TRAVEL PORTAL



QUICK REFERENCE GUIDE – FRONTLINER ACCESS





Getting to know Travel Portal

Using Travel Portal for the first time

Issuing an Official Confirmation of Coverage (OCC)

Retrieving an OCC

Cancelling an OCC

Important Reminders

Contact Details





Getting to know the Travel Portal



What is the Travel Portal?

The Travel Portal will allow you to issue Travelsafe Policies (Official Confirmation of Coverage) online. Convenient and user-friendly, Travel Portal is an internet-based system that will improve the way you do business.





I want to use Travel Portal. What do I need to do?

Accomplish an Enrollment Form.



Blue Cross Center, 8000 Makati Avenue, 1200 Makati City, Metro Manila, Philippines Tel. No.: +63 2 899-8001 Fax No.: +63 2 899-5389 Email: travel_sales@bluecross.com.ph

TRAVEL PORTAL ENROLLMENT FORM



A. GENERAL INFORMATION:

Name:	
Address:	
Contact Person:	Contact Number:
HBS Code: (Blue Cross Issued)	Nature of Business:

B. AUTHORIZED AGENTS:

	Last Name:	Middle Name:	
REPRESENTATIVE 1	First Name:	E-mail:	
(Access Level 1)	HBS FL Code: (Blue Cross Issued)	Contact No.:	
	User Name: (Blue Cross Issued)	Cellphone No.:	·
	Last Name:	Middle Name:	
REPRESENTATIVE 2	First Name:	E-mail:	
(Access Level 2)	HBS FL Code: (Blue Cross Issued)	Contact No.:	
	User Name: (Blue Cross Issued)	Cellphone No.:	
	Last Name:	Middle Name:	





Using Travel Portal for the first time



How do I begin using Travel Portal?

When using Travel Portal for the first time, you must first enter the username and default password issued to you.

PACIFIC CROSS PHILIPPINES TRAVEL PORTAL	•
Login Information Username Password Forgot Password Log In	<u>On</u>]
Travel Portal - Quick Reference Guide	



How do I change my password?

Enter your current password, followed by a new password of your preference, then type your new password again to confirm. To finalize, click *Change Password*.

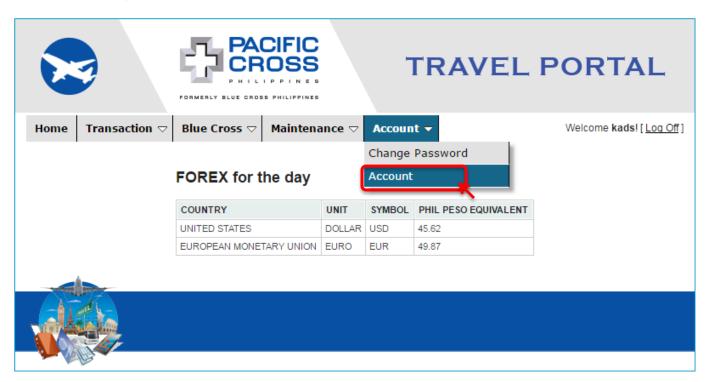
	PACIFIC CROSS		٦	ΓRAVEL	PORTAL
Home Transaction ▽	Blue Cross	nce ▽	Accoun	it ▼	Welcome kads! [Log Off]
			Change Password		
	FOREX for the day		Account		
	COUNTRY	UNIT	SYMBOL	PHIL PESO EQUIVALENT	
	UNITED STATES	DOLLAR	USD	45.62	
	EUROPEAN MONETARY UNION	EURO	EUR	49.87	

—Change Password—	
Current password	
New password	
Confirm new password	
	Change Password



How do I set-up my Account?

It is important that you provide the required security information and a valid email address. You will need these in case you forget your password.





What do I do in case I forget my new password?

In case you forget your password, click *Forgot Password* on the Travel Portal Home Page.

I	ogin Information
Username	
Password	
	Forgot Password Log In



You will then be prompted to provide your username and to answer a security question. Once you've provided the correct answer, click **Send me new password**. Your new password will be sent to the e-mail address you provided in your Account information.

