



How To:

Submit a Claim Request or Claim Payment Request

Applies To Users with Claims Permission	Section Claims Dashboard	Last Updated 2026
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Overview

This guide covers how to submit two types of requests directly from the Pono 'Oe portal: a general Claim Request submitted from the Claims Dashboard, and a Payment Request submitted from within an individual payment record. Both request types are pre-populated with key claim information, so you only need to provide a description of your request.

 *Black boxes in screenshots are used to redact internal Group/Account identifiers and Personally Identifiable Information (PII).*

Before You Begin

Before starting, confirm that you have the access, context, and request details needed to complete the process.

- **Active account:** You must have an active Pono 'Oe account with Claims permission assigned by your Policy Administrator.
- **Claims access:** Your policy Administrator must grant you access to the Claims Dashboard after signing in to Pono 'Oe.
- **Request details:** Have a brief description of your request, since this is the only field, you need to complete.

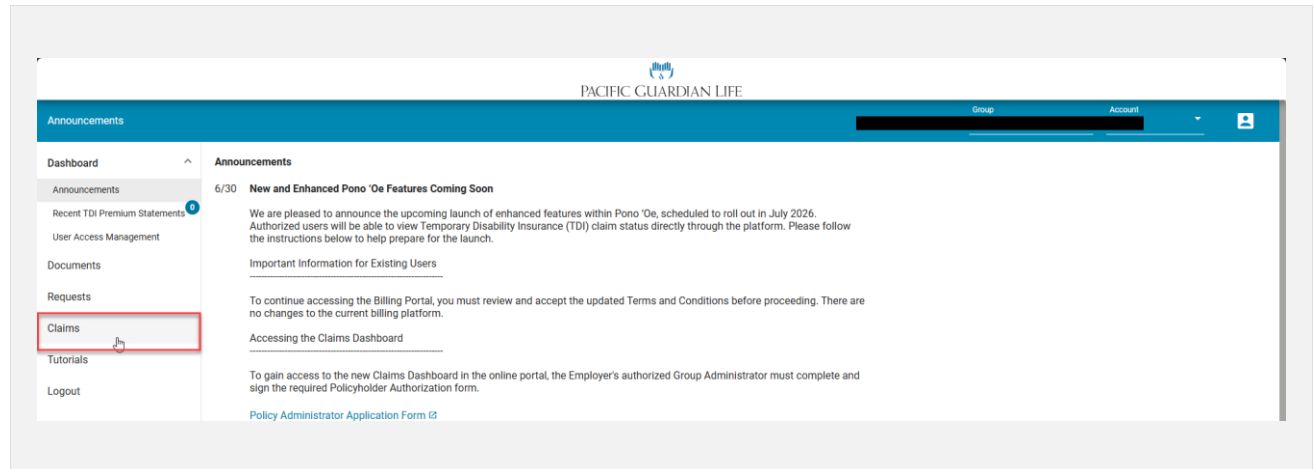
Workflow 1: Submitting a General Claim Request

Use this process when you have a question or request related to a specific claim. This is initiated directly from the Claims Dashboard.

1.1

Navigate to the Claims Dashboard

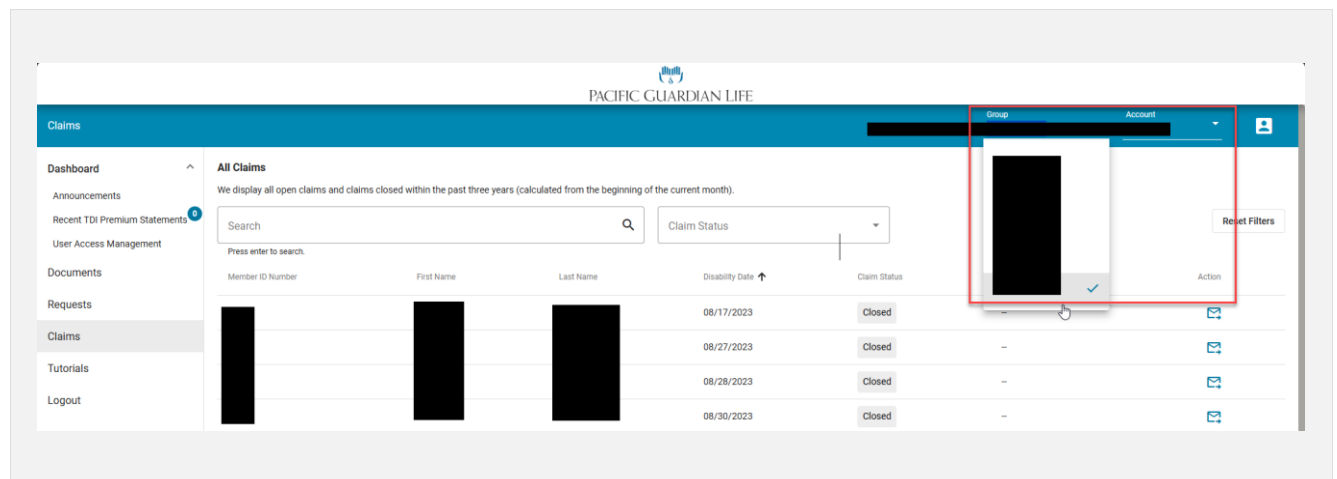
Log in to Pono 'Oe and click Claims in the left navigation bar to open the Claims Dashboard.



