






Welcome to The Heron Partnership's "Superannuation Outsourcing Service" – otherwise known as SOS.

This HELP GUIDE is a quick way to assist you in familiarising yourself with using the SOS system. Please read it prior to using the website for the first time. We suggest that after you have read this you go to the TENDERS tag and visit the DATAROOM. In the Data Room you will find the Superannuation Procurement Proposal (SPP) for the tender. Printing a hard copy of that document will also assist you in working your way through what is required for a particular tender and where to obtain or submit details required for the tender.

Through this SOS system, you will be using the following features:




 Tenders	Used for all tender specific information including <ul style="list-style-type: none">a list of new and "in progress" tenders you are involved in,the Data Room where client information is made available,client specific tender questions, andlodgement of tender responses.
 Product Info	A wide range of generic product information regarding your product and grouped as <ul style="list-style-type: none">Member Experience,Employer Experience,Investment Arrangements, andPersonality.
 Reports	You are responsible for keeping this data current and have been given editing rights. Access a range of reports on your performance in tenders. Heron's Eye participants (those using our unique service for assessing outsourcing solutions) are able to access additional reports made available to you here. These include the gap analysis report card for your products, the Heron commentary, your scores and relative highest and lowest scores for each area assessed. These reports are also viewed by our clients.
 Change Password	Changes your password for accessing the SOS system. You are able to change your password as frequently as you wish.
 Logoff	Logs you out of SOS and returns you to The Heron Partnership's website.

TENDERS

New Tenders

At the top of the screen is a list of "new tenders" which you have been invited to participate in. Underneath the tender description is a toolbar with the following 3 buttons:

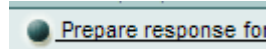
If you wish to participate, you must accept by COB 25/06/2004

 [Dataroom](#)  [Decline](#)  [Accept](#)

Data Room	A document library containing client information related to this tender. You will need to view these documents to understand the client and their requirements for the tender. One of the most important documents in the Data Room is the Superannuation Procurement Proposal (SPP) which we suggest you print out. It contains a full briefing together with a complete checklist of what you must submit for the tender.
Decline	Click this if you do not wish to participate in this tender. The tender will be removed from your "New Tenders" list
Accept	Click this if you wish to participate. The tender is then added to your "In Progress" tender list and will allow you access to the facilities for submitting your tender responses. If you have more than 1 product which has been invited to tender, you will be asked to select which products you will be lodging responses for.

In Progress Tenders

Below the new tender list are the tenders you currently have in progress including a brief overview of the client, and a "prepare response" link for each of your products.



Underneath this is another toolbar which gives you access to the dataroom:



Data Room	A document library containing client information related to this tender.
Submit	Submits the information you have provided for this tender. If you have multiple products, information will be submitted for all products at this time. <i>Note: you may still access the tender and resubmit until the final submission date.</i>

Prepare Response

Clicking on the "prepare response" button will open a "Submission Manager" screen showing a progress summary of your submission. Items highlighted in green mean you have completed this step in the tender response. Items in red are areas which are not yet completed and will show a status description of what is outstanding. Orange items are warnings about a step which is not required to lodge your tender response, but may affect your scoring.

Summary

The following steps must be completed for your tender submission to be accepted:

- 1 Answer all client-specific questions.**
There are no unanswered questions.
- 2 Answer all highlighted questions.**
There are 6 unanswered questions.
- 3 Answer all cost-related questions.**
There are 2 unanswered questions.
- 4 Review your generic product info to ensure that it is complete and accurate.**
There are 50 unanswered questions.
- 5 Attach the required documents**
There are 1 documents which have not been attached.

You cannot submit yet as there are still items outstanding. These are indicated in red above.

SUBMIT

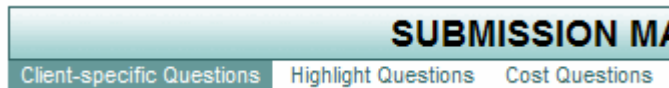
Client-specific Questions	"Client specific" questions are those which have not previously been asked. They are prepared specifically for the particular client. Typically, amongst other things, they will include questions on your pricing and details of the nominated Account Manager for the client.
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Highlighted Questions	A "highlighted" question is a question already answered in your product information, but which Heron requires you to answer specifically for the client. Typically this can include questions on AAL's or the number of education sessions you will include for this client. As these questions are already held in our data base, your new response for the client will override the generic response we hold (just for this client's tender). We then rate you on that response for the client.
Cost-related Questions	These questions are focussed on the costs you are proposing for this tender.
Generic Product Info	If you would like to "override" any information recorded about your product with a client specific response, you may click the "Override Product Info" in the toolbar and navigate to the information you want to change. Your change will then be approved and scored by Heron. You may also check a box on your response to indicate that you would like this change to update your generic product information also.
Required Documents	A number of additional documents may be required to lodge your tender. These documents will often include an Executive Summary of the service you are proposing, and insurance details.

Once you have completed all the steps and there are no red highlights, the "Submit" button will be activated and you can submit your response.

Below the summary is a list of items which have not been completed for your tender response. You may click on each item to provide the required information, or print out this page for your reference while preparing your tender response.

Additionally, at the top of the screen is a toolbar allowing you to view each of the areas in more detail. This would most commonly be used to review information already provided.



Once your tender submission has been completed, you must go back to the "Tenders" screen and click the "Submit" button for the relevant tender.

PRODUCT INFO

Select Key Criteria

The Product Info refers to the generic data we hold on your product. This option will allow you to view your responses and edit them if required.

To find the relevant area you will need to be familiar with how we store the data. We hold 4 **Areas of Importance** which are the high level headings. These are:

- Member Experience,
- Employer Experience,
- Investment Arrangements, and
- Personality.

Under each of these broad headings we have a more detailed list of question headings. We refer to these as the Key Criteria. To view/update your information you will need to first click on an "Area of Importance" on the left and this will bring up a list of "Key Criteria" on the right. Select the appropriate key criteria and click the "Next" button.



Area of importance	Key criteria
--- SELECT ONE ---	--- SELECT ONE ---
Investment Arrangements	Client Relationship Model
Member Services	Employer Communication
Employer Services	Employer Reports
Personality	Employer Website
	Payroll Support
	Policy Committee

If you have multiple products, you will be prompted to select which product to view/update information about.

Responses

On this screen, you will see a list of all questions under the key criteria, with your current responses.

To change your response for any question, click the "Response" label for that question.

?	Ability to badge Newsletters and additional costs
?	Response: Yes


This will open a new window where you can update your response and provide any additional comments. If you want to change the key criteria you are looking at, click the "Change Key Criteria" link at the top of the page.

RESPONSES
Change Key Criteria

REPORTS

Provides a list of tenders for which scoring has been completed, allowing you to access reports on your performance in the tender against other participants.


If you are a participant in The Heron's Eye, the additional reports are made available to you below. To run a report, simply click on the report title. Providers who are not participants in The Heron's Eye will not have access to run these reports.

 Gap Analysis Report Card
For a single product, shows the score for each key criteria compared against the maximum, minimum and average scores. Also shows Heron's comments for the product for each key criteria.



CHANGE PASSWORD

We recommend you change your password regularly to reduce the risk of unauthorised access to your account and data. To change your password, click on the "Change Password" button, enter your new password twice and click the "Save" button.

 Change Your Password	
New password:	<input type="password"/>
Confirm password:	<input type="password"/>

LOGOFF

When you have finished using SOS, we recommend you click the logoff button to ensure that your session is closed properly. This prevents someone else using your computer from logging back in without supplying a username and password. For your security, you will automatically be logged off if you do not click on any links for 8 hours.