-Forgot Pa	ssword
Username	
	Next

Forgot Password				
Username	BCuser			
Security question	What is your last name?			
Security answer				
	Send me new password			

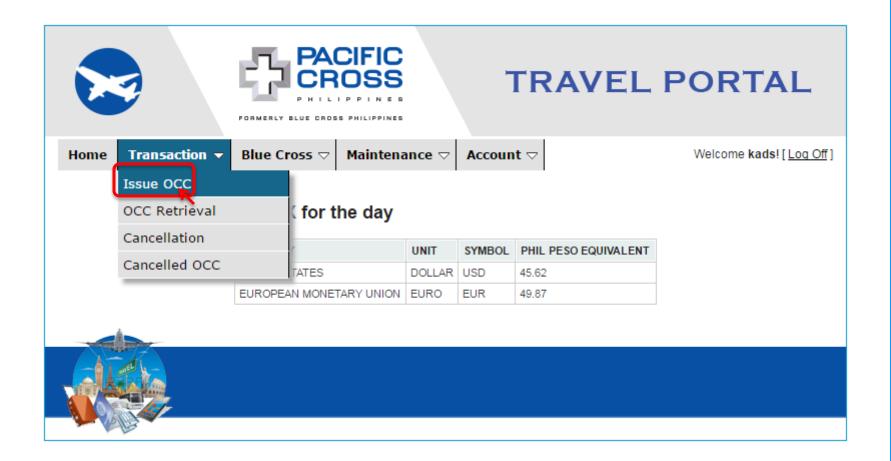




Issuing a Pacific Cross Travelsafe Official Confirmation of Coverage (OCC)

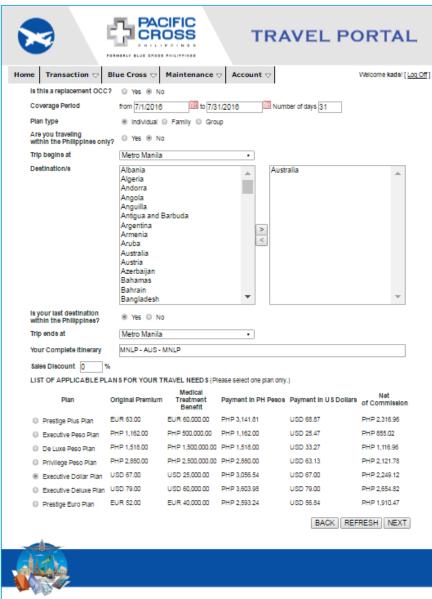


STEP 1: Click *Issue OCC*.





STEP 2: Provide the client's travel information by clicking the appropriate tick boxes.





STEP 3: Fill out the online application form by typing in the required information, or clicking the appropriate tick boxes. Once completed, click *Next*.

	PACIFIC CROSS	TRAVEL F	PORTAL
Home Transaction ▽ B	lue Cross ▽ Maintenance ▽	Account ♥	Welcome kads! [Log Off]
Is the applicant same as the principal insured?	® Yes ○ No		
Name of Principal Insured			
Mr. ▼ Juan	R	Dela Cruz	•
Title First r			Suffix
Birthdate	05/10/1979 Age	37	
Gender	Male ▼		
Mailing Address	123 ABC ST MAKATI CITY		
		1200	
	Philippines	▼ ZipCode	
	Country		
Primary Contact Number	63 913 4567 Country code Area code Contact	number	
Email address	ABC@YAHOO.COM		
I.D. Type	Passport Number ▼		
I.D. Number	CC2946204		
Name of Beneficiary		ment of Claims" provision will prevai	D.
Ms. • Anna	Sison	Dela Cruz	•
Title First N			Suffix
Relationship to Insured Spous	se •		
		REFR	ESH BACK NEXT
		KEFK	DAOK NEXT
-4-			





TRAVEL PORTAL

Welcome kadal | Log Off |

Maximum period of insurance for Travelsafe Tripguard is 180 days.

Purpose of travel must be business, shortterm study, leisure or to visit relatives.

