PACIFIC GUARDIAN LIFE

How To:

View and Submit Requests & Inquiries

Applies To	Section	Last Updated
All Portal Users	Requests	2026

Overview

This guide walks you through the Requests screen in Pono ‘Oe. You will learn how to view and filter your submitted requests and inquiries, check the status and details of an individual request, and create a new request or inquiry directly from the Requests screen.

Before You Begin

Before you use the Requests screen, confirm that the following requirements are in place:

- **Active account:** You must have an active Pono ‘Oe account. If you do not have an account, contact your Policy Administrator.
- **Signed-in access:** You must be logged in to Pono ‘Oe before following the steps in this guide.
- **Required permissions:** Available request types depend on your assigned permissions. Contact your Policy Administrator if you need access to additional request types.

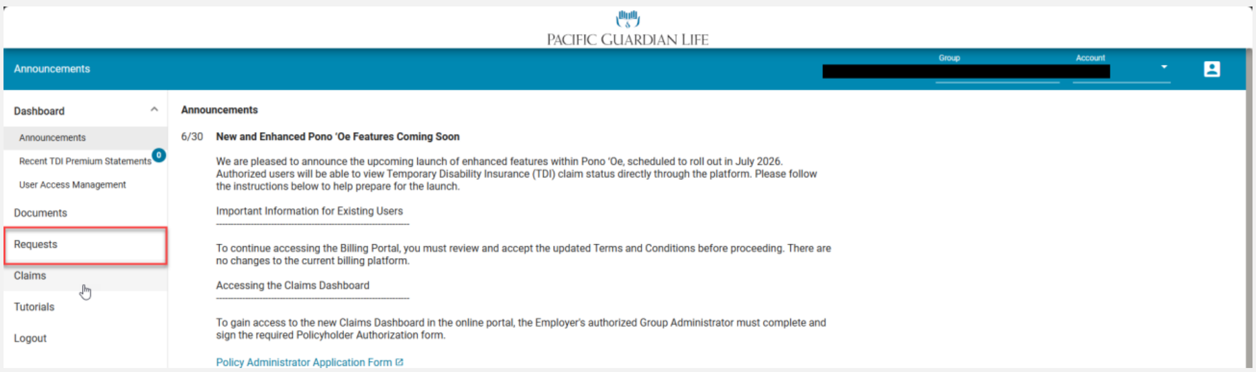
Workflow 1: Viewing Your Requests & Inquiries

The Requests screen gives you a complete view of all requests and inquiries you have submitted, filtered by the Group and Account currently selected in the top right corner.

1.1

Navigate to the Requests Screen

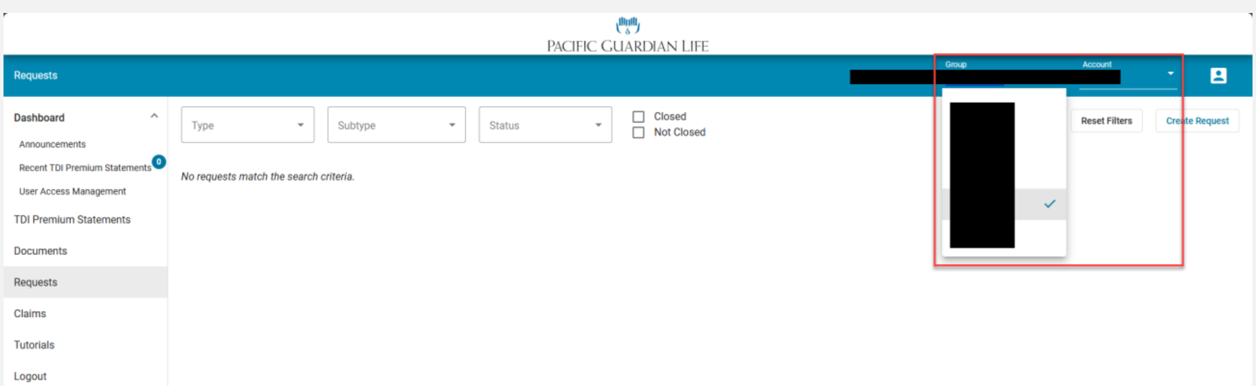
Log in to Pono ‘Oe and click Requests in the left navigation bar. The screen will display all submitted requests and inquiries for your currently selected Group and Account.



