

Adviser Access – Self-service Requests

To help make it easier to do business with us, this how-to- guide will support you to update member details, submit enquiries, and request quotes for excess or policy changes through the nib Adviser Portal.

What you can do in Adviser Access V2

- Request policy changes for on-sale, eligible Ultimate Health, Ultimate Health Max and Easy Health policies (change excess and change options) and view an estimated premium before submitting.
- Update contact details (phone and address). These updates are processed automatically once saved.
- Request updates to personal details (name, gender assigned at birth, date of birth, smoking status). These requests are reviewed and processed manually due to potential premium impact.
- Submit a general request/enquiry when your request is not covered by one of the above specific change flows.

The screenshot shows the nib Adviser One portal interface. At the top, there is a navigation bar with the nib logo, a 'Switch to v1' link, and a user profile icon labeled 'Adviser One'. Below the navigation bar, there are two tabs: 'Members & Prospects' and 'Insights & Analytics', and a green 'New Application' button.

The main content area features a large 'Welcome Adviser One!' heading. Below this is a message box with a gift icon: 'Thanks for trialing our updated Adviser Portal experience for Health policies! Check back for more features soon.'

There are two main sections:

- In progress applications:** A table with columns for Name, Date, Stage, and Actions. It lists 10 applications in progress, each with a 'View' link and a refresh icon.
- Recent members:** A table with columns for Name, Date of birth, and Actions. It lists 10 recent members, each with a 'View' link and a refresh icon.

Both tables include pagination controls at the bottom, showing 'Page 1 of 5' and 'Go to page: 1' with a 'Show 10' dropdown menu.

At the bottom of the page, there is a dark green footer containing the copyright notice: 'Copyright © 2026 nib nz limited, 48 Shortland St, Auckland. All rights reserved.' and links for 'Terms & conditions' and 'Privacy policy'.

Before you start

- Have the member’s details ready so you can select the correct member record.
- Only submit requests where you have authority to act on the member/policy owner’s behalf and informed consent to make changes and submit requests. You will be asked to confirm your authority and informed consent before you can submit changes.

Find and open a member record

1. [Log in to Adviser Access V2.](#) If you have trouble logging in please email our adviser help team at advisersupport@nib.co.nz. On the dashboard, locate the member under “Recent members” or by searching for their policy number on the Manage Members page.
2. Select “View” to open the member record.

The screenshot shows the Nib Adviser One dashboard. At the top, there is a navigation bar with the Nib logo, a 'Switch to v1' button, and a user profile for 'Adviser One'. Below the navigation bar, there are tabs for 'Members & Prospects' and 'Insights & Analytics', and a green 'New Application' button. The main content area features a 'Welcome Adviser One!' message and a notification about the updated Adviser Portal experience. Two tables are displayed: 'In progress applications' and 'Recent members'. The 'Recent members' table has a 'View' link for the first member, which is circled in red.

Name	Date	Stage	Actions
checkpre checkpre	6/15/2026	Assessment	...
s sd	6/10/2026	Cover	...
s sd	6/9/2026	Underwriting	...
s sd	6/9/2026	Underwriting	...
ll	6/9/2026	Underwriting	...
first person	6/8/2026	Underwriting	...
Hope Kihn	6/3/2026	Cover	...
Alisa Donnelly	6/3/2026	Underwriting	...
test test	6/2/2026	Cover	...
test last	5/28/2026	Underwriting	...

Name	Date of birth	Actions
Christiana O'co...	2/1/1994	View
Testab Testing	2/9/1995	View
Marcelo Stolten...	2/1/1994	View
Jess Howell	2/1/1994	View
Eliza Bode	2/1/1994	View
Moleswithmelano...	10/1/1990	View
Gal Folks	6/17/1987	View
Owner Folks	3/10/1981	View
Richard Rich	5/1/1997	View
Harrison Styles	11/1/1998	View

Search for a member



Better search coming soon!

We're working hard to bring you the ability to search for policies by name. Check back soon.

