OLDMUTUAL

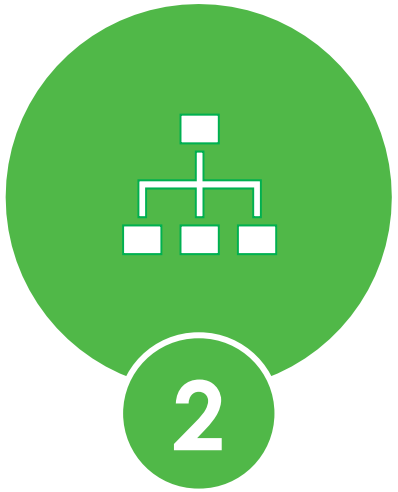
MYCLAIM EMPLOYEE
STEP-BY-STEP GUIDE

DO GREAT THINGS EVERY DAY

HOW TO SUBMIT YOUR EXIT CLAIM ON MYCLAIM – an overview

LOG IN VIA THE OLD MUTUAL WEBSITE

Log in or **Register** on the Old Mutual website by clicking **HERE.**



ACCESS MYCLAIM

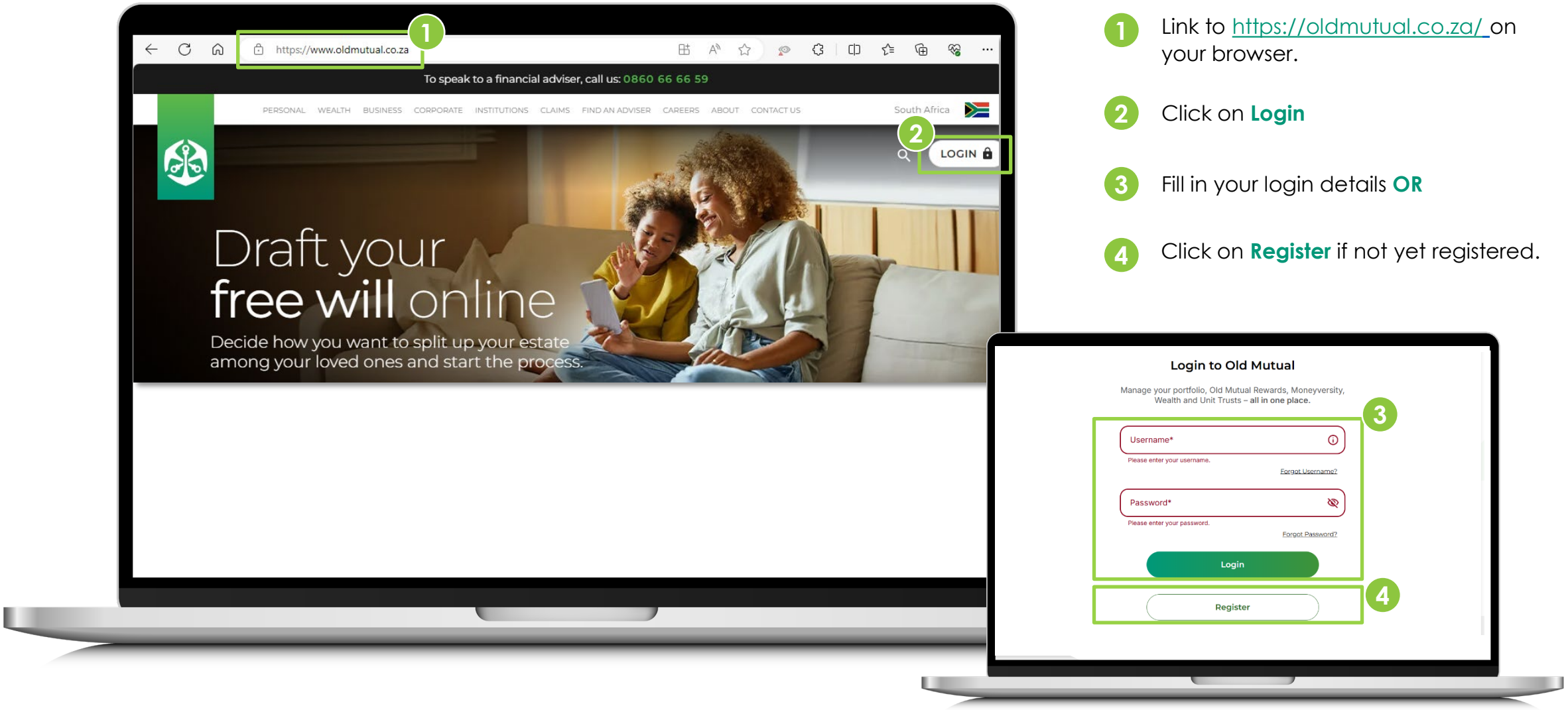
Access the claims system – **MyClaim** system

COMPLETE AND SUBMIT THE ONLINE FORM

- Complete your personal details
- Complete your claim details
- Provide supporting material
- Accept the terms and conditions and submit the claim for Employer Confirmation

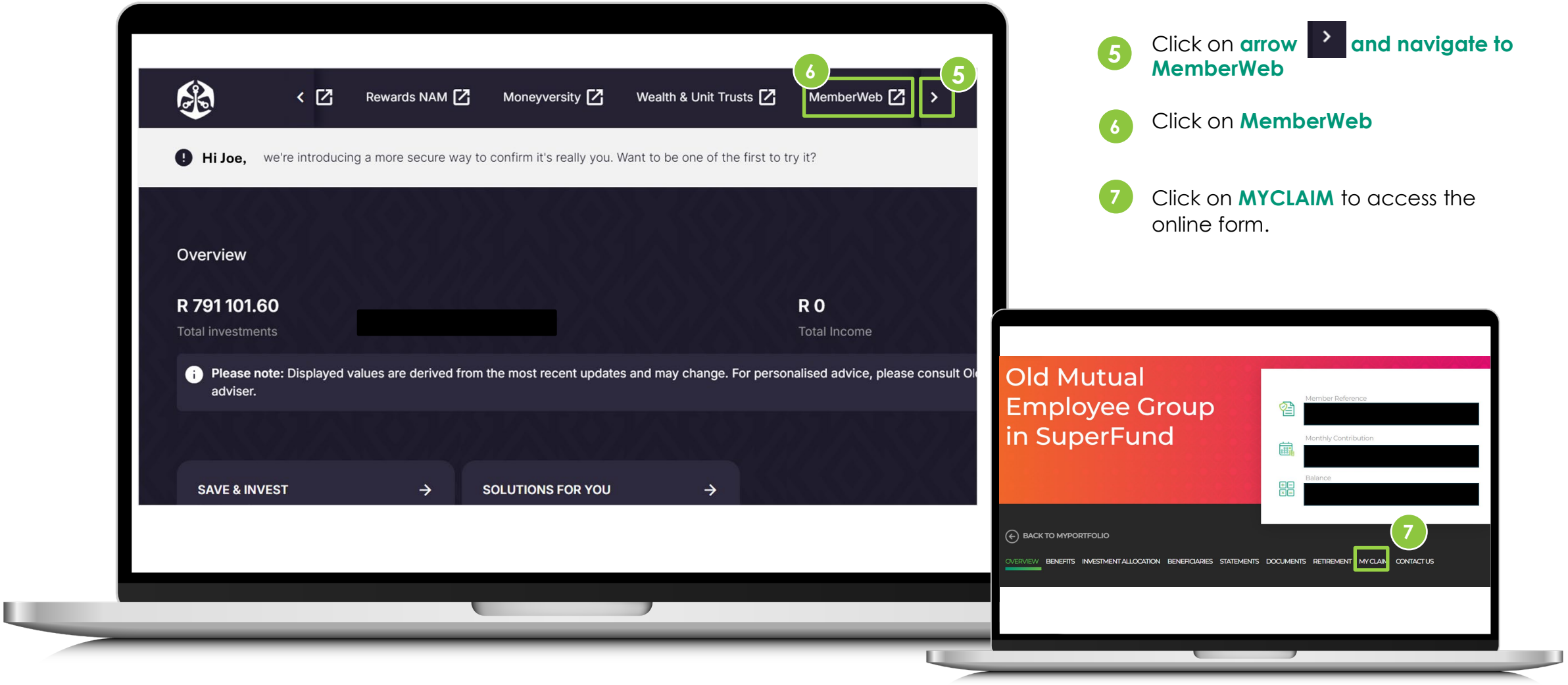
This is a one-page quick reference guide. A detailed step-by-step guide follows.