1.2

Switch Group or Account (If Needed)

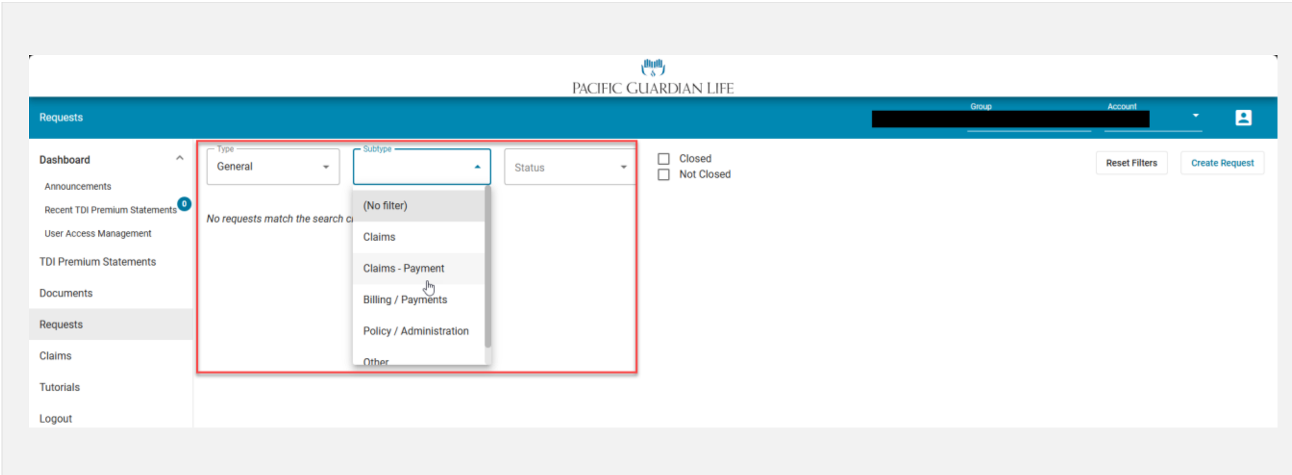
Use the Group/Account filter in the top right corner to switch between groups or accounts. The requests list will be updated to reflect the selected Group and Account.



1.3

Filter Your Requests (If Needed)

Use the available filters to narrow down your results. You can filter by Type, Subtype, and whether the request is Closed or Not Closed.



