# North

### Activity Management Frequently asked questions | September 2023

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#### 1. Can I filter by status within activity management?

Yes, you can click on the status you would like to view to quickly filter. You will be able to view all status within the activity management page.

North Home Clients+ Bulk transacting+ Activities	Reporting- Investment information+	Products+ Support+ Access+		ୟ ଅେ (+ Logou
Activities				
Activity management Model activity management	Upload forms			
✓ Filters      ✓     Clent name, clent number, account	unt number or activity reference number			Search
Search results Showing all activities (including activities completed in the last	t 6 months)			
Filter by status				
286	Not submitted	98	Expiring soon	Completed
		~		

#### 2. Is there an advanced filter/search function available?

Yes, you can apply an advanced filter by status, activity type, last updated, created by and adviser. Or search by client name, client number, account number or reference number.

North Home Clients- Bulktarizacting- Activities- Reporting- Investment Information- Products- Support- Access-						
Activities						
Activity management Model activity Upload form	ng					
<b>⊽ Fitters</b> ^ Search by client name						
Activity type	Created by Save 🕥	Adviser Save 🗍				
(A3) V	(AI) V	(AII)				
Activity status	Last updated	Reference number				
(AI)	Pesse select V	Please encer reference number				
Account number	Client number					
Please enter account number	Please enter client number					
Reset all filters 🗘		Close Apply filters				
		/				
Security results Showing all activities (including activities complexed in the last 30 degs)						
Filter by status						
All Not submitted	In progress	Expiring soon Completed				
12 0	2	0 10				

3. How do I easily view the status of a case within the activity management screen? You can hover over the progress bar and a pop up box will appear showing the activity status.

							Search
		In progress	Expiring soon				
					In progress		
	Product type	Account type	Status	Proj	Created on 17 Jul 2023 Submitted on 31 Jul 2023 (417 days ago)	View details	
yvhbąkh Ujyy	MyNorth	Super	In progress	-	•	<b>•</b>	

#### 4. How do I stay up to date with the end-to-end status of a case?

You will be able to access the activity status of each activity, including, status, key dates, and a progress bar providing detailed end to end progress of an activity's lifecycle. Providing a transparent view of the status of the case.

Activity management	Model activity management	Upload forms		
External asset trans	fer in - North Personal St	perannuation		
Details				
lient name	Ahi	uc Ugfwht Tjfmvwby	Created	31 Aug 2024
dviser	K] I	KAMEA KÎ CÎLCEGAMA DÎK	Submitted	31 Aug 2024
eator	KJ I	NALA KI CITOLONNADIK		
ference				
atus	in ;	ogress 🙍		
atus activity status	in j	april a	 Activity log	
ctivity status	ing	aprata a	 Activity log There are currently no notes on this a	eting.
ctivity status Completed Processing 31 Aug 2024	ing	aprata a ]	 Activity log There are currently no notes on this a	ctivity.
Ctivity status Completed Processing 31 Aug 2004 Asset transfer in (in	ing nageciej is in progress.		Activity log There are sumently no notes on this a	eskily,
Clivity status Completed Completed Processing Processing Social Status S	ng		Activity log	etivity.

#### 5. How are activity status details displayed in Activity Details?

A status field in Activity Management will be populated. Dot to the right of Status field will indicate the activity status/progress.

Activity manag	ement	Model activity management	Upload
< Switch Tra	nsaction	North Personal Supera	nnuation
Details			
Client name	Ahbhu	uc Uqfvwht Tjfmvwby	
Adviser	KJ FJKY		
Reference	14961	9547	
Status	In proj	gress	
	Activity manage < Switch Trop Details Client name Adviser Creator Reference Status	Activity management Switch Transaction Details Client name Abblu Adviser KJ FJKU Creator KJ FJKU Reference 14951 Status In pro	Activity management     Model activity management       < Switch Transaction

#### 6. What are the different progress steps in the activity status?

١	Step has paused and description box will display the 'diarised reason'.
•	Expired or cancelled.
$\bigcirc$	Current 'active' step has commenced but not yet completed.
Ó	Upcoming step and has not yet been actioned.
	Completed step.

#### 7. Can I see notes as part of the activity status?

Yes, all notes present on an activity will be visible within the Activity Log section of the activities details. Step by step descriptions will also be available within the Activity Status progress bar.

