

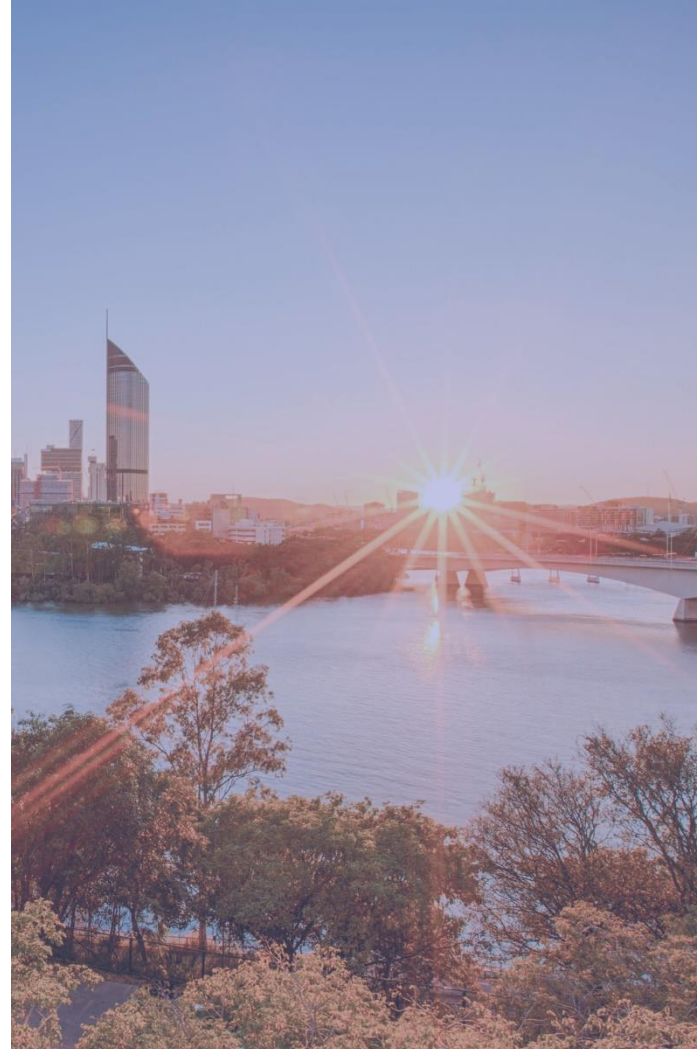
Mandatory self-verification made easy

Hints, Tips and Help

February 2020

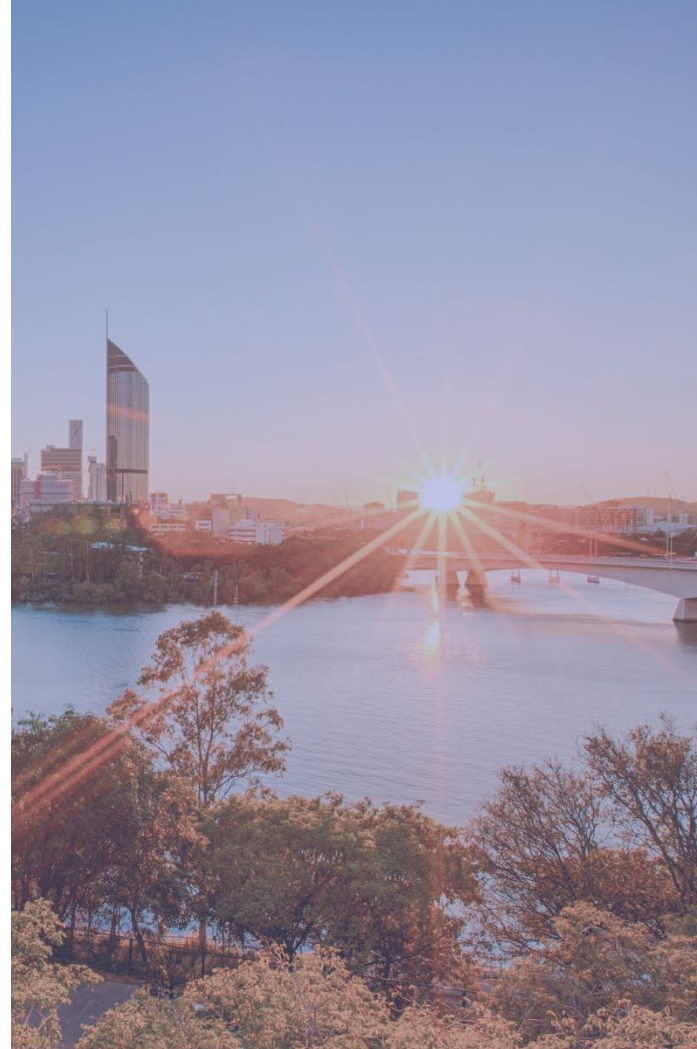
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(1) Top 3 hints and tips on self-verifying correctly