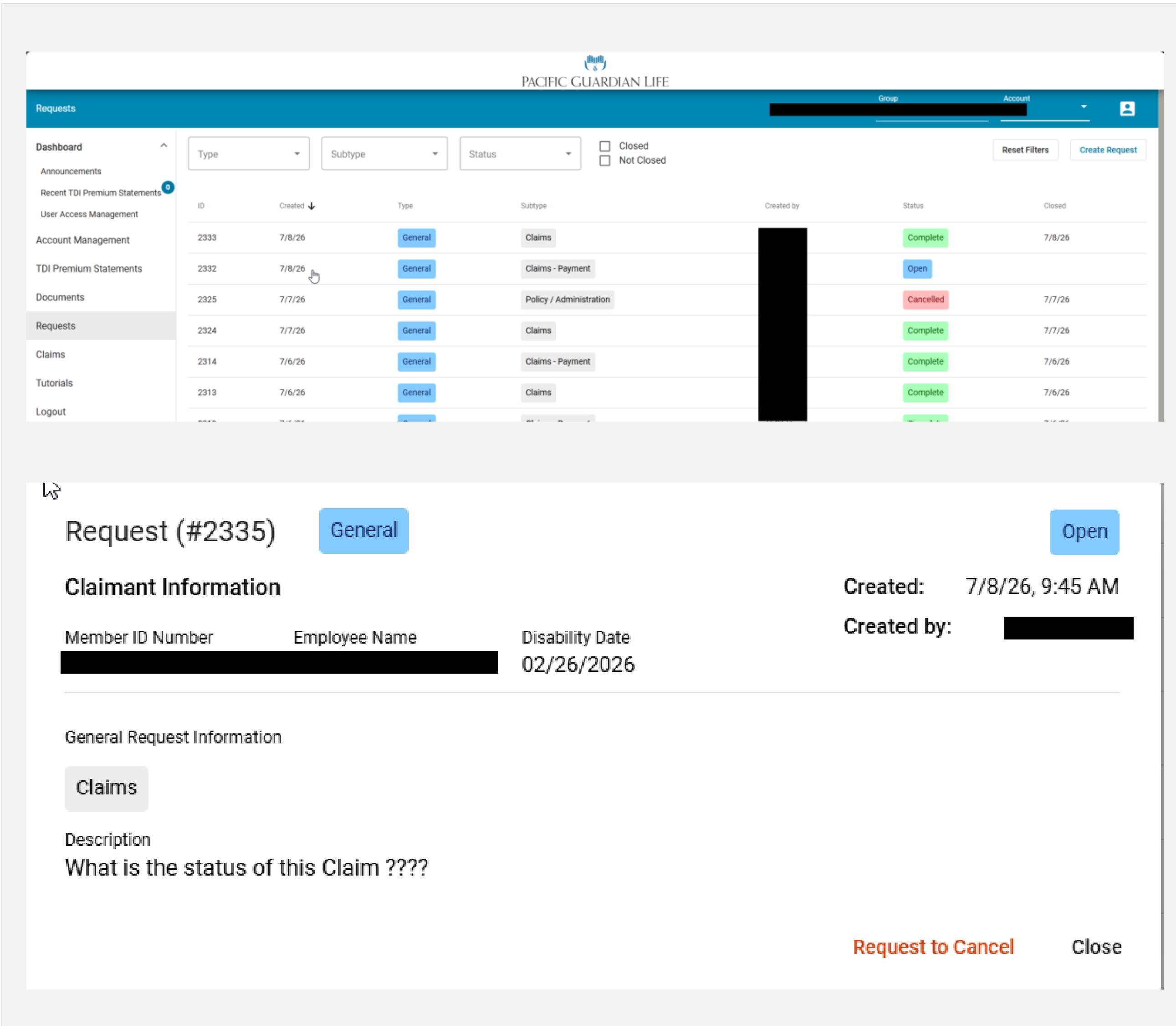
NOTE	Requests are visible for the last 3 years. A request can have the following statuses: Open, In Progress, Cancel Requested, Cancelled, or Completed. If you need to follow up on a request, please contact the TDI Portal Team with your request details.

Workflow 2: Viewing Request Details

Click into any request record to view its full details including its current status, submission information, and description.