Details			
Client name	Ahkke Mąbmrwybąfm	Created	22 Sep 2024
Adviser	NBWLTHC UWBYQK	Request sent	22 Sep 2024
Creator	LWIQL NWBXOOQ	Expiry date	06 Oct 2024
Reference			
Status	in progress 😐		
Activity status Complexed Processing Response received 22 Sep 2028 The signal content request has been sent t Response sent Response sent 22 Sep 2024 Creased 22 Sep 2024 Creased 22 Sep 2024	o the client. Availong client response.	Activity log 22090301 The digat care via the North make app. No	en request has been sent by Luid) Nabacoa to Abbic Mgamwybęfm via email to nh Gwine or by clicking on the link in the email. The consent is due by 66/10/2024

#### 8. When a request has been created but not submitted, how long until it expires?

A request that has been in Save To Resume state (Not Submitted) for more than 90 calendar days will automatically expire, i.e., expires at the end of the 90th calendar day. These requests will appear in the Expiring Soon filter 2 weeks before the 90th calendar day. These will be displayed in both the Not Submitted and Expiring Soon filters.

#### 9. What happens when a case is expired?

If an activity has been in Save To Resume state for more than 90 days, it will expire and close. You will need to create and submit a new activity.

#### 10. Can I re-activate a case?

Save to resume activities can be closed by you or automatically expires after 90 days. If a case needs to be re-activated, you will need to call North Service Centre to request for the case to be re-opened. However, if deemed that the case needs to be submitted, then you will need to create a new activity.

#### 11. What support material is available for advisers?

A <u>short video</u> on activity management is available on North Online > Support > Training videos.

#### 12. Need more information?

Please reach out to your Business Development Manager.

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Quick Reference Guide - Activity Management September 2023

#### **Activity Management**

#### Enhancing transparency with a new progress bar – activity status feature

A **new Activity Status section** will display more information on the status and progress of service requests by showing a visual representation of the end-to-end process steps for each request and the progression to completion.

Every step will be time stamped and will have a custom description to further enrich the information visible to users.

			View all accounts	Transaction history	Statements & correspondence	Reports	Client details*	Activities *		
Activity management	Upload forms									
C Bank details con	sent request									
Details										
Client name		Ahkke Mąbmniejbąłm				Created		22 Sep 2024		
Adviser		NEW/THC UWERQK				Request sevit		22 Sep 2024		
Reference						Response received		22 Sep 2024		
Status		Completed ●				Completed		22 Sep 2024		
Completed 22 Sep 2024 The sigital con Processing 22 Sep 2024	sent request has been appro	wd and the request has been compleme	L			2209-224 The digital of 2209-224 The digital of Via the North-mobile app	nnent request has been approv nnent request has been sent by or by dioking on the link in the e	ed. Luniqi Nuuburooq to Ahkke Mighimnuy mail, The consent is due by 06/10/2	bolm «la emai to punee, juuree φerg.com.au. Τ Ο24.	his is availing your action. You can
22 Sep 2024										
22 Sep 2024										

#### Activity status - progress steps

Initiated online	System initiated	Initiated manually	Digital consent
Adviser/support staff or client initiated the activity in North Online	North system initiated the activity	NSC manually initiated the activity	Digital consent request activity was initiated by an adviser/support staff
Step 4     Completed       Step 3     Processing       Step 2     Submitted       Step 1     Created	Step 3 Completed Step 2 Processing Step 1 Created	Step 4     Completed       Step 3     Processing       Step 2     Assigned       Step 1     Created	Step 5     Completed       Step 4     Processing       Step 3     Response received       Step 2     Request sent       Step 1     Created



Step has paused and description box will display the 'diarised reason'.

Expired or cancelled.

Current 'active' step has commenced but not yet completed.

Upcoming step and has not yet been actioned.

Completed step.

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Advisers can hover over the progress bar and a hover box displays the highlevel status (e.g., not submitted, in progress, complete, expired and cancelled) and date information (when a case was created, submitted, completed, cancelled, or expired).

#### **Progress bar**



	Created
	Submitted
	Processing
	Completed
•	Expired / Cancelled
•	Assigned (manually initiated cases only)
	Completed (Approved) / Completed (Declined) for digital consent request cases
	Expired / Cancelled for digital consent request cases

Status field will have the coloured dot to Model activity the right of the field to indicate one of the Activity management Upload management following statuses: Switch Transaction North Personal Superannuation In progress Details Completed **Client** name Ahbhuc Uqfvwht Tjfmvwby Cancelled Adviser KJ FJKYWFY KJ GJTQFQYWYQJK Creator KJ FJKYWFY KJ GJTQFQYWYQJK Expired Reference 149618547 Expiring soon Status In progress



If the case is 'In progress' when the case is 'Expiring soon', then 'Expiring soon' will be displayed.