Please contact your Business Development Specialist for the following cases:

- (1) Your client is requesting for Extension of coverage
- (2) Your client's trip had begun prior to the request to purchase a travel insurance

CANCELLATION REMINDERS

Account ∇

Please double check the summary below to ensure that all details are correct, if there are errors, we suggest that you cancel this OCC and begin your transaction again.

If this transaction is to replace a previously issued OCC, cancel the previous OCC prior to its departure to avoid being billed more than

Cancelled transaction can no longer be recovered. Make sure transaction is for cancellation before clicking cancel.

YOUR TRAVEL SAFE IN SURANCE COVERAGE SUMMARY

Travel Agency: BC test Travel Agency

Insured Person's Name

Birthdate

Current Age

Itinerary

Coverage Area

Schengen Coverage

Coverage Period

Product Type

Type of Plan Plan

Medical Treatment Limit

Original Premium

Premium in Peso Premium in Dollar Mr. Juan R Data Cruz

May 10, 1979

MINLP - AUS - MINLP

Travel Excluding USA / Canada / HKG

July 01, 2016 - July 31, 2016

Tripquend

Individual

Executive Dolor Plan USD 25,000.00

USD 67.00

PHP 3,058,54

USD 67.00

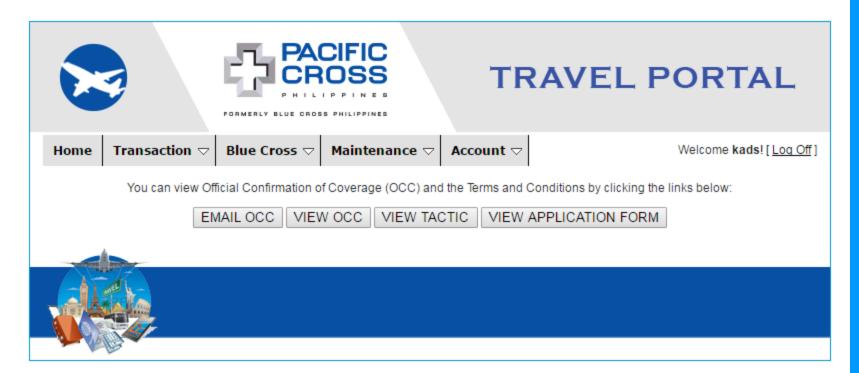
BACK | CONFIRM



STEP 4: Review the Travelsafe Insurance Coverage Summary. If everything is in order, click Confirm. If there are errors, click **Back** and edit details as needed. To be safe, you may opt to just cancel and close the summary window, and begin your transaction again.

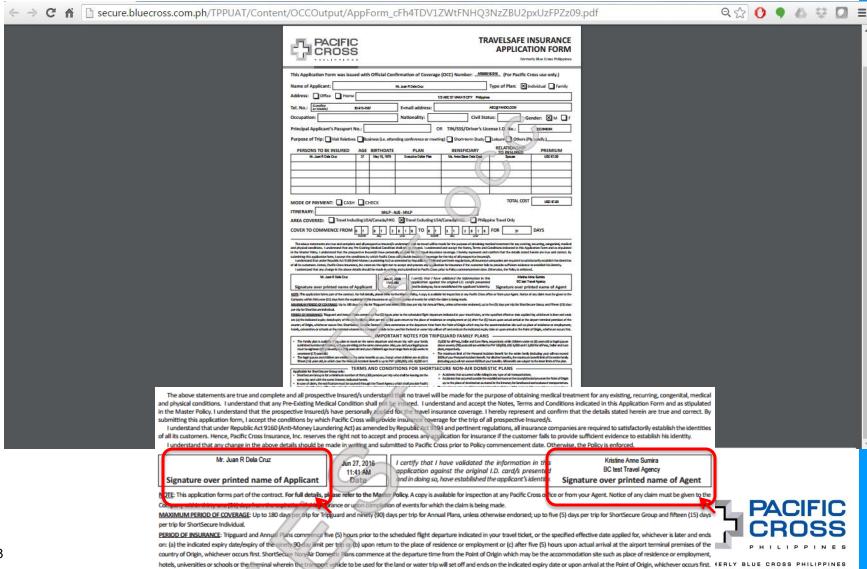


STEP 5: Email OCC, View the OCC, TACTIC and Application Form by clicking the appropriate links.