QUICK REFERENCE GUIDE



1. Link to https://oldmutual.co.za/ on your browser.
2. Click on **Login**
3. Fill in your login details **OR**
4. Click on **Register** if not yet registered.

QUICK REFERENCE GUIDE

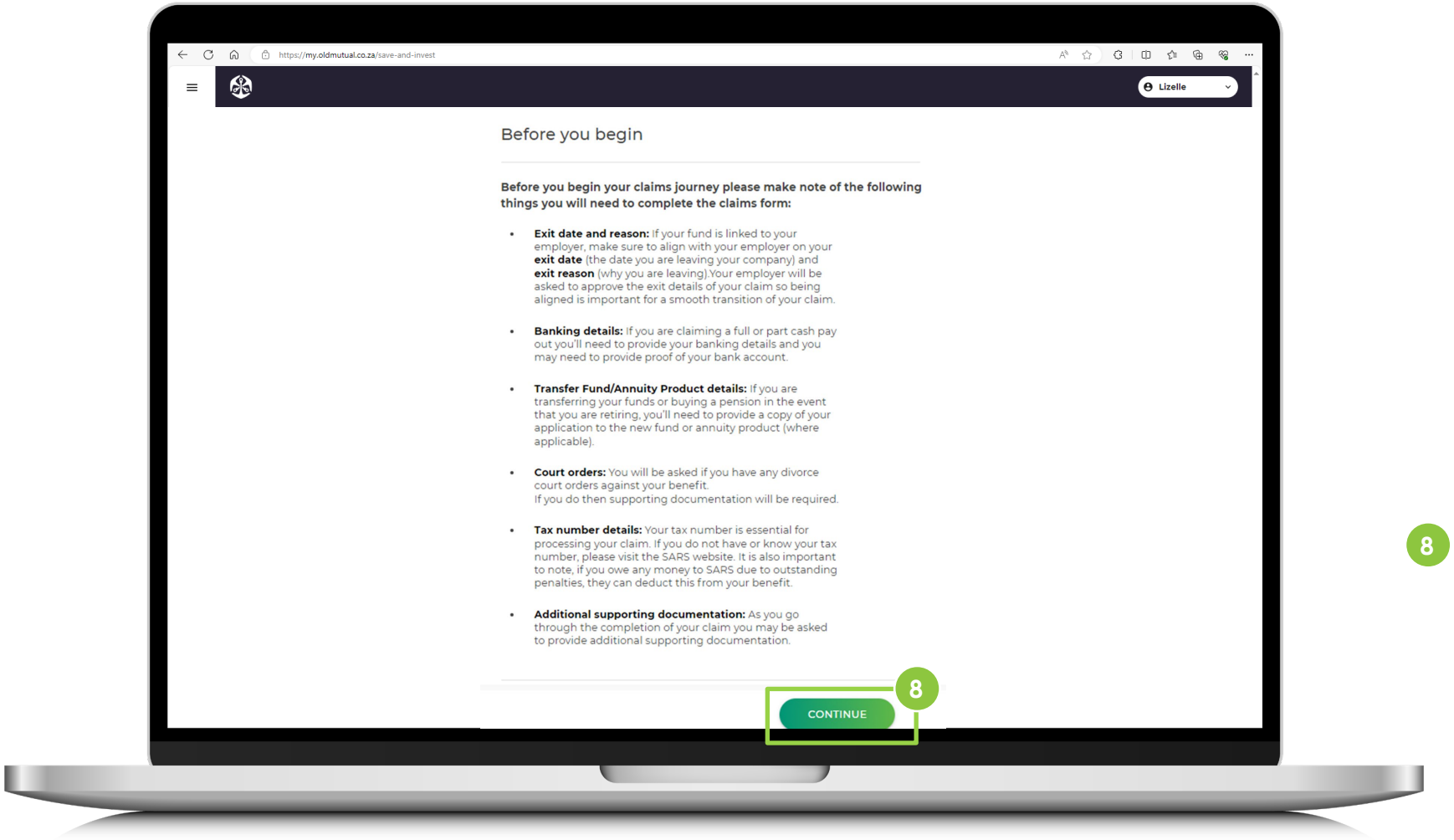


5 Click on **arrow** › **and navigate to MemberWeb**

6 Click on **MemberWeb**

7 Click on **MYCLAIM** to access the online form.

QUICK REFERENCE GUIDE

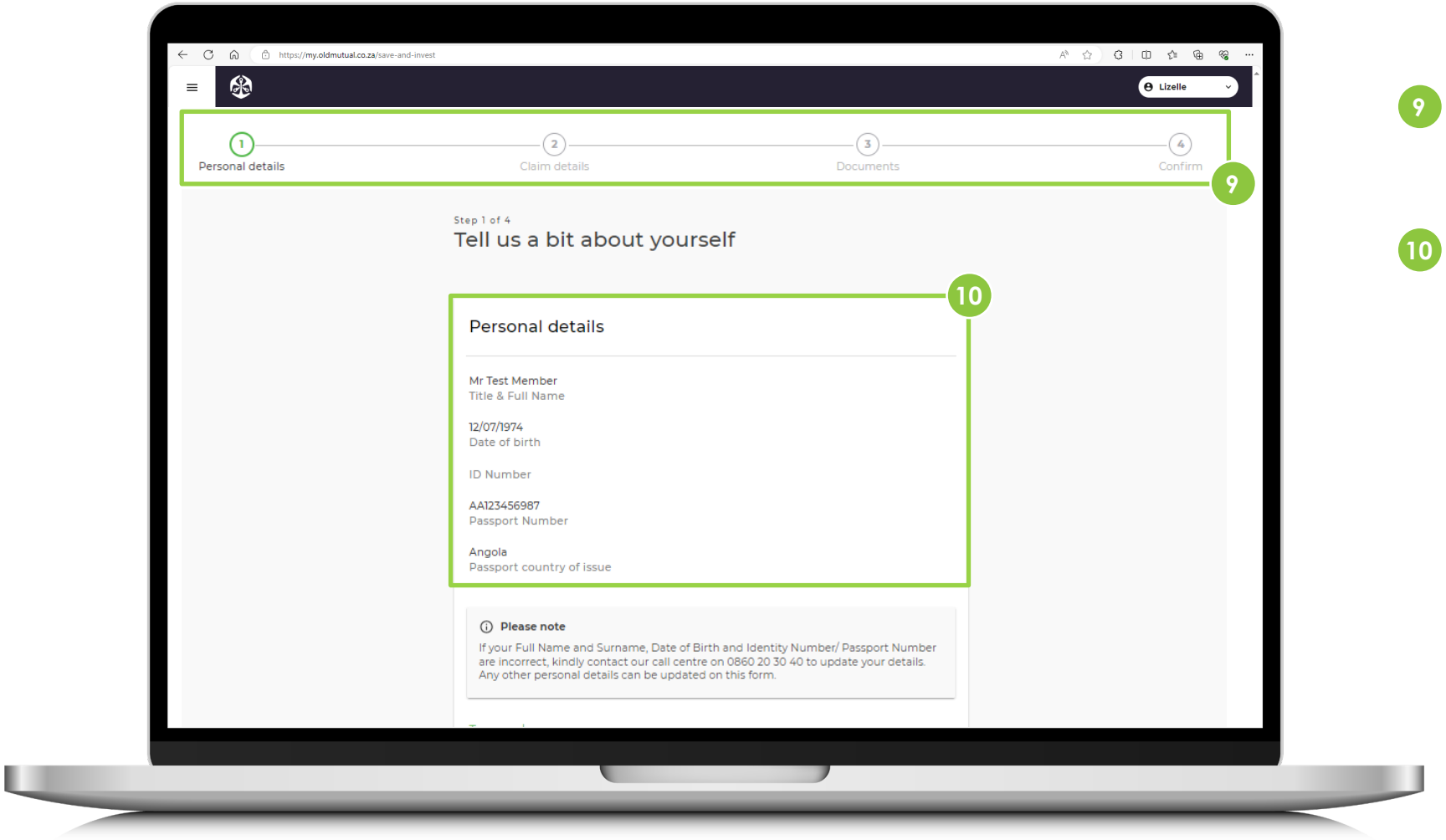


NOTE: Before commencing the claims journey, ensure that you read the details