1.2

Locate the Claim Record

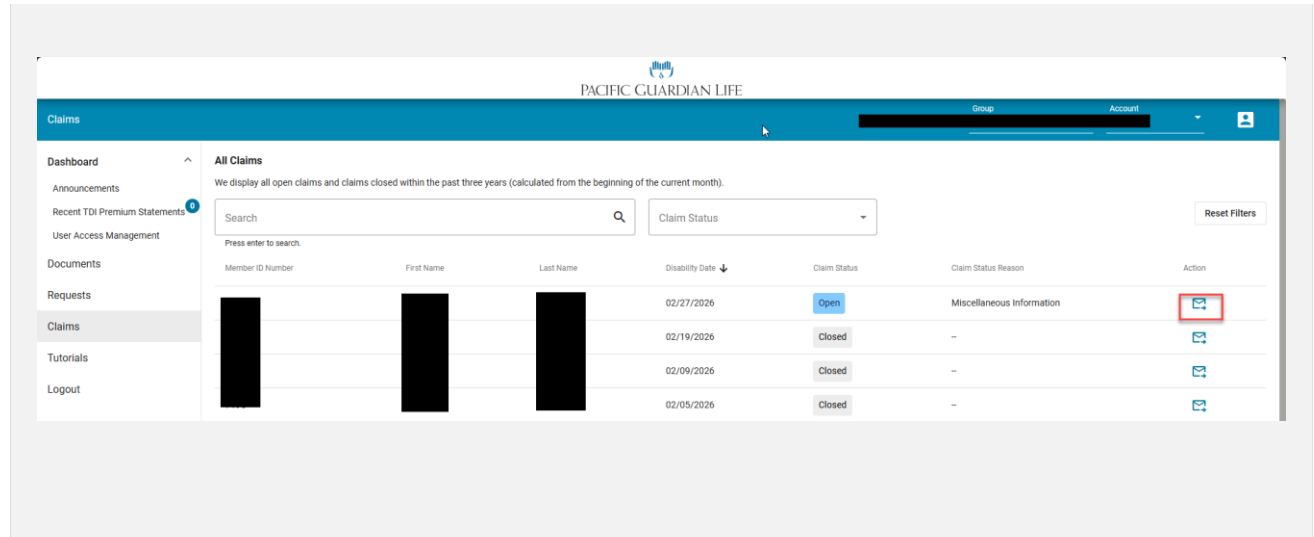
Find the claim you would like to submit a request for. Use the Group/Account filter in the top right corner if you need to switch between groups.



1.3

Click Submit Request

On the claim record, click the Submit Request button. The request form will open and automatically populate with the Member ID, Employee Name, and Date of Disability for that claim.



1.4

Enter a Description

In the Description field, enter the details of your request or question. This is the only field you are required to complete.

General Request

Claimant Information

Member ID Number	Employee Name	Disability Date
		02/27/2026

Request

Request Description*

Describe your request

This field is required.

Cancel

Create

1.5

Submit the Request

Click Create to send your request. A success message will appear on screen confirming your request has been received. You will also receive a confirmation email notifying you that your request was created successfully.

Your general request was created successfully. [Close](#)

Workflow 2: Submitting a Claim Payment Request

Use this process when you have a question or request related to a specific payment. This is initiated from within the payment breakdown of an individual claim.

2.1

Open a Claim Record

From the Claims Dashboard, click on the claim that contains the payment you wish to inquire about.