Search by policy number

Alverta Mueller #00616369A

Member details

Name Alverta Mueller	Date of birth 01/01/1994	Gender Female	Smoker No
Address 433 W Broadway Street, Auckland, 0622	Preferred Phone 02121212	Preferred Email alverta14@hotmail.com	

Health Policies

Policy number	Plan name	Policy owner	Start date	End date	Status	Action
0060369	Ultimate Health Cover	Yes	22/06/2026	-	Inforce	Request change

Life Policies

Policy number	Plan name	Policy owner	Start date	End date	Status	Action
No life policies available.						

Recent communications

Name	Date	Type	Size	Action
Message Content (0060369)	22/06/2026	My policy	41.81 KB	View
Acceptance Certificate.pdf (00616369)	22/06/2026	My policy	15.47 KB	View

Active claims (Health)

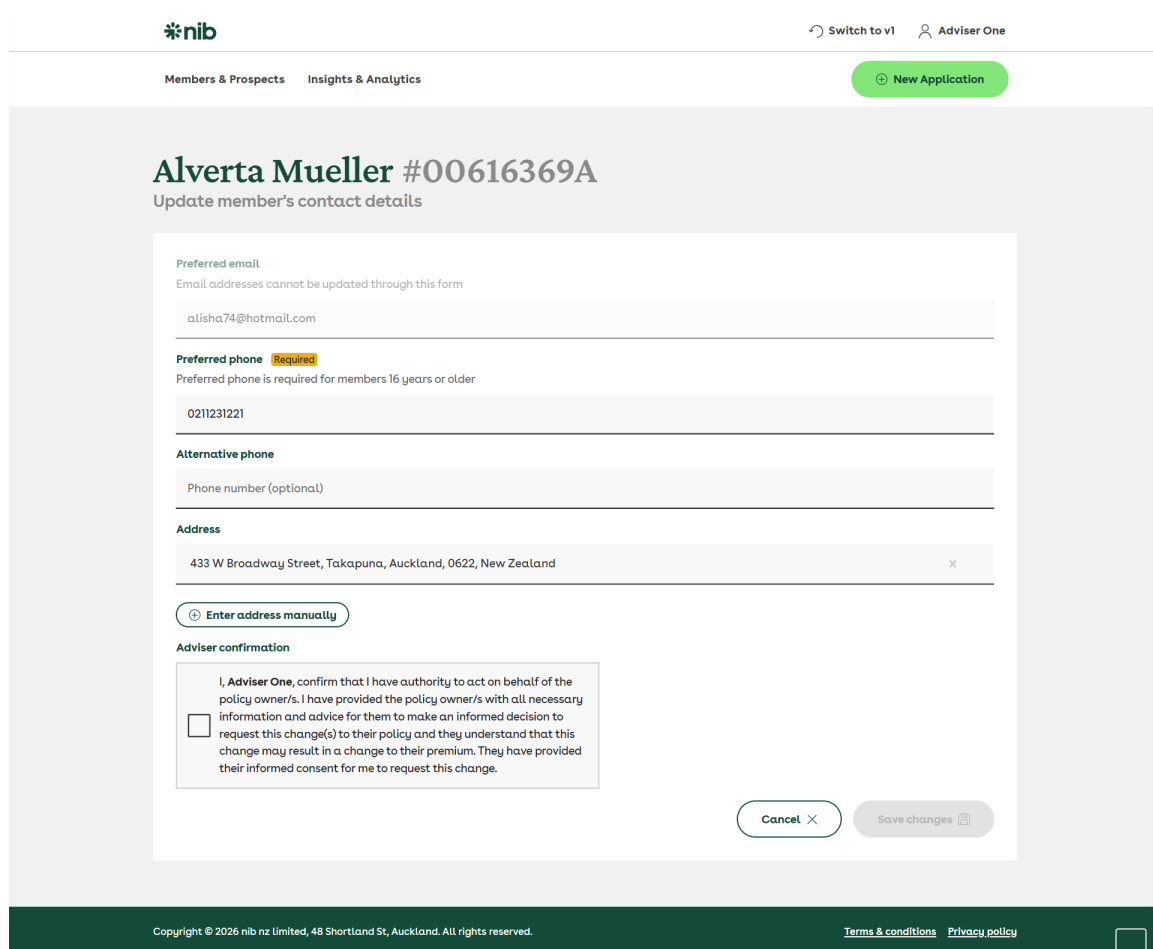
No claim submissions available for member