displayed on this screen carefully and ensure that you have all the relevant information and documents to continue.

You are encouraged to engage with a Financial Adviser before completing the claim form.

8 Click **CONTINUE** to start completing the online form.

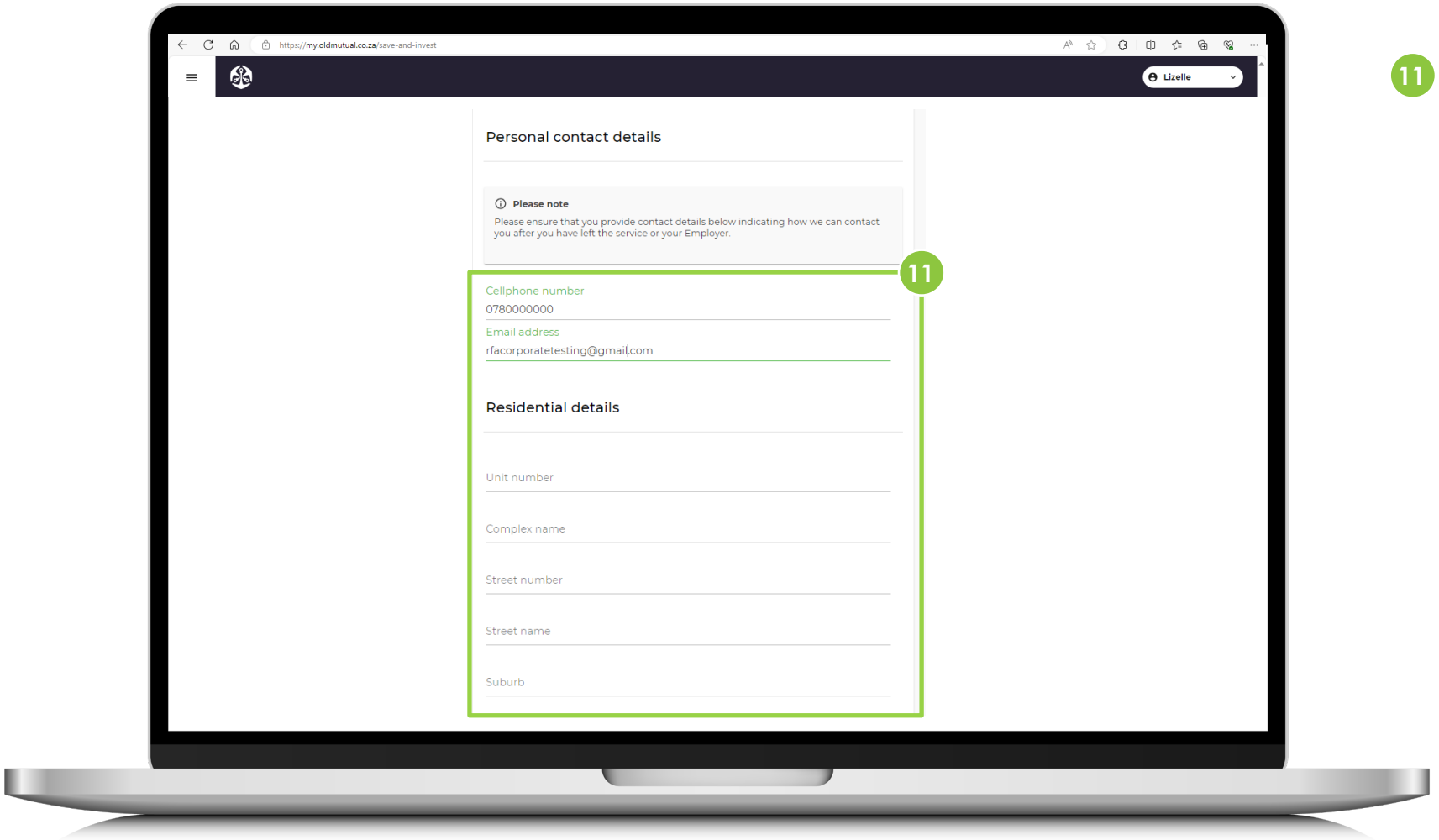
QUICK REFERENCE GUIDE



9 The progress bar shows you the steps you have completed and what is outstanding.

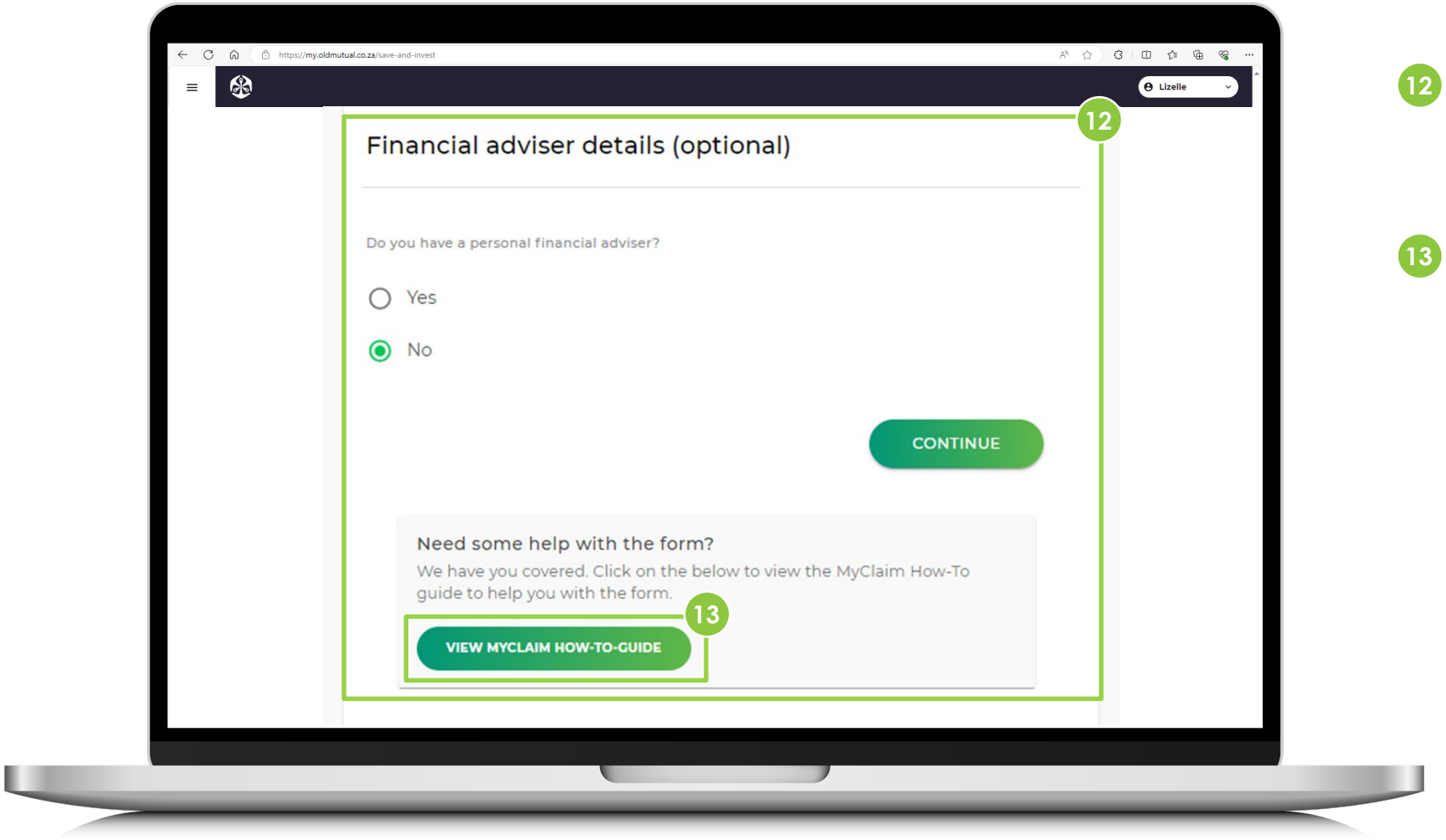
10 **"Personal Details"** form is prepopulated with available information.