The screenshot displays the Pacific Guardian Life Claims Dashboard. The top navigation bar includes the company logo and name, along with user account information. A sidebar on the left lists various dashboard sections: Dashboard, Announcements, Recent TDI Premium Statements, User Access Management, Documents, Requests, Claims (selected), Tutorials, and Logout. The main content area is titled 'All Claims' and shows a table of claims. The first claim is highlighted with an 'Open' button. Below the table, the 'Claim Details' section is visible, showing 'Claimant Information' and 'Payment Information'.

Claims Table:

Member ID Number	First Name	Last Name	Disability Date	Claim Status	Claim Status Reason	Action
[REDACTED]	[REDACTED]	[REDACTED]	02/27/2026	Open	Miscellaneous Information	[Icon]
[REDACTED]	[REDACTED]	[REDACTED]	02/19/2026	Closed	-	[Icon]
[REDACTED]	[REDACTED]	[REDACTED]	02/09/2026	Closed	-	[Icon]
[REDACTED]	[REDACTED]	[REDACTED]	02/05/2026	Closed	-	[Icon]

Claim Details

Claimant Information

Member ID Number	Employee Name	Claim Status	Disability Date
[REDACTED]	[REDACTED]	Open	02/27/2026

Payment Information

Check or EFT Number	Payment Issue Date	Check Status	Service From Date	Service Thru Date	Net Benefit Amount
[REDACTED]	04/23/2026	Processed	03/06/2026	03/28/2026	\$2,573.98
Net Total amount paid:					\$2,573.98

Close

2.2

Click Into a Payment Record

Within the claim, locate the payment in the payment history list and click on it to open the benefit breakdown.

Claim Details

Claimant Information

Member ID Number	Employee Name	Claim Status	Disability Date
		Open	02/27/2026

Payment Information

Submit Request

Check or EFT Number	Payment Issue Date ↓	Check Status	Service From Date	Service Thru Date	Net Benefit Amount
	04/23/2026	Processed	03/06/2026	03/28/2026	\$2,573.98
Net Total amount paid:					\$2,573.98

Close

Payment Detail

Claim Details -

Payment Information

Check of EFT Number	Service From Date	Service Thru Date	Employer Contribution %
	03/06/2026	03/28/2026	100%

Payment Detail

Submit Request

Description	Amount
Gross Benefit Amount - Bi-Weekly	\$2,787.20
FICA Tax (-6.2%)	-\$172.80
Medicare Tax (-1.45%)	-\$40.42
Net	\$2,573.98

Close

2.3

Click Send a Request

On the payment breakdown page, click the Send a Request button. The form will automatically populate with the Member ID, Employee Name, Date of Disability, Check or EFT number, and the Service From and Through dates.

Payment Detail

Claim Details -

Payment Information

Check of EFT Number	Service From Date	Service Thru Date	Employer Contribution %
	03/06/2026	03/28/2026	100%

Payment Detail

Description	Amount
Gross Benefit Amount - Bi-Weekly	\$2,787.20
FICA Tax (-6.2%)	-\$172.80
Medicare Tax (-1.45%)	-\$40.42
Net	\$2,573.98

Submit Request

Close

2.4

Enter a Description

In the Description field, enter the details of your payment request or question. This is the only field you are required to complete.

General Request

Claimant Information

Member ID Number

Employee Name

Disability Date

02/27/2026

Payment Information

Check or EFT Number

Service From Date

Service Thru Date

03/06/2026

03/28/2026

Request

Request Description*

How was this payment sent?

27 / 500

Cancel

Create

TIP

Be as specific as possible in your description field. Including relevant details such as the payment amount, date, or the nature of your question will help the TDI Claims Team process your request more quickly.

2.5

Submit the Request

Click Submit to send your request. A success message will appear on screen confirming your request has been received. You will also receive a confirmation email notifying you that your request was created successfully.

Payment Detail

Claim Details -

Payment Information

Check of EFT Number

Service From Date

Service Thru Date

Employer Contribution %

03/06/2026

03/28/2026

100%

Payment Detail

Submit Request

Description	Amount
Gross Benefit Amount - Bi-Weekly	\$2,787.20
FICA Tax (-6.2%)	-\$172.80
Medicare Tax (-1.45%)	-\$40.42
Net	\$2,573.98

Close

01/17/2026

Closed

Items per page: 10

Your general request was created successfully.

Close

NOTE

After submitting a request, you will receive a confirmation email. Requests may take approximately 1–2 business days to process. Processing times may be extended during weekends, holidays, or periods of high request volume.

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Need Further Assistance?

If you have any questions, please contact us:

TDI Portal Team Email: TDIportal@pacificguardian.com	TDI Claims Team Email: TDIclaims@pacificguardian.com
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