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:

Summary Applicants Loan Details Security Financial Position Loan Summary Compliance **Status Tracking** Supporting Docs Internal Notes

Application ID: 127066
\$330,000
Securities:

Lender App Ref: 101083683 Mr Iktt Uykzbr Sna

[Print Status Tracking](#)
Application # 127066

Date / Time	Event	Status	Performed By
6-Feb-20 9:27 AM	Electronic Submission	Electronically Submitted	
6-Feb-20 9:27 AM	Application Receipt	Electronically Submitted	Lender Backchannel
6-Feb-20 9:28 AM	Conditionally Approved	Conditionally Approved	Lender Backchannel

[Print Status Tracking](#)

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](#)

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(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.

The screenshot shows a document management system interface. On the left, a sidebar contains 'Lender Checklists' with 'Submission' and 'Approval' buttons, a 'Folders' list with 'Supporting documents' highlighted, and a 'Help' section. The main area displays a grid of document thumbnails. Two thumbnails are highlighted with red boxes: 'bank statement PDF' and 'payslip 1 PDF'. Arrows point from these thumbnails to detailed document views. The 'bank statement PDF' view shows document details: 95 Pages, 3.68 MB, Adobe Acrobat Document, dated 06/02/2020, in the Supporting Documents folder. The 'payslip 1 PDF' view shows document details: 3 Pages, 336.46 KB, Adobe Acrobat Document, dated 06/02/2020, in the Supporting Documents folder, with a 'Related To' field containing 'Anna Testrules - NATIONAL ASSOCIATION OF DRUG & ALCOHOL TESTING AUSTRALIA PTY LTD'. A 'Document details for bank statement.pdf' table is also visible at the bottom left.

Document Type	Document Number	Date of Issue	Expiry Date	Place of Issue
Document Type	Document Number	Date of Issue	Expiry Date	Place of Issue

Document details for bank statement.pdf	
Pages	95
Size	3.68 MB
Extension	Adobe Acrobat Document
Date added	06/02/2020
Folder	Supporting Documents

Document details for payslip 1.pdf	
Pages	3
Size	336.46 KB
Extension	Adobe Acrobat Document
Date added	06/02/2020
Folder	Supporting Documents
Document Type	Payslip
Related To	Anna Testrules - NATIONAL ASSOCIATION OF DRUG & ALCOHOL TESTING AUSTRALIA PTY LTD

Delivering Good Cust Documents

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, indicating 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:

The screenshot shows the AMP Bank loan application interface. The top navigation bar includes tabs for Summary, Applicants, Loan Details, Security, Financial Position, Loan Summary, Compliance, Status Tracking, Supporting Docs (highlighted in red), and Internal Notes. The main content area displays a 'Submission checklist' with a 'Supporting documents' section. A dropdown menu is open for the 'Additional Documents (Optional)' card, showing options to select files from 'Your device' or a 'Folder'.

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?

The screenshot displays the AMP Bank application portal. The top navigation bar includes tabs for Summary, Applicants, Loan Details, Security, Financial Position, Loan Summary, Compliance, Status Tracking, Supporting Docs, and Internal Notes. The main content area is titled 'Additional Documents' and contains a large blue box with the text 'To start drop your documents here - or - Select file(s)'. Below this, there is a section for 'Additional documents' with the subtext 'Extra documents to support the application.' A 'Send documents' button is highlighted with a red box. A modal window is open, showing a file selection process with options like 'Your device' and 'Folder'.

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:

The screenshot displays the 'ApplyOnline How To Videos' interface. On the left sidebar, the 'Help' section contains a red-bordered link for 'How-to tutorials', which is highlighted by a red box and an arrow pointing to the video player. The main content area shows a list of tutorial topics: '1. How to upload and attach documents', '2. How to bulk attach multi-page PDF', '3. How to verify', '4. How to submit additional documents', and '5. Using the mark-up tools'. The video player displays the title 'How to upload and attach documents' from NextGen.Net, with the 'applyonline by NextGen.Net' logo and the text 'Supporting Documents Service HOW TO UPLOAD AND ATTACH DOCUMENTS'. The video player controls show a play button and a 01:06 duration.

- 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