Active claims (Life and Living)

Update contact details (phone and address)

Use this option to update a member’s phone number(s) or address. These updates are processed automatically once you have saved the change(s). An email will be sent to the member advising them that this change(s) has been made.

1. From the member record, select ‘Update contact details’.
2. Update the relevant fields (preferred phone, alternative phone, and/or address).
3. Ensure you have the authority to act and informed consent from the member to request this change(s) and tick the authority confirmation checkbox (this enables the submit button).
4. Select ‘Save’.
5. Confirm you see the success message (e.g., ‘Contact details updated’).
6. Select “Back to member details” to return to the member record.



The screenshot shows the Nib member portal interface. At the top, there is a navigation bar with the Nib logo, a 'Switch to v1' link, and a user profile for 'Adviser One'. Below the navigation bar, there are tabs for 'Members & Prospects' and 'Insights & Analytics', and a green 'New Application' button. The main content area is titled 'Alverta Mueller #00616369A' with the subtitle 'Update member's contact details'. The form contains several sections: 'Preferred email' (with a note that email addresses cannot be updated through this form and a text input field containing 'alisha74@hotmail.com'), 'Preferred phone' (marked as 'Required' and with a note that it is required for members 16 years or older, with a text input field containing '0211231221'), 'Alternative phone' (with a text input field for an optional phone number), and 'Address' (with a text input field containing '433 W Broadway Street, Takapuna, Auckland, 0622, New Zealand'). Below the address field is a button labeled 'Enter address manually'. The 'Adviser confirmation' section contains a checkbox and a text box with the following text: 'I, Adviser One, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.' At the bottom right of the form are two buttons: 'Cancel' and 'Save changes'.

Alverta Mueller #00616369A

Update member's contact details

Preferred email

Email addresses cannot be updated through this form

alisha74@hotmail.com

Preferred phone Required

Preferred phone is required for members 16 years or older

0211231222



Alternative phone

Phone number (optional)



Address

433 W Broadway Street, Takapuna, Auckland, 0622, New Zealand



[Enter address manually](#)

Adviser confirmation

I, **Adviser One**, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.

Contact details updated



Your changes have been made successfully. It may take a few minutes for the update to appear in the member details.

[Back to member details](#)

Request an update to personal details (name, DOB, gender assigned at birth, smoking status)

Use this option to request changes to personal details. These requests are reviewed and processed manually by the nib team, as the changes may have an impact on premium pricing.

1. From the member record, select 'Update personal details'.
2. Review the onscreen banner indicating the change may affect premium pricing.
3. Update the relevant field(s) (e.g., name details, date of birth, gender assigned at birth, or smoking status).
4. Ensure you have the authority to act and informed consent from the member to request this change(s) and tick the authority confirmation checkbox (this enables the submit button).
5. Select 'Submit request'.
6. Confirm you see the request submitted message.
7. Select 'Back to member details' to return to the member record.


Switch to v1  Adviser One

Members & Prospects Insights & Analytics
New Application

Alverta Mueller #00616369A

Request update to member's personal details

i Changing this information might affect the member's premium amount. We will email you and the member a copy of any changes requested.

First name Required

Middle name

Last name Required

Date of Birth Required

What was the member's gender assigned at birth? Required

Male
 Female

Has the member smoked or vaped any substance in the last 12 months? Required

Yes
 No

Adviser confirmation

I, **Adviser One**, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.

Cancel X
Submit request

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Alverta Mueller #00616369A

Request update to member's personal details

Changing this information might affect the member's premium amount. We will email you and the member a copy of any changes requested.

