and the associated document transfer to be submitted once you have received a lender reference number in ApplyOnline via a backchannel message, and the application status has changed to 'Application Received'. To check status updates and if a lender reference number has been received do the following:

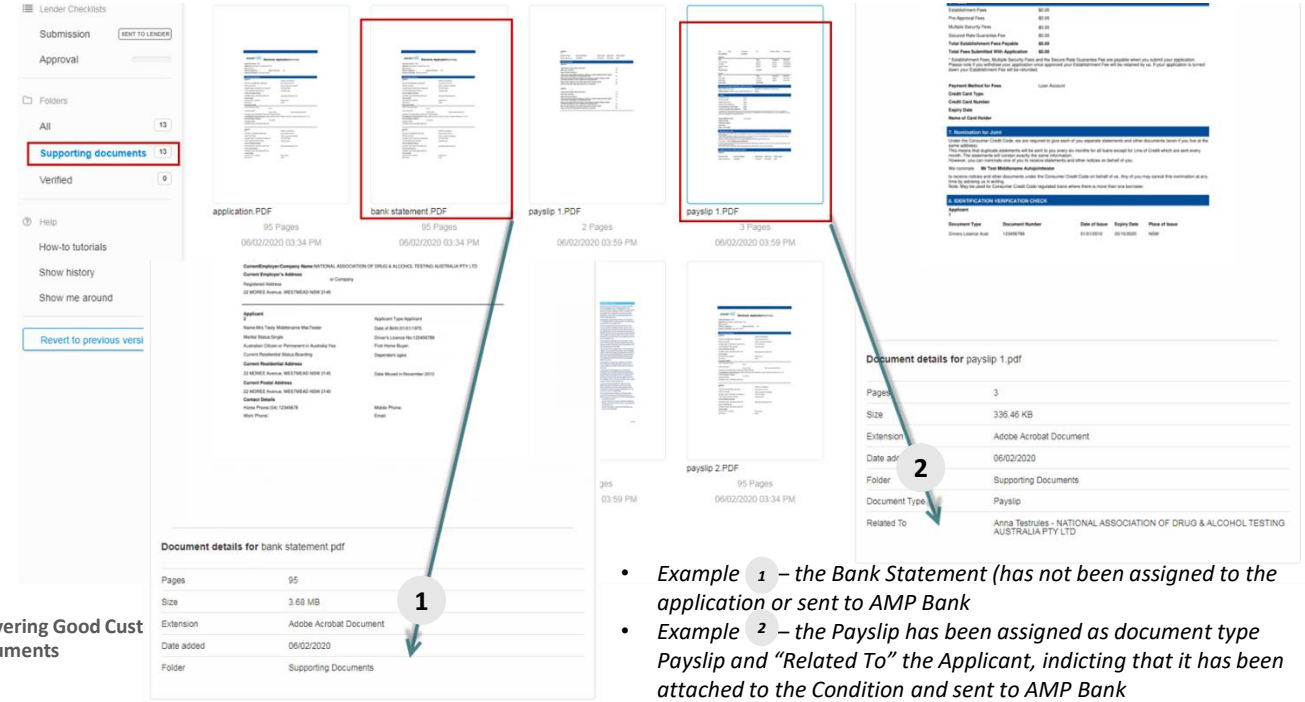


Note: *Generally, the lender reference number and status update are received within 1-2 minutes of submission, subject to lender gateway availability. If not received within 30 minutes after submission contact Aggregator Broker Support for escalation*

2) In some examples when documents have "gone missing" it can be due to users uploading documents to a submission checklist item but not all files or relevant pages within a single condition were verified. Where verification is mandatory, only verified documents and pages are sent to the lender. Click on the link below to access a video tutorial on verification tips in the supporting docs service in ApplyOnline.
   Supporting Documents Service – Verification Tips

(3) Things to check if you think documents are missing

3) Documents that are uploaded to the Supporting documents folder are not submitted to AMP Bank unless they have also been attached (and verified where applicable) against a specific condition. Do the following to check whether a Supporting Document has been attached to a Condition and sent to AMP Bank.