QUICK REFERENCE GUIDE



11 Complete any missing information.

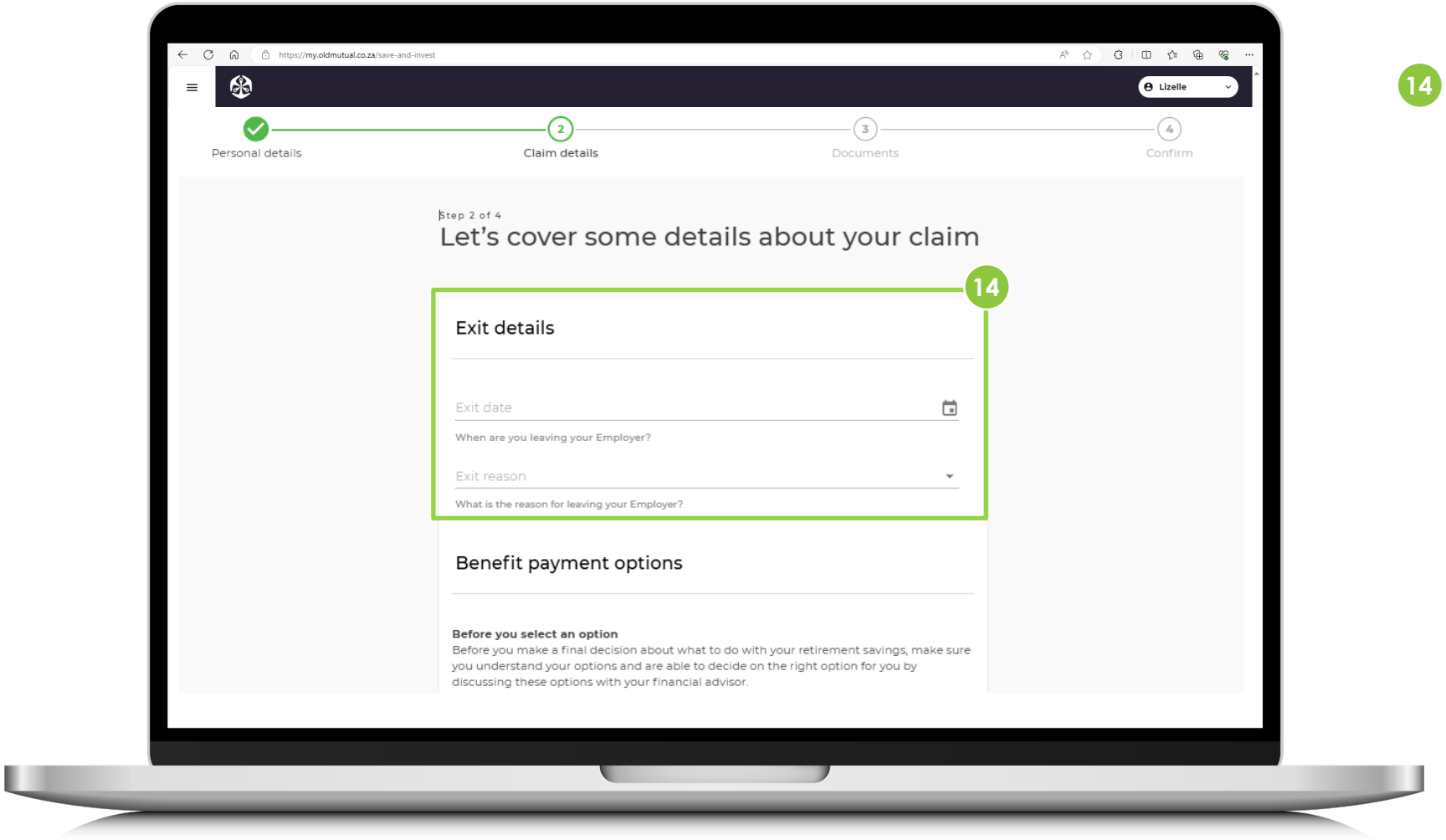
QUICK REFERENCE GUIDE



12 **NOTE!** If you have a financial adviser, you can capture their details by selecting **Yes.**

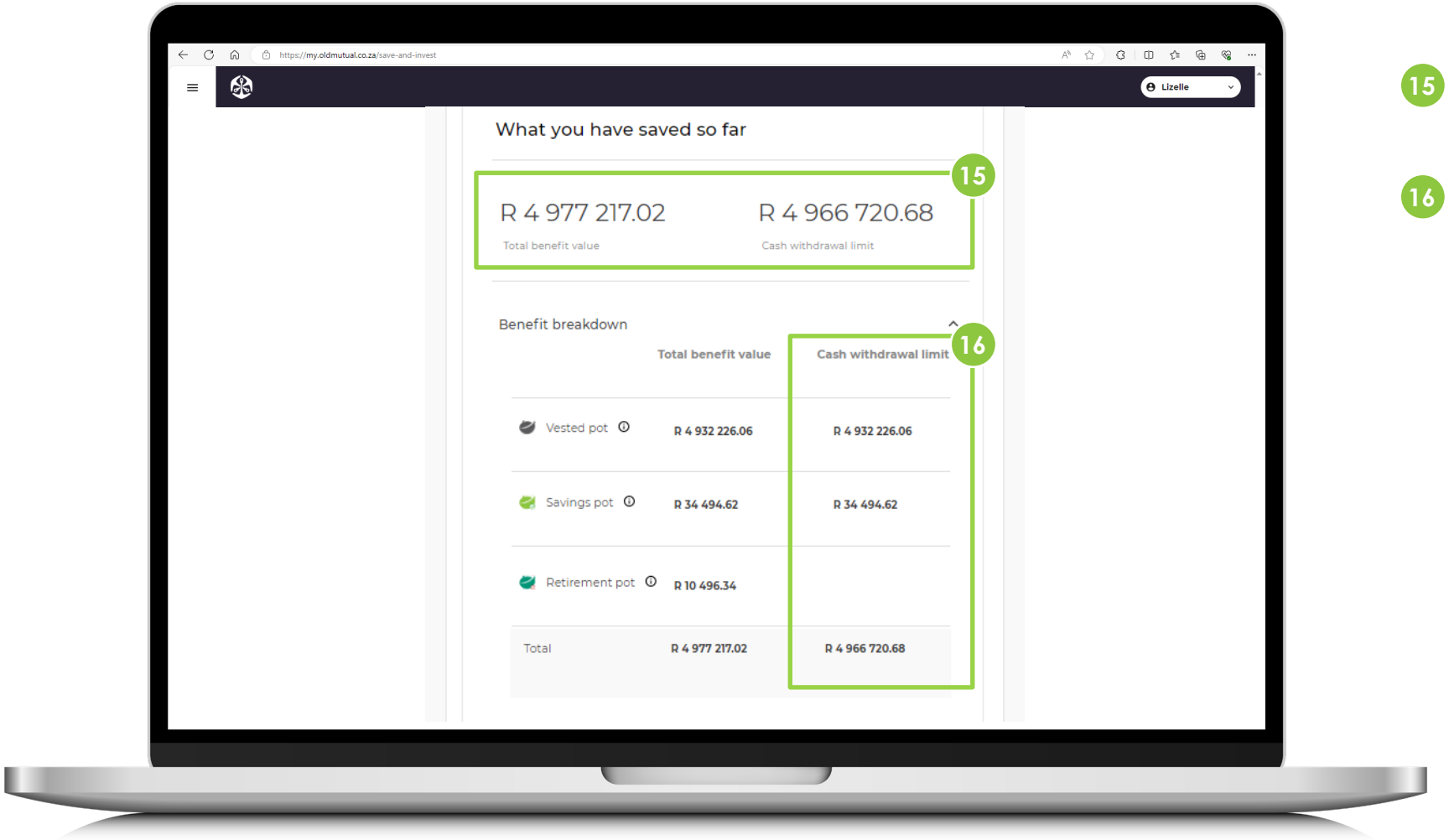
13 **HELP!** If you get stuck, you can click on **VIEW MYCLAIM HOW-TO-GUIDE**, which will take you to a portal with all the learning material.