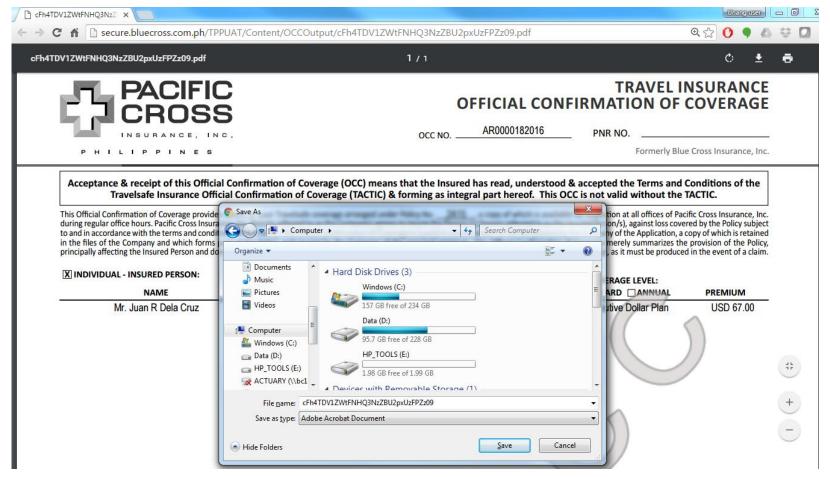




STEP 6: Print the Application Form and have the applicant sign on the appropriate space. The Travel Agent who issued the OCC should also sign.



STEP 7: Print the OCC and give the client a copy. You may also save it in your computer, then send it as an attachment via e-mail.



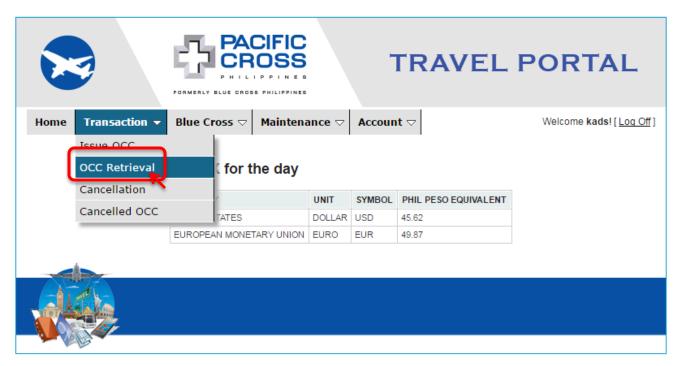




Retrieving an OCC



Click OCC Retrieval.



The OCC Retrieval module will allow you to search for an OCC in several ways. You may select one category, or a combination of categories to help you look for an OCC. Once you select your categories and provide the corresponding information, click **Search**. To start a new search, click **Refresh**.

You may also view OCCs you have issued by clicking *Download*. A ".csv" file (which you can open in Excel) will then be made available. If you leave all the search fields blank, clicking *Download* will show you all the OCCs you have issued so far. You may narrow down the scope and output of your Download file by selecting a category and plugging in the required information.

PACICAL P. HILLIP	TRAVE	EL PORTAL
Home Transaction Blue Cross M	aintenance ▽ Account ▽	Welcome kads! [Log Off]
Find OCC & Ap	p Form	
	OCC number First Name Middle Name La	st Name
<u>View OCC</u> <u>View App Form</u>		la Cruz
	Page 1 of 1 << < Prev Next > >>	
Find by OCC no:		
Find by first name:		<u> </u>
Find by middle name:		<u> </u>
Find by last name:		Ī
Find by issue date from	: to	
Find by frontliner code:		7
Find by frontliner name	:	
Find by travel agency o	ode:	7
Find by travel agency n	ame:	
	Refrest Download Search	