First name **Required**

Alverta



Middle name

Middle name (optional)



Last name **Required**

Mueller



Date of Birth **Required**

01/01/1994



What was the member's gender assigned at birth? **Required**

Male

Female

Has the member smoked or vaped any substance in the last 12 months? **Required**

Yes

No

Adviser confirmation



I, **Adviser One**, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.



Change to personal details requested for Alverta Mueller

Because these changes might affect the member's policy, we need to review your requested changes. We will notify you and the member if further information is required. You or the member will also be notified once the changes have been processed. If you need to contact us, please reference the policy number.

[Back to member details](#)

Submit a general request/enquiry

Use this option for any requests that are not changing a member's details, excess or policy options. A general request creates a case for nib to action.

1. On the member record, select 'Request change' next to the relevant policy.
2. On the 'Make a request' screen, enter the details of your enquiry or request.
3. Ensure you have the authority to act and informed consent to request change from the member and tick the authority confirmation checkbox (this enables the submit button).
4. Select 'Submit request'.
5. Confirm you see the success message (e.g., 'Case created successfully').

nib Switch to v1 Adviser One

Members & Prospects Insights & Analytics New Application

Make a request

Policy

Policy number 00616369	Billing frequency Monthly	Group Name -	Policy start date 22/06/2026
Renewal date 22/06/2027			

Members

Name Alverta Mueller	Date of birth 01/02/1994	Gender Female	Smoker No
Base plan Ultimate Health Max Base Cover - \$1,000 Excess	Excess \$1,000	Options -	Member start date 22/06/2026

Use this form to enquire or request a change for this policy

Select subject

Enter details of the member's enquiry or the request below

Here is a general enquiry I would like to submit.

Adviser confirmation

I, **Adviser One**, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.

✔ **Policy change request submitted successfully**

We will be in touch if we require more information. If you need to contact us, please reference the policy number.

Back to member details

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Request a change of excess (with estimated premium)

Where supported, you can request an excess change and view an estimated premium before submitting.

1. On the member record, select 'Request change' next to the relevant policy.
2. Select 'Make changes'.
3. Select the new excess amount. The illustration summary updates to show an estimated premium.
4. Ensure you have the authority to act and informed consent from the member to request this change(s) and tick the authority confirmation checkbox to enable 'Submit request'.
5. Select 'Submit request' and confirm you see the success message.

The screenshot shows the 'Make a request' interface in the Nib system. It includes a header with the Nib logo and navigation options like 'Switch to v1' and 'Adviser One'. The main content area is titled 'Make a request' and contains several sections:

- Policy:** A table showing 'Policy number' (0906369), 'Billing frequency' (Monthly), 'Group Name' (—), and 'Policy start date' (22/06/2026). A 'Renewal date' of 22/06/2027 is also listed.
- Members:** A table for 'Alverta Mueller' with details on 'Date of birth' (09/02/1994), 'Gender' (Female), 'Smoker' (No), 'Base plan' (Ultimate Health Max Base Cover - \$1000 Excess), 'Options' (—), and 'Member start date' (22/06/2026).
- Select subject:** Two buttons: 'Make Changes' (selected) and 'General Enquiry'.
- Select a member to edit their cover:** A dropdown menu showing 'Alverta Mueller' and 'Ultimate Health Max'.
- Excess (applies only to base cover):** A dropdown menu currently set to '\$2000'.
- Options:** A list of checkboxes for 'Specialist', 'GP' (checked), 'Dental, Optical, and Therapeutic', 'Proactive Health', 'non-PHARMAc Plus', and 'Serious Condition Financial Support'.
- Illustration Summary:** A table showing a monthly premium of '\$155.90' for 'Ultimate Health Max' with an excess of 2000. Other costs include GP (\$43.81) and Policy fee (\$7.70), totaling '\$155.90'.
- Important things to know:** A section titled 'Your illustration' explaining that the costs are estimated based on current rates and may change upon renewal.
- Adviser confirmation:** Two checkboxes: 'I, Adviser One, confirm that I have authority to act on behalf of the policy owner...' (checked) and 'By ticking this box you confirm you are aware this is not an official quote and pricing may change as this request is processed.' (checked).