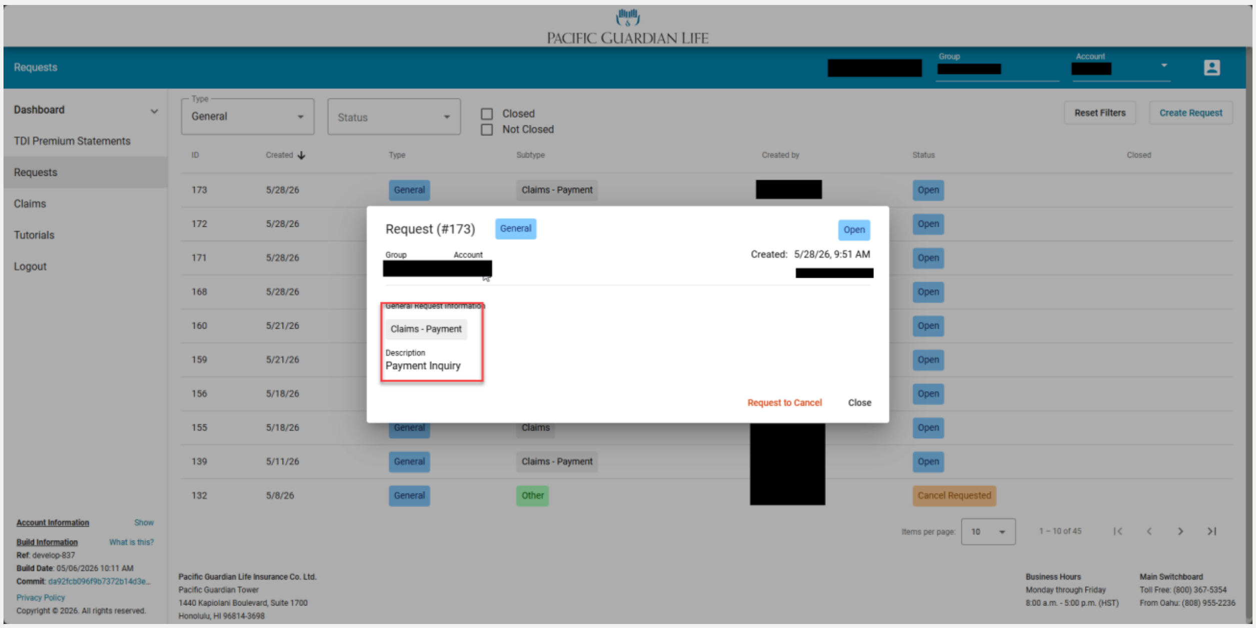
2.1 Click on a Request Record

From the Requests screen, click on any request to open its detail view.



2.2 Review the Request Details

The detailed view will display the following information for the request: Status, Group, Account, Date and Time Created, Submitted By, and the Description provided at the time of submission. Additional fields may appear depending on the request type.

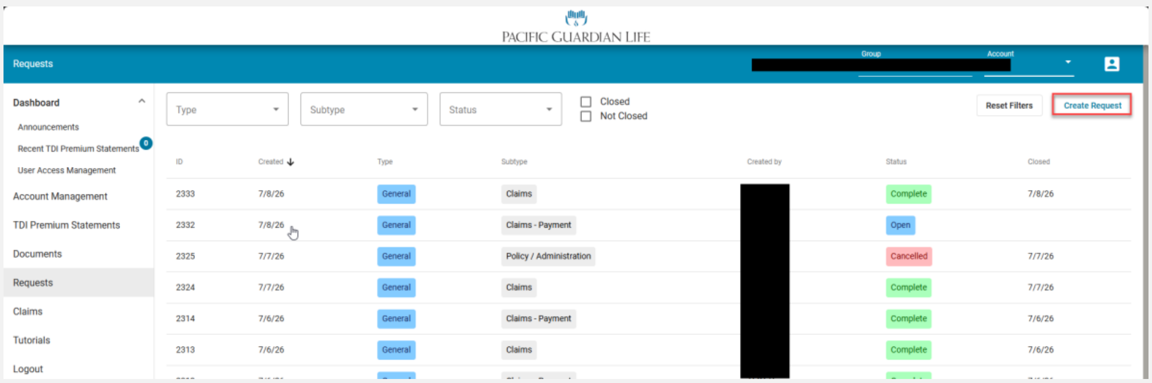


Workflow 3: Creating a New Request or Inquiry

You can also submit a new request or inquiry directly from the Requests screen without navigating to a specific claim or payment record.