Cancelling an OCC

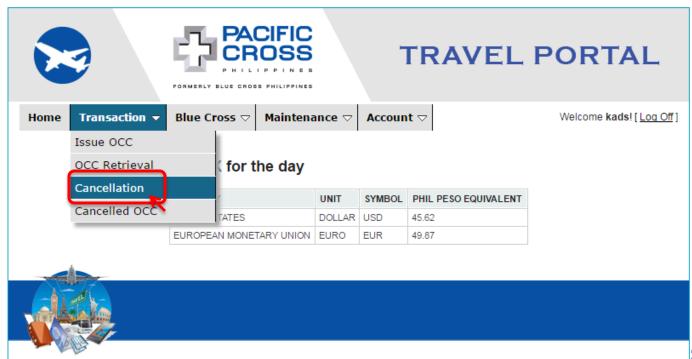


FORMERLY BLUE CROSS PHILIPPINES

OCC Cancellation can be done through the following options:

OPTION 1: Click Cancellation button under Transaction tab

<u>NOTE:</u> When going through this cancellation process, please make sure that you have already created the replacement OCC, before proceeding to the Cancellation Screen. The OCC number of the replacement OCC ("OCC Replacement") is a required field in the Cancellation Screen. Without it, you will not be able to complete the cancellation process.



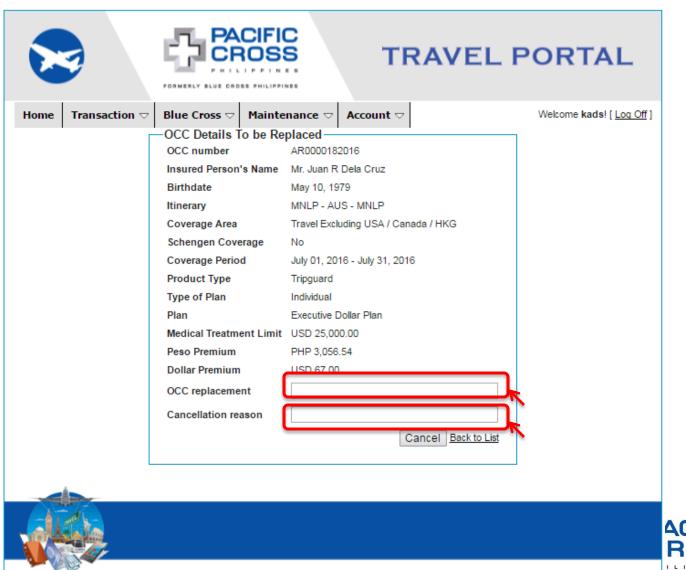
Search for the OCC you wish to cancel. Once found, click *Cancel*.

	ACIFIC CROSS PHILIPPINES	TR	AVEI	L PORTAL
Home Transaction Blue Cross		Account ▽		Welcome kads! [Log Off]
Cance	llation			
9	OCC number First Nam	me Middle Name	Last Name	
Cancel	AR 0000182016 Juan	R	Dela Cruz	
	Page 1 of 1 << <	Prev Next > >>		
Find by O	CC no: AR00001	82016		
Find by fir	rst name:			
Find by m	niddle name:			
Find by la	ist name:			
Find by is	sue date from:	to		
		Refres	h Search	



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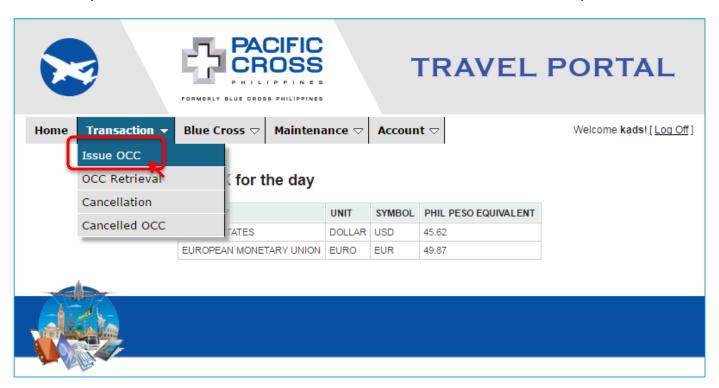
After you click *Cancel*, a Cancellation Screen will be shown. Provide the OCC number of the Replacement OCC and the reason for cancellation (e.g. change in coverage period).



