

Registration Process for Bulk Re -Renewal Transfer Candidates

Corporate Agents must renew their candidates' licenses every **three years**. To qualify for renewal, each candidate is required to complete **25 hours of training**.

Steps to Follow:

1. **Excel File Preparation:** Format the file according to the required template, ensuring all candidate and payment type is accurate.
2. **Upload for Payment:** Upload the completed Excel file to initiate the payment process.
3. **Payment Processing:** Complete the transaction using the authorized payment method and save the confirmation receipt.

Step 1: Excel File Preparation

Before uploading to the portal, please ensure your Excel sheet is formatted exactly as follows to avoid system errors:

- **Header Format:** All column headings must be written in **CAPITAL LETTERS**.
- **File Format:** The file must be saved as a **Microsoft Excel 97–2003 Worksheet (.xls)**.
- **Sheet Name:** The tab at the bottom of the file must be named **Sheet1**.

PAN NUMBER	CERTIFICATION NUMBER	OLD CERTIFICATION NUMBER	EMAIL ID	MOBILE NUMBER

Step 2: Uploading the Excel File for Payment

IRDAI Examination – Corporate Agent – Renewal Online Training – Update Data Bulk Payment

The screenshot shows the official website of the Insurance Institute of India. The top navigation bar includes links for Home, About us, Examinations, Exam Registration, Useful Links, Tenders, and PG Courses. A dropdown menu for 'IRDAI Examinations' is open, showing options like POSP/Insurance Agents, Corporate Agent / IMF /Web Aggregator WA, and Corporate Agents. A large black arrow points from the text 'Corporate Agents' in the dropdown to the 'Corporate Agents' link in the main menu. Another black arrow points from the 'Corporate Agents' link in the main menu to the 'Upload Data Bulk Payment' link in the 'Renewal Online Training' dropdown menu. The main content area features a welcome message for the December 2025 examination results, along with logos for the Journal of Insurance Institute and the Institute of Actuaries of India, and details about RNI and ISSN numbers.

Registration Process for Bulk Re -Renewal Transfer Candidates

The screenshots illustrate the step-by-step selection process:

- Step 1:** Payment Type dropdown shows "payment for CA Re-Renewal Transfer Bulk Online Training".
- Step 2:** Select Type of Intermediary dropdown shows "Corporate Agent".
- Step 3:** Upload List dropdown shows "Details of Transfer Candidate".
- Step 4:** The "Choose File" button is highlighted with a red circle, indicating the next step.

Once the upload page opens, the screen shown below will appear. Click the "**Choose File**" button to select and upload your prepared Excel file.

Once the file is selected, the **file name** will appear on the screen to confirm your selection. Click the **Upload** button to proceed.

The screenshot shows the file "Transferup... ormat (1).xls" selected in the "Choose File" input field, with a red circle highlighting the file name.

Once the upload is complete, a confirmation message will be displayed on the screen as shown below:

The confirmation message on the screen is:

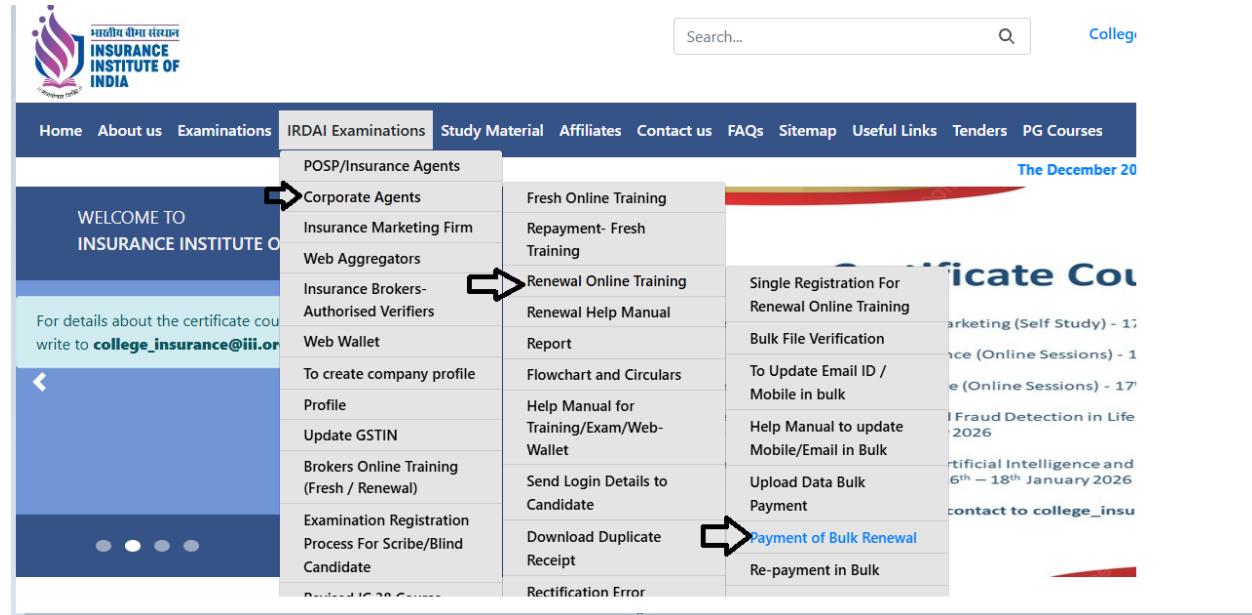
Total Records in File : 2
Records uploaded successfully : 2

Please go to the option "Renewal Bulk Payment" and select filter "Validate Transfer Candidate" and try to validate CA re-renewal transfer case data

Registration Process for Bulk Re -Renewal Transfer Candidates

Step 3: Payment Processing

IRDAI Examiantion –Corporate Agent – Renewal Online Training – Payment of Bulk Renewal



The December 20

WELCOME TO INSURANCE INSTITUTE OF INDIA

For details about the certificate course write to college_insurance@iii.or

Corporate Agents

- Fresh Online Training
- Repayment- Fresh Training
- Renewal Online Training
- Renewal Help Manual
- Report
- Flowchart and Circulars
- Help Manual for Training/Exam/Web-Wallet
- Send Login Details to Candidate
- Download Duplicate Receipt
- Rectification Error

Single Registration For Renewal Online Training

Bulk File Verification

To Update Email ID / Mobile in bulk

Help Manual to update Mobile/Email in Bulk

Upload Data Bulk Payment

Payment of Bulk Renewal

Re-payment in Bulk

Rectification Error

From the dropdown or menu, select the "Validate Transfer Candidate" option and click the **Search** button to retrieve the records.

Corporate Agents- Online Renewal Training

Date Type: From Date: To Date:

Status: Pan No: COR:

Insurance: Certification No of PO/SP/AV: Sort By:

or PAN Numbers by Uploaded file to Process for the Payment Between 2022-09-23 00:00:00.0and 2023-08-19 23:59:59.0

Not Eligible Now for Payment
Validate Transfer Candidates

Records will show on screen click on Validate Transfer data

Registration Process for Bulk Re -Renewal Transfer Candidates

Corporate Agents- Online Renewal Training

Date Type: * <input type="button" value="Uploaded date"/>	From Date: * <input type="text" value="23-09-2022"/> <input type="button" value=""/>	To Date: * <input type="text" value="19-08-2023"/> <input type="button" value=""/>					
Status: * <input type="button" value="Validate Transfer Candidates"/>	Pan No: <input type="text"/>	COR: * <input type="button" value="--ALL--"/>					
Insurance Category: * <input type="button" value="--ALL--"/>	Certification No of PO/SP/AV: <input type="text"/>	Sort By: * <input type="button" value="Uploaded Date"/>					
<input type="button" value="Search"/> <input type="button" value="Reset"/>							
Select All <input checked="" type="checkbox"/>	Sr. No	Certification Number of IRDAI	Old Certification Number of IRDAI	Pan No	Upload Type	Eligibility	Remark
<input checked="" type="checkbox"/>	1	[REDACTED]	[REDACTED]	[REDACTED]	Re-Renewal Transfer Payment		
<input checked="" type="checkbox"/>	2	[REDACTED]	[REDACTED]	[REDACTED]	Re-Renewal Transfer Payment		
<input type="button" value="Validate Transfer Data"/>							
Select Service Provider Name: * <input type="button" value="--Select--"/>							
<<<< First Page 1 >>> Last Page							