At the bottom, there are 'Cancel' and 'Submit request' buttons.

Request a change of option(s) (with estimated premium)

Where supported, you can request option changes and view an estimated premium before submitting.

1. On the member record, select 'Request change' next to the relevant policy.
2. Select "Make changes".
3. Select/deselect the relevant option(s). The illustration summary updates to show an estimated premium.
4. Ensure you have the authority to act and informed consent from the member to request this change(s) and tick the authority confirmation checkbox to enable 'Submit request'.
5. Select 'Submit request' and confirm you see the success message.

The screenshot shows the 'Make a request' interface for a health policy. It includes sections for Policy details, Member information, and an 'Illustration Summary' table. The 'Options' section has checkboxes for Specialist, GP, Dental, Optical, and Therapeutic, Proactive Health, non-PHARMAC Plus, and Serious Condition Financial Support. The 'GP' option is selected. A success message at the bottom states 'Policy change request submitted successfully'.

Policy

Policy number	Billing frequency	Group Name	Policy start date
0069369	Monthly	-	22/06/2026
Renewal date	22/06/2027		

Members

Name	Date of birth	Gender	Smoker
Alverta Mueller	05/02/1994	Female	No
Base plan	Excess	Options	Member start date
Ultimate Health Max Base Cover - \$1,000 Excess	\$1,000	-	22/06/2026

Use this form to enquire or request a change for this policy

Select subject: **Make Changes** | General Enquiry

This form currently supports illustrations and requests for changes to excess and optional benefits for eligible health policies. If you need to make another type of change, please select General Enquiry. We will email you and the member a copy of any changes requested.

Select a member to edit their cover: **Alverta Mueller** (Ultimate Health Max Base Cover - \$1,000 Excess)

Cover for: **Alverta Mueller**

Ultimate Health Max
Excess (applies only to base cover): \$2000

Options

- Specialist
- GP
- Dental, Optical, and Therapeutic
- Proactive Health
- non-PHARMAC Plus
- Serious Condition Financial Support

Illustration Summary

Health policy	Monthly
Alverta Mueller	
Ultimate Health Max	\$104.19
Excess: 2000	
GP	\$43.81
Policy fee	\$7.70
Total	\$155.90

Important things to know:
Year illustration
This sets out estimated costs for the selected cover based on the policy owner's current payment method and our rates as of today. It includes GST and any policy fees. It is not a quote or offer. Cost may change, including as a result of the policy owner's policy renewal date or birthday. If a special offer applies to the policy owner's existing cover, these changes may impact those special terms and that is not reflected here. Any change to costs and terms will be confirmed after we've reviewed this request.

Adviser confirmation

I, Adviser One, confirm that I have authority to act on behalf of the policy owner(s). I have provided the policy owner(s) with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.

By ticking this box you confirm you are aware this is not an official quote and pricing may change as this request is processed.

Policy change request submitted successfully

We will notify you or the member if further information is required. We will also notify you or the member when these changes have been processed. Please note that some requests may require the member to go through underwriting. If you need to contact us, please reference the policy number.