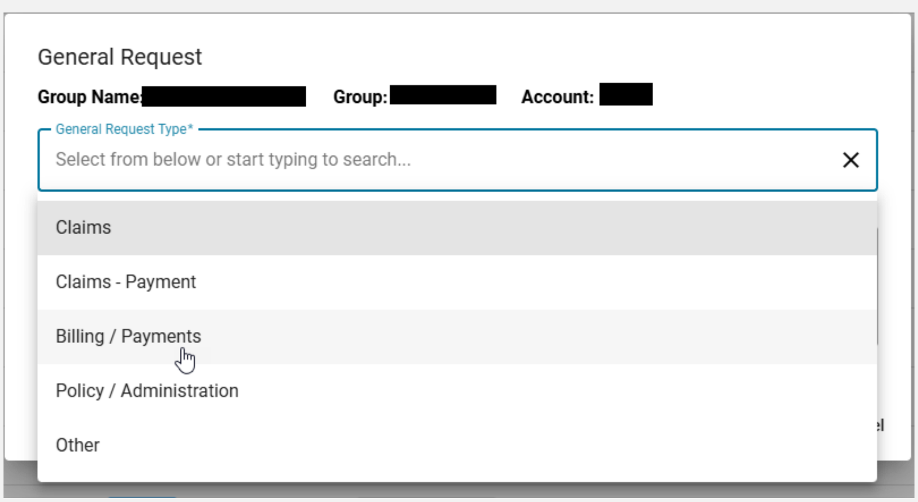
3.1 Click Create Request

On the Requests screen, click the Create Request button in the top right corner.



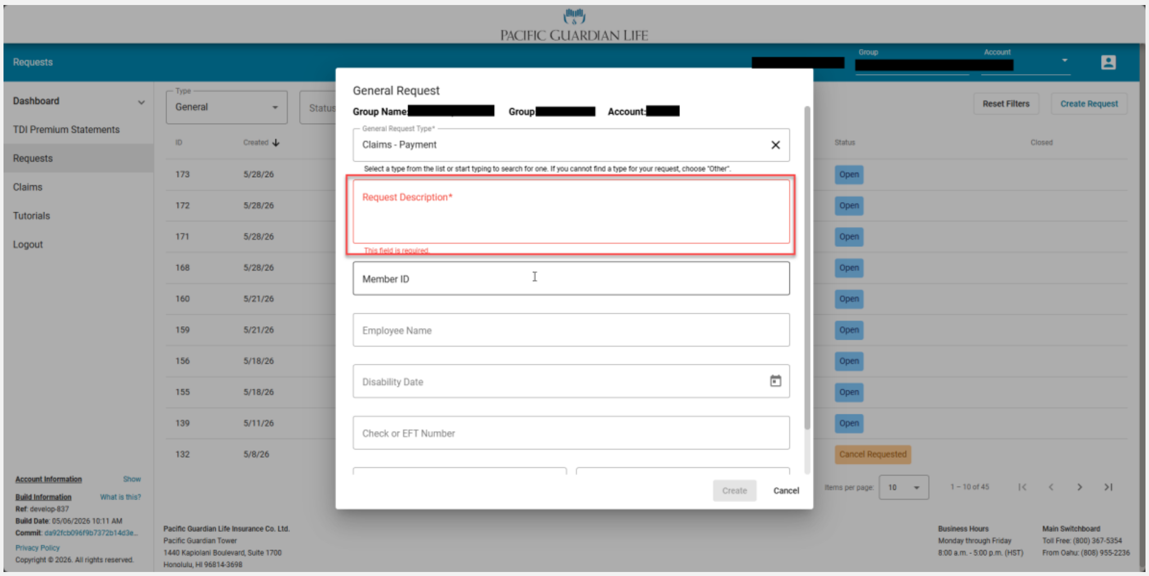
3.2 Select the Request Type

Choose the appropriate request type from the available options. Only the request types you have access to will be displayed, based on your assigned permissions (Claims, Billing, or Policy Administration).



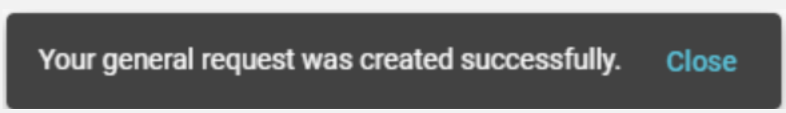
3.3 Enter a Description

Complete the Description field with the details of your request or inquiry. This is the only field you are required to fill in for all request types.



3.4 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.



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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**