QUICK REFERENCE GUIDE



14 Complete the **Exit date** and **Exit reason**.

QUICK REFERENCE GUIDE

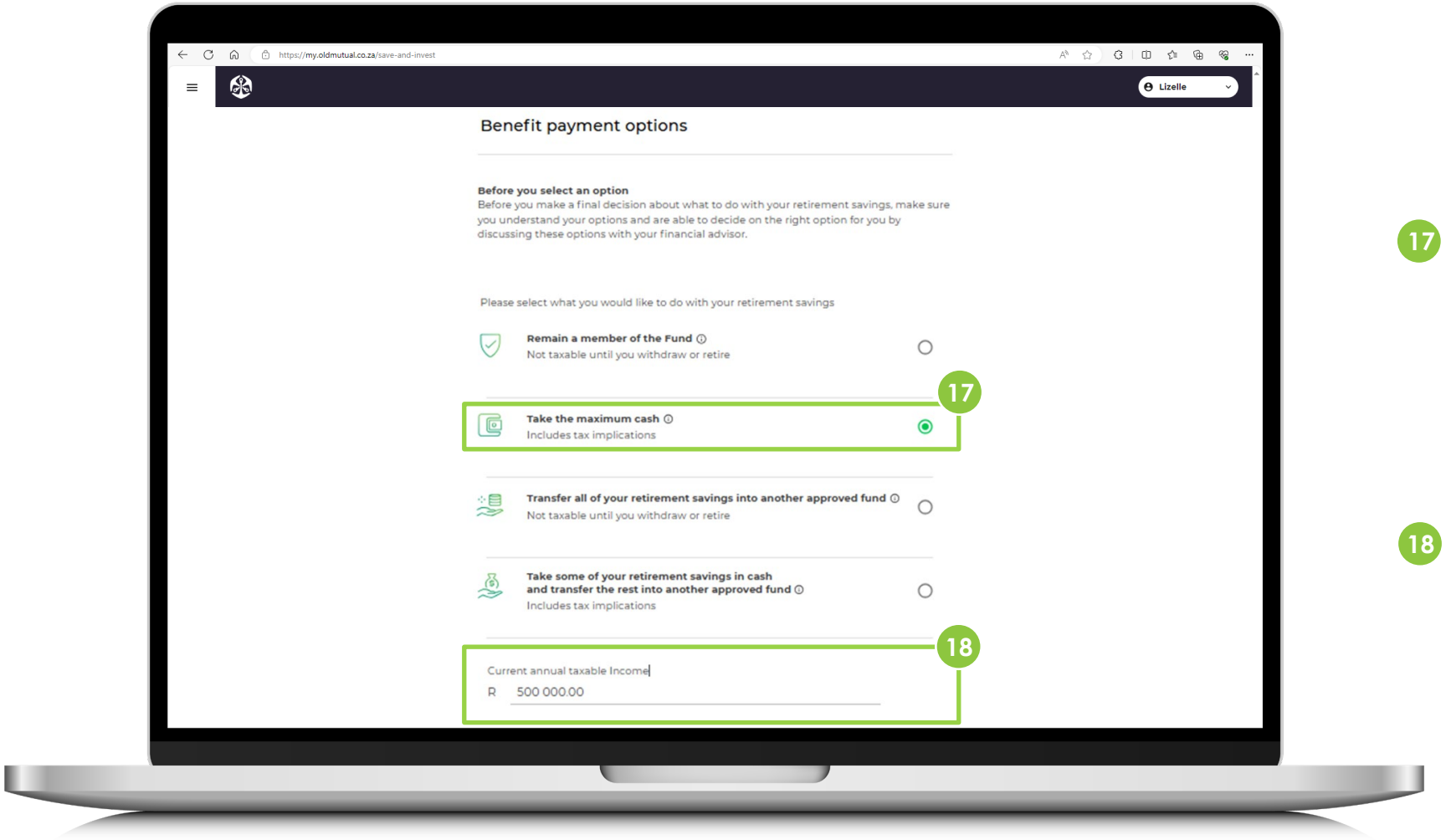


15 This is the total benefit the member has saved to date.

16 View the values in each of your pots to see the maximum cash you can withdraw.

NB: You will only be able to access your retirement pot at retirement.