OCC Cancellation can be done through the following options:

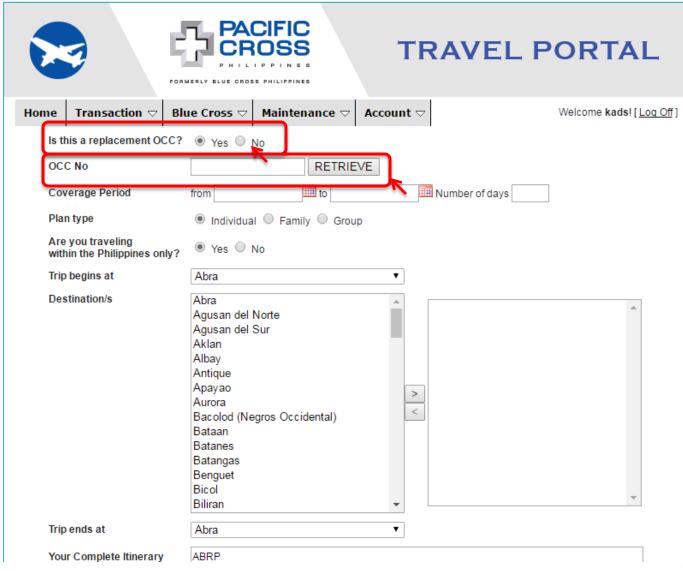
OPTION 2: Click Issue OCC button under Transaction tab

<u>NOTE:</u> When going through this cancellation process, **please make sure that you have the OCC number for retrieval.** Once new OCC is issued, the previous OCC will be automatically cancelled and no need to do OPTION 1 cancellation process.





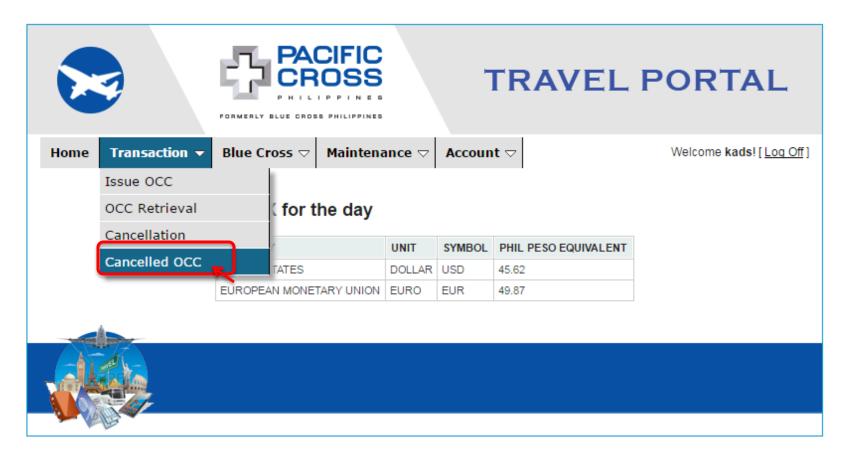
In the question "Is this a replacement OCC?" select "Yes" then input OCC number and click RETRIEVE button.





Cancelled OCC

Please note that the *Cancellation* link allows you to cancel an active OCC. On the other hand, the *Cancelled OCC* link allows you to view and search for details of OCCs that are already cancelled.







Important Reminders



- 1. For cancellation on the 4th day onwards from date of OCC issuance (the date of issuance is counted as day 1): The Travel Agent must cancel the OCC in Travel Portal.
- 2. Cancellation <u>on</u> the departure date is **not** allowed.
- 3. Cancellation <u>after</u> the departure date is **not** allowed.
- 4. For Family Plans: Please note that if an Insured Person is below 6 years old, you will not see a corresponding PA Beneficiary Field for said Insured Person until further notice.





Contact Details



For cancellation approval, questions and other concerns regarding Travel Portal, please get in touch with your Pacific Cross Business Development Specialist. You may reach them through the following:

Telephone Numbers:

(632) 899-8001 local 5003 (Mondays to Fridays, 8:30 a.m. to 5:30 p.m.)

E-mail address: bctap@pacificcross.com.ph





THANK YOU!