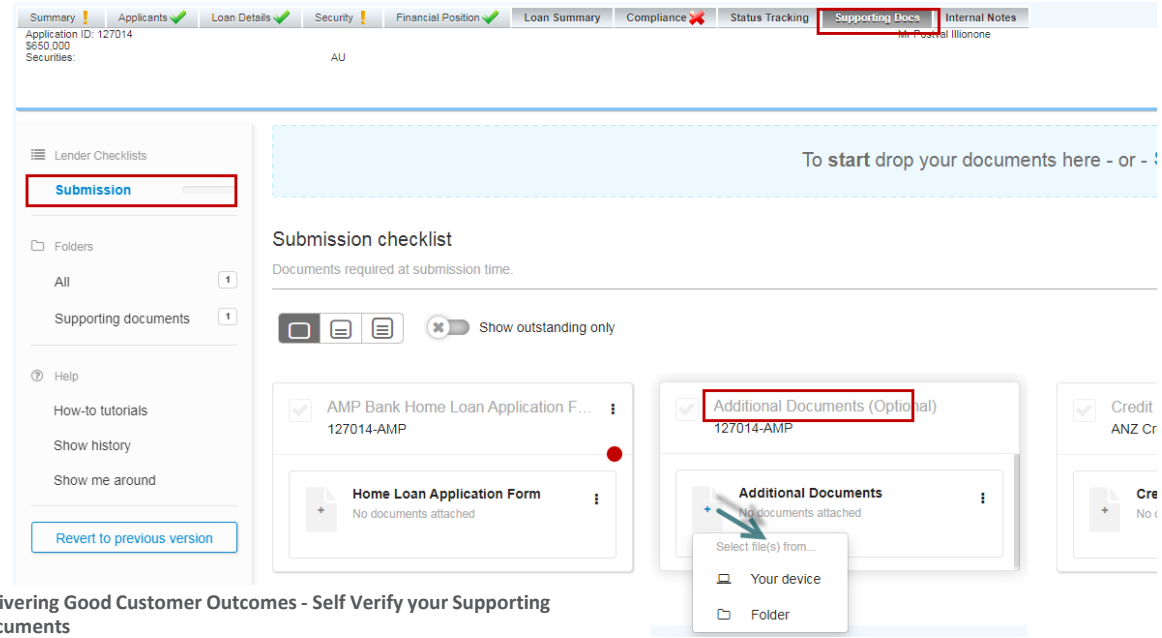
1. Select Supporting documents
2. Select document (as required)
3. Confirm document type and that the “Related To” information has been assigned

- *Example 1 – the Bank Statement (has not been assigned to the application or sent to AMP Bank*
- *Example 2 – the Payslip has been assigned as document type Payslip and “Related To” the Applicant, indicting that it has been attached to the Condition and sent to AMP Bank*

(4) Submitting additional documents

How do I add additional documents, not requested by AMP Bank prior to submission?

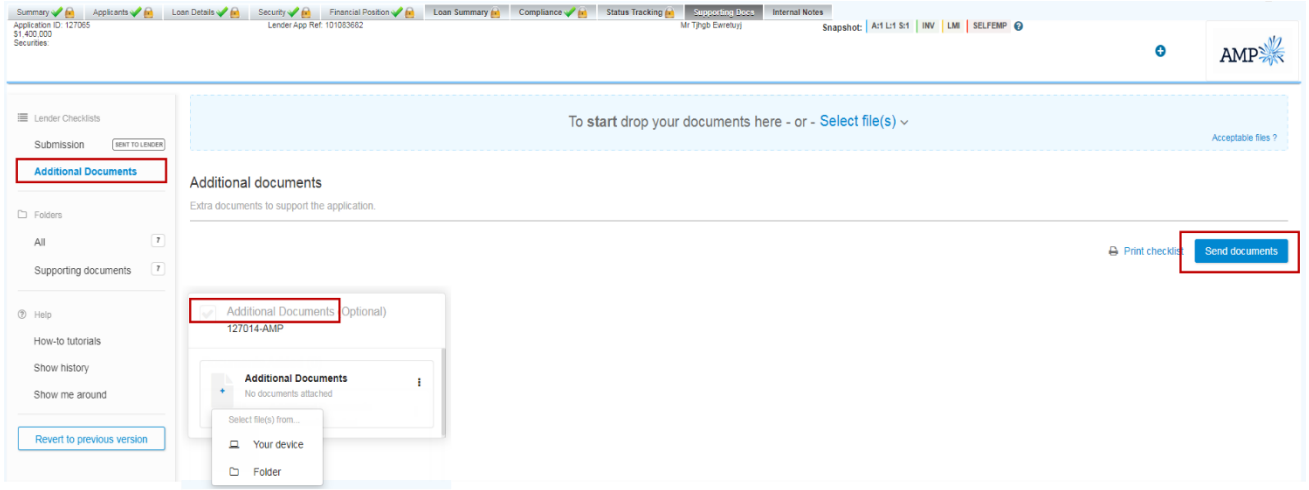
You can add documents, in addition to those requested by AMP Bank, in the Supporting Docs submission checklist by performing **steps 1-3:**