QUICK REFERENCE GUIDE



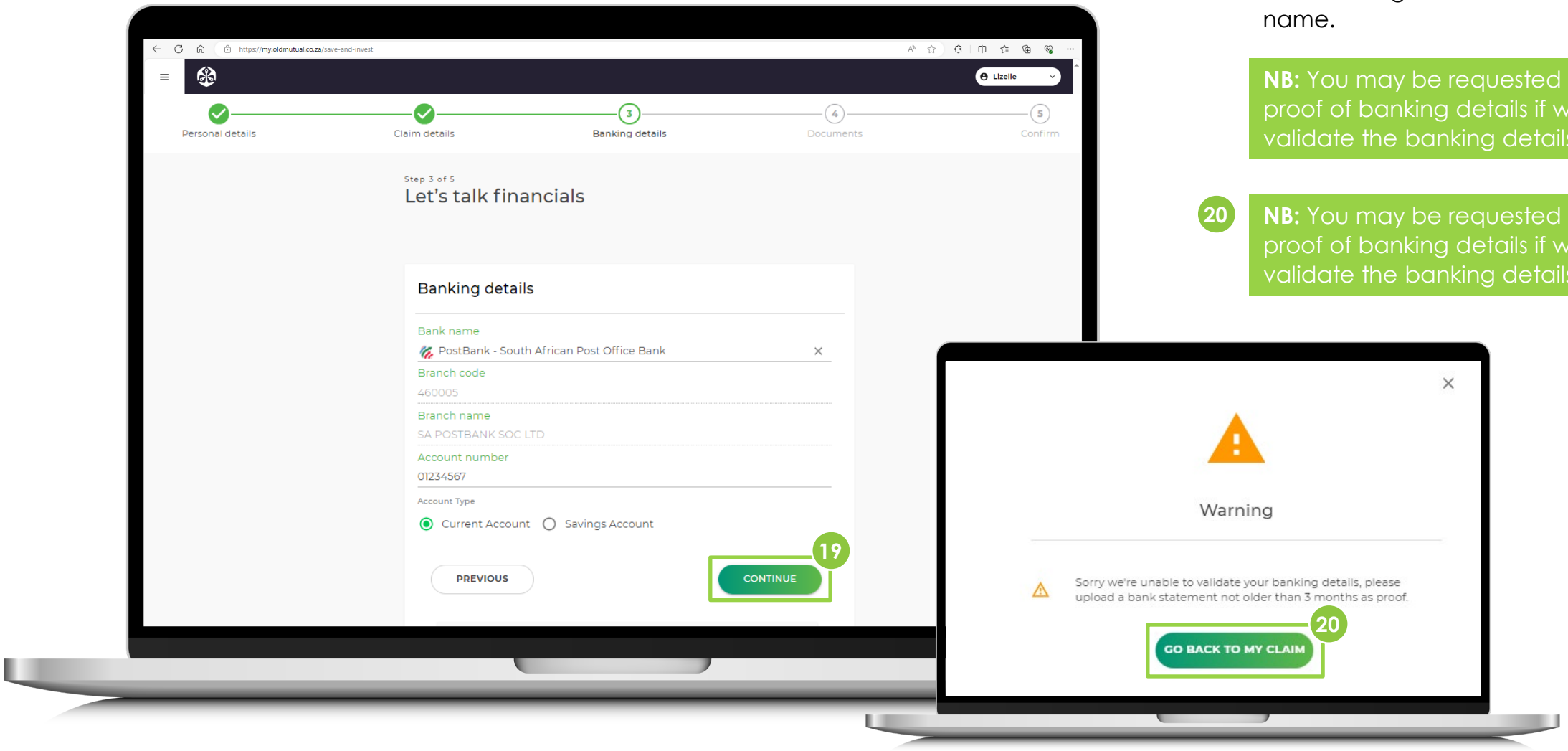
Click on the ⓘ information icons to read more information about each of the options.

17 Select one of the options, by clicking on the circle.

For example, this member elected to **Take the maximum amount in cash and preserve the rest** under the Benefit payment options.

18
- Input your **current annual taxable income.**
- Click on **CONTINUE** to proceed to the next screen.

QUICK REFERENCE GUIDE



19 Complete the **"banking details"** section, with banking details that are in your name.

NB: You may be requested to provide proof of banking details if we cannot validate the banking details provided.

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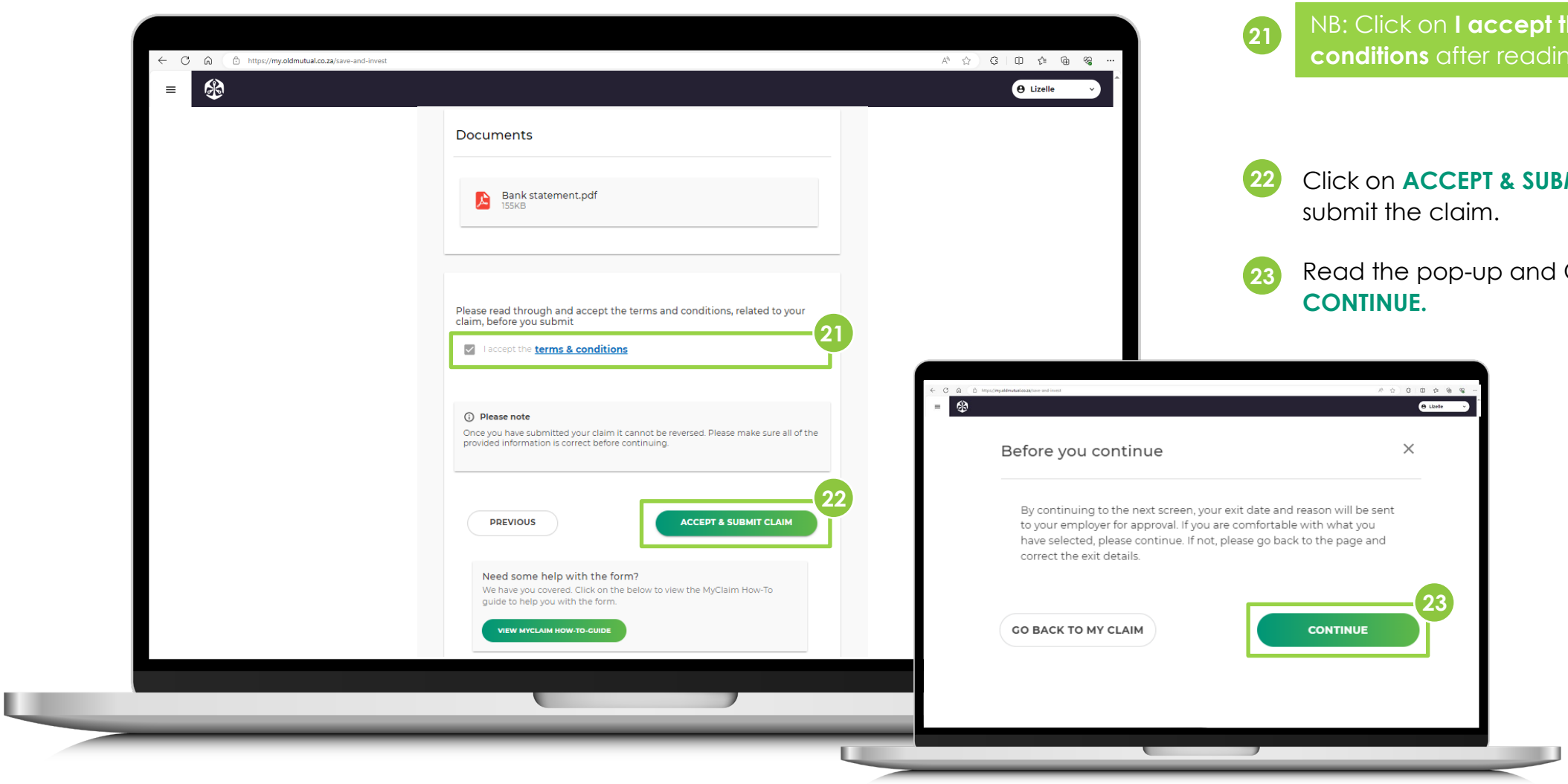
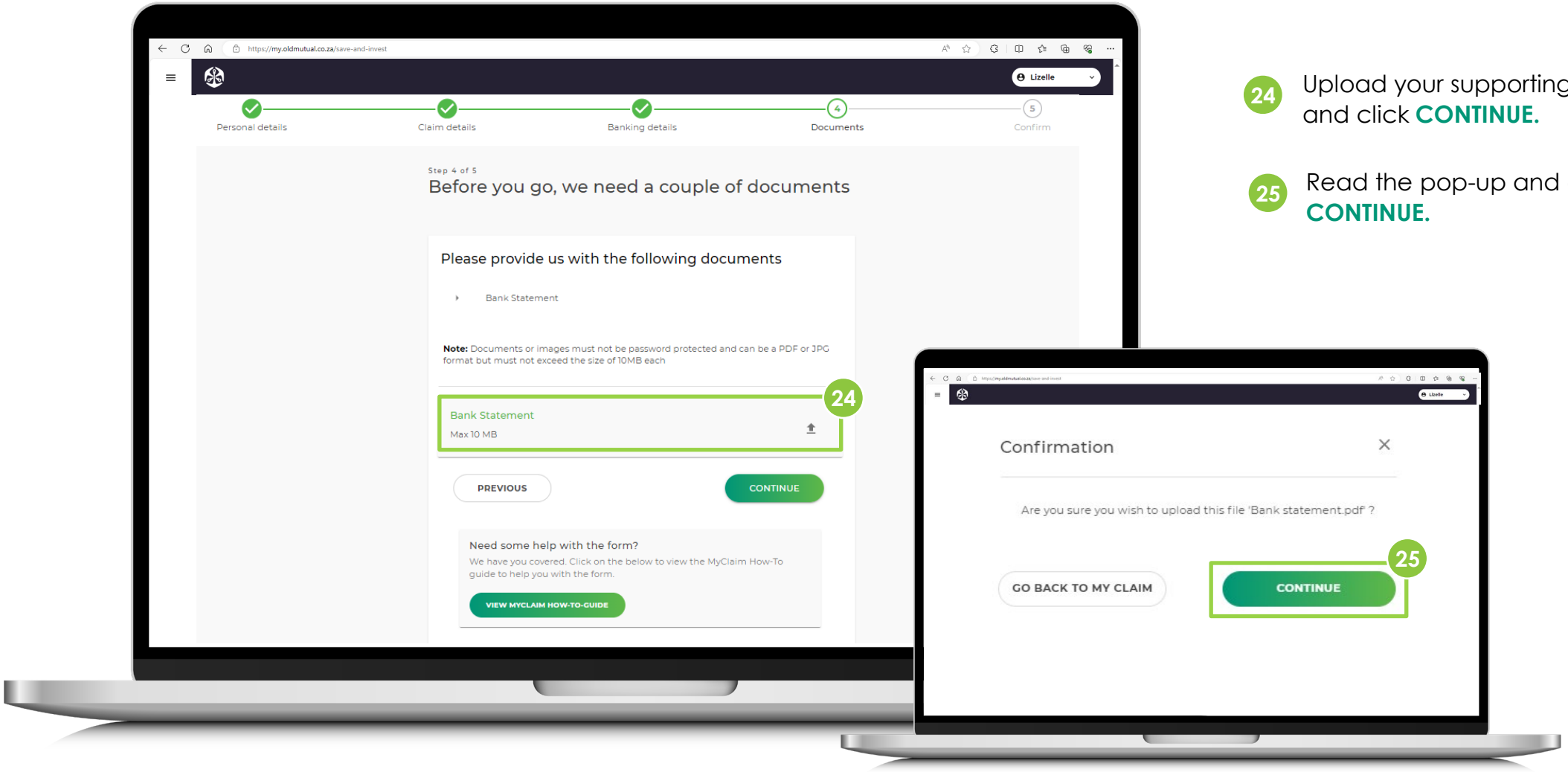