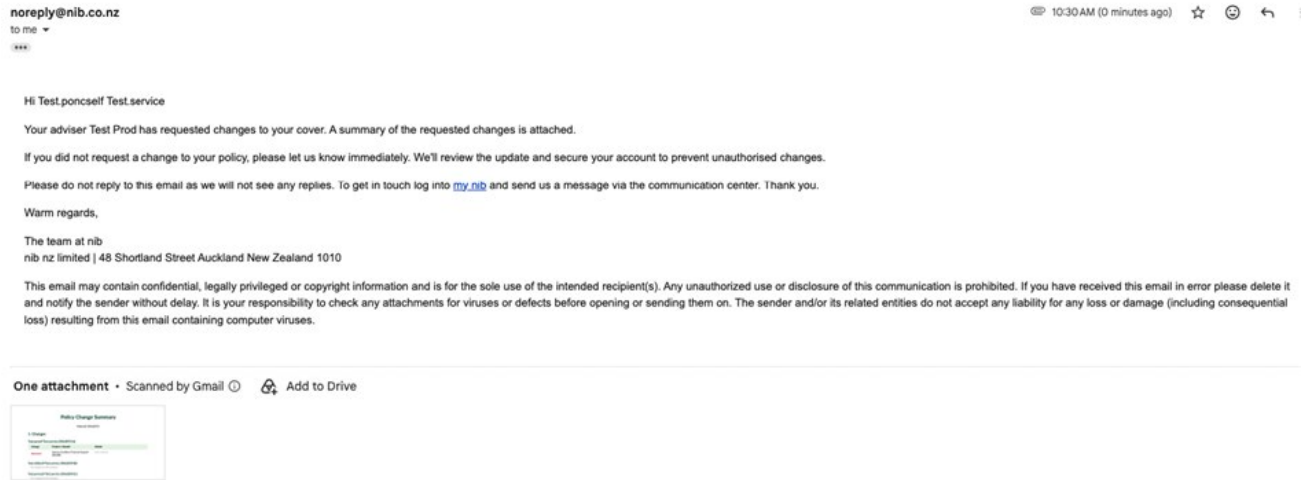
[Back to member details](#)

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What happens after you submit requested changes

Confirmation emails:

- When you submit a policy change request, a confirmation email is sent to the policy owner(s) where nib holds an email address, and you are also sent that email.
- When you submit a personal details request, a confirmation email is sent to the member, and you are also sent that email.



How we manage your requests

- Contact detail updates (phone and address) are processed automatically.
- Policy change requests are digitised and include an estimated premium illustration, but the underlying policy changes continue to be processed manually by nib.
- Personal details requests are reviewed and processed manually due to potential premium impact.

When a premium illustration is available

Illustrations are supported for:

- Change excess
- Change option

Insurance products supported (for illustrations):

- Ultimate Health (ULB)
- Ultimate Health Max (ULM)
- Easy Health (EH)

Illustrations are not currently supported for:

- Ultimate Health and Easy Health policies issued prior to April 2018
- Policies linked to a group (e.g., employer subsidised policies)
- Policies with commission dial back
- Policies that contain loading
- Policies that are in arrears

If an illustration is not supported, use the general request/enquiry option as a fallback.

Switch to v1 Adviser One

Members & Prospects Insights & Analytics
New Application

Make a request

Policy

Policy number 00616369	Billing frequency Monthly	Group Name -	Policy start date 22/06/2026
Renewal date 22/06/2027			

Members

Name Alverta Mueller	Date of birth 01/02/1994	Gender Female	Smoker No
Base plan Ultimate Health Max Base Cover - \$1,000 Excess	Excess \$1,000	Options -	Member start date 22/06/2026

Use this form to enquire or request a change for this policy

Select subject

Make Changes
General Enquiry

Enter details of the member's enquiry or the request below

Here is a general enquiry I would like to submit.

Adviser confirmation

I, Adviser One, confirm that I have authority to act on behalf of the policy owner/s. I have provided the policy owner/s with all necessary information and advice for them to make an informed decision to request this change(s) to their policy and they understand that this change may result in a change to their premium. They have provided their informed consent for me to request this change.

✔ **Policy change request submitted successfully**

We will be in touch if we require more information. If you need to contact us, please reference the policy number.

Back to member details

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Tips and common checks

- If you cannot submit a request, check that the authority confirmation checkbox is ticked (the submit button stays disabled until confirmed).
- After submitting, use 'Back to member details' (where available) to return to the member record.

Need help?

If you need a hand with the adviser portal, get in touch with your Adviser Partner Manager or email advisersupport@nib.co.nz.

For anything related to a submitted request, the Adviser Care team can help on **0800 238 642** or adviser@nib.co.nz.