1. Click on the “+” within the Additional Documents (Optional) card
2. Select file location from dropdown menu
3. Wait while the document is uploaded to the card

(4) Submitting additional documents

How do I add additional documents, requested by AMP Bank, after application submission?

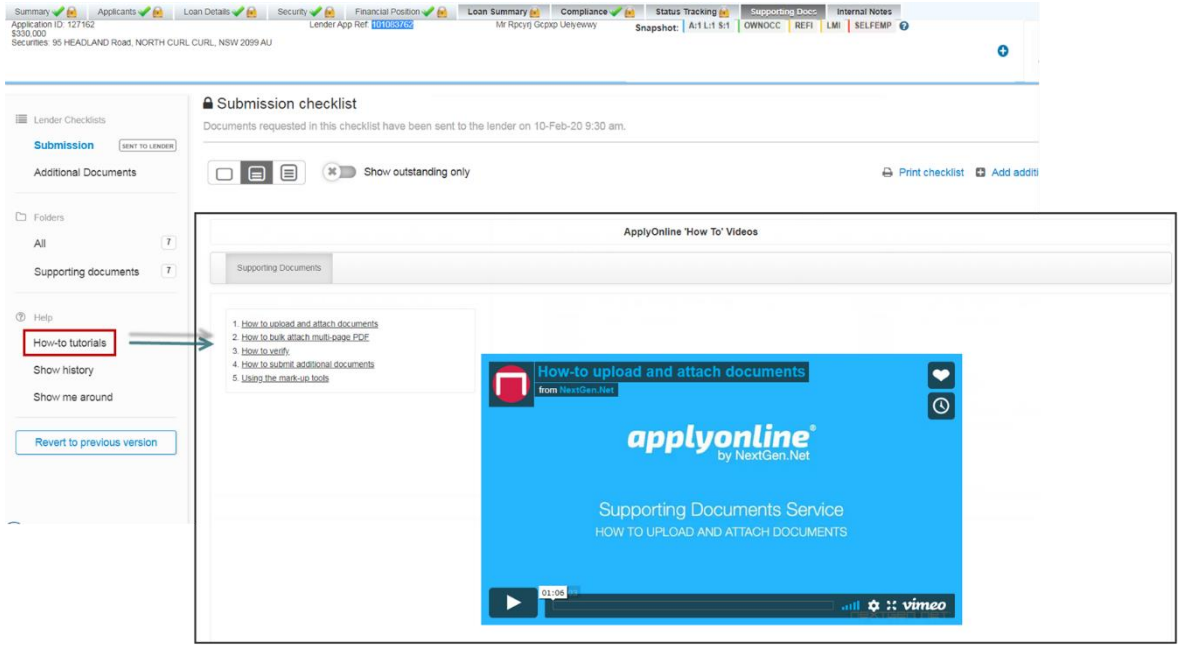


1. Select additional documents
2. Upload / drop documents
3. Wait while the document is uploaded to the card
4. Select Send Documents

(5) Escalation and other sources of help

Where else can I find help?

- For more help, in the Supporting Docs tab click 'Help' --> How To Tutorials:



- Also the **AMP Bank Distributor Centre** has helpful User Guides, Tutorials and Frequently Asked Questions: www.amp.com.au/distributor/applyonline.

(5) Escalation and other sources of help

What do I do next if none of these resources has resolved my question?

If you use your Aggregators CRM system and your question is TECHNICAL in nature e.g.
A system error message
Screen or application freezes
Documents won't attach
"Submitted" documents have disappeared
Please Contact
Aggregator Broker Support

If your question is PROCESS or POLICY in nature e.g.
You're unsure which documents are mandatory
You're unsure about how to self-verify documents
You want to check your application status
You have a question about an AMP Bank policy or procedure
Please Contact
AMP Originator hotline **1300 300 400** **Available from 9am–7pm Monday-Friday EST**

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