21 NB: Click on **I accept the terms and conditions** after reading them.

22 Click on **ACCEPT & SUBMIT CLAIM** to submit the claim.

23 Read the pop-up and Click on **CONTINUE.**

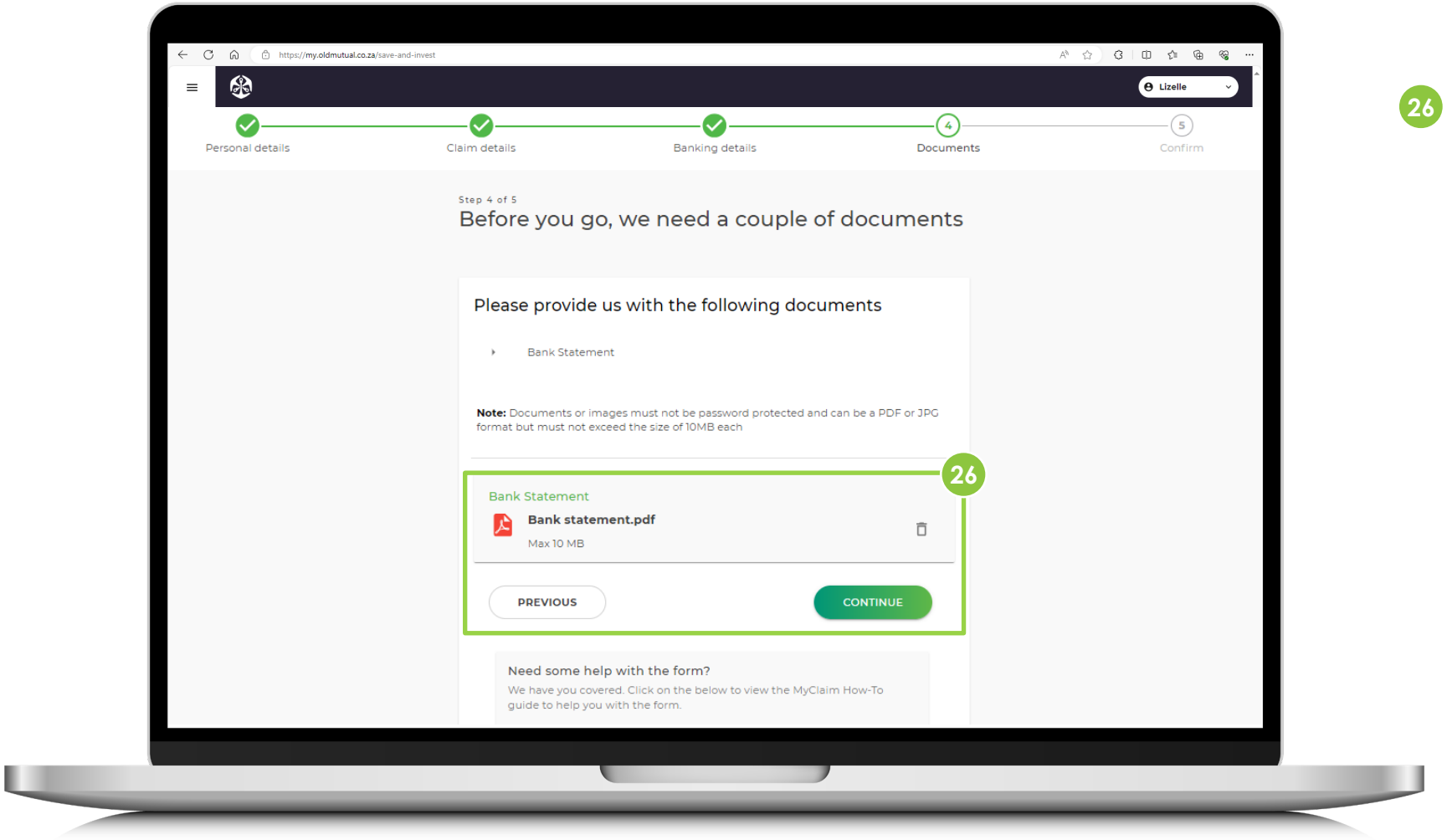
QUICK REFERENCE GUIDE



24 Upload your supporting documents and click **CONTINUE.**

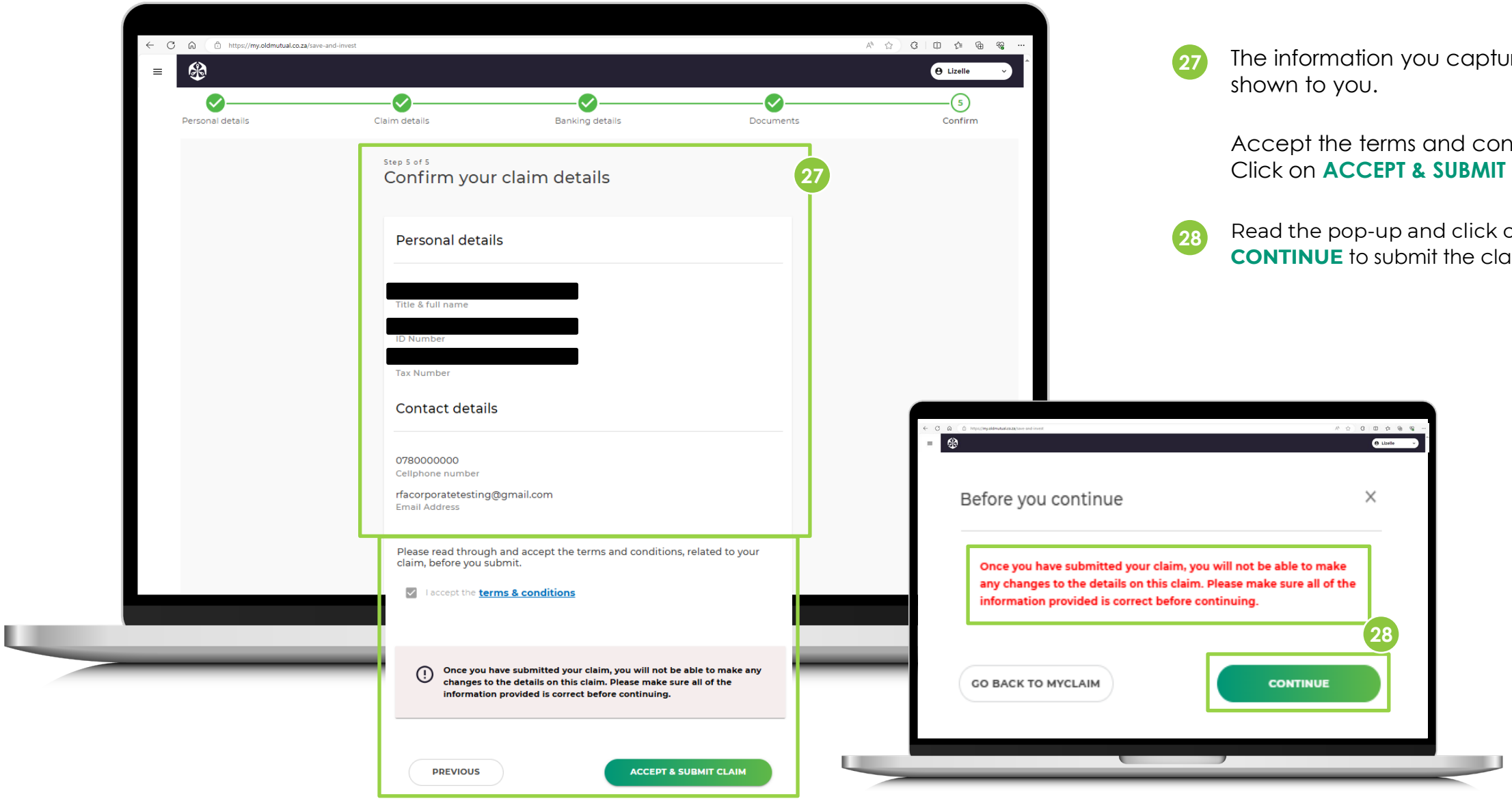
25 Read the pop-up and click on **CONTINUE.**

QUICK REFERENCE GUIDE



26 Read the pop-up and click on **CONTINUE** to submit the claim.

QUICK REFERENCE GUIDE

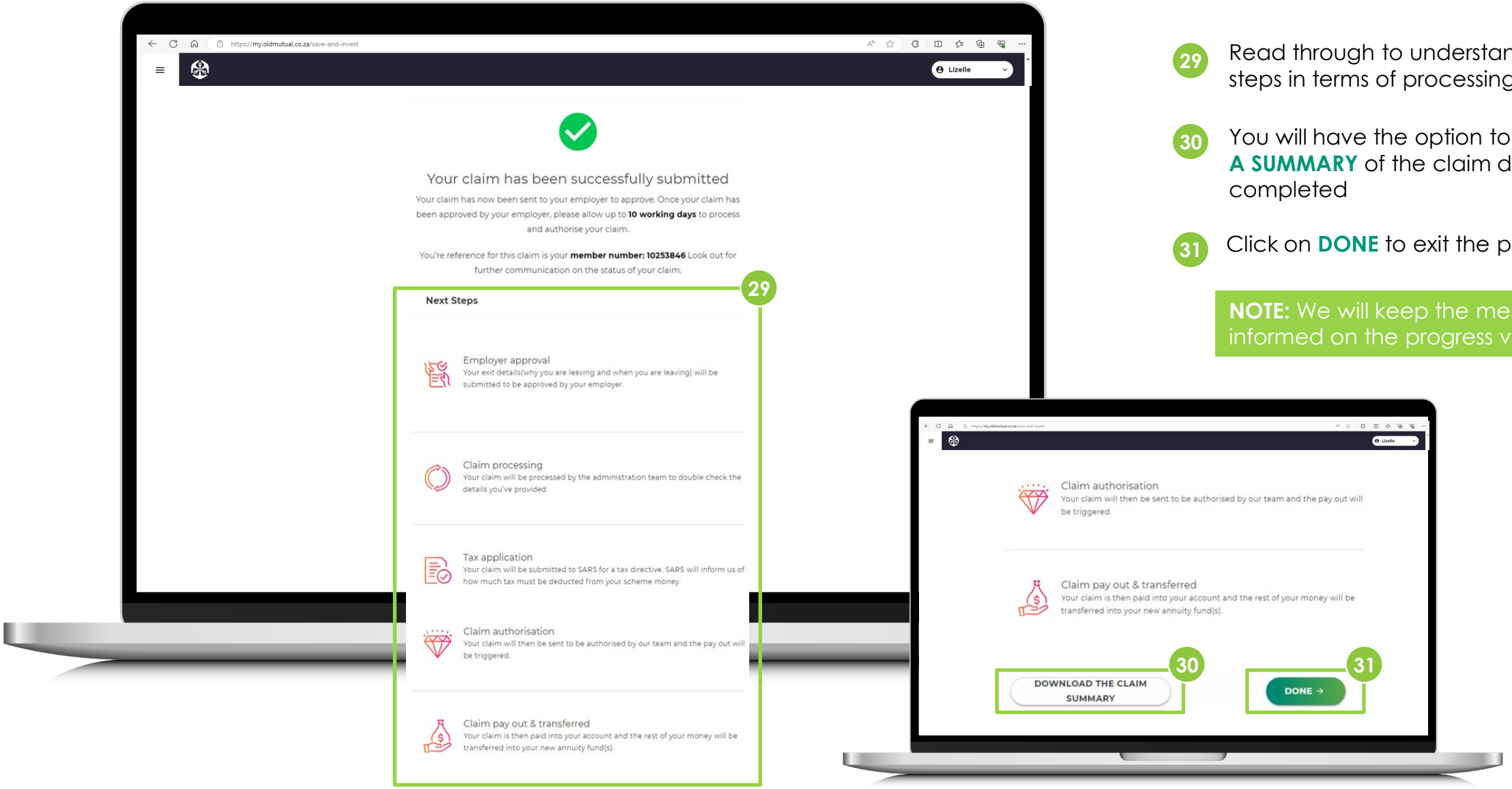


27 The information you captured will be shown to you.

Accept the terms and conditions and Click on **ACCEPT & SUBMIT CLAIM.**

28 Read the pop-up and click on **CONTINUE** to submit the claim

QUICK REFERENCE GUIDE



29 Read through to understand the next steps in terms of processing your claim.

30 You will have the option to **DOWNLOAD A SUMMARY** of the claim details you completed

31 Click on **DONE** to exit the portal.

NOTE: We will keep the member informed on the progress via SMS.

THANK YOU!

Please reach out to the Call Centre should you need assistance: **0860 20 30 40**

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