Registration Process for Bulk Re -Renewal Transfer Candidates

After validating records below details will show on the screen

Corporate Agents- Online Renewal Training

Date Type: * <input type="button" value="Uploaded date"/>	From Date: * <input type="text" value="23-09-2022"/> <input type="button"/>	To Date: * <input type="text" value="19-08-2023"/> <input type="button"/>																								
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Select Service Provider Name * <input type="button" value="-----Select-----"/>																										
<<< First Page 1 >>> Last Page																										

Select the "To do payment" option from the menu and click the **Search** button to view the records.

Corporate Agents- Online Renewal Training

Date Type: * <input type="button" value="Uploaded date"/>	From Date: * <input type="text" value="23-09-2022"/> <input type="button"/>	To Date: * <input type="text" value="19-08-2023"/> <input type="button"/>																								
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Select Service Provider Name * <input type="button" value="-----Select-----"/>																										
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Once the screen below appears, select the options as highlighted in the screenshot and click the **Go to Payment** button to proceed.

Corporate Agents- Online Renewal Training

Date Type: * <input type="button" value="Uploaded date"/>	From Date: * <input type="text" value="23-09-2022"/> <input type="button"/>	To Date: * <input type="text" value="19-08-2023"/> <input type="button"/>																																	
Status: * <input type="button" value="To Do Payment"/>	Pan No: <input type="text"/>	COR: * <input type="button" value="---ALL---"/>																																	
Insurance Category: * <input type="button" value="-----ALL-----"/>	Certification No of PO/SP/AV: <input type="text"/>	Sort By: * <input type="button" value="Uploaded Date"/>																																	
<input type="radio"/> To Update Data <input checked="" type="radio"/> To Make Payment																																			
<input type="button" value="Search"/> <input type="button" value="Reset"/>																																			
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Select All <input type="checkbox"/></th> <th>Sr. No.</th> <th>Candidate Name</th> <th>Pan No</th> <th>Validity Date</th> <th>Payment Status</th> <th>Insurance Category</th> <th>Certification Number of IRDAI</th> <th>Email Id</th> <th>Mobile No</th> <th>COR Type</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>1</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>17-10-2022</td> <td>To Do Payment</td> <td>Composite Insurance</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>Specified Person</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>2</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>17-10-2022</td> <td>To Do Payment</td> <td>Composite Insurance</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>[REDACTED]</td> <td>Specified Person</td> </tr> </tbody> </table>			Select All <input type="checkbox"/>	Sr. No.	Candidate Name	Pan No	Validity Date	Payment Status	Insurance Category	Certification Number of IRDAI	Email Id	Mobile No	COR Type	<input checked="" type="checkbox"/>	1	[REDACTED]	[REDACTED]	17-10-2022	To Do Payment	Composite Insurance	[REDACTED]	[REDACTED]	[REDACTED]	Specified Person	<input checked="" type="checkbox"/>	2	[REDACTED]	[REDACTED]	17-10-2022	To Do Payment	Composite Insurance	[REDACTED]	[REDACTED]	[REDACTED]	Specified Person
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Please select the mode of payment: <input checked="" type="radio"/> Online <input type="radio"/> Web Wallet Select Service Provider Name * <input type="button" value="-----Select-----"/>																																			
GSTIN State * <input type="button" value="-----Select-----"/> GSTIN No: <input type="text"/> Link to Add GSTIN																																			
<input type="button" value="Go To Payment"/>																																			
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Registration Process for Bulk Re -Renewal Transfer Candidates

The system will display a confirmation screen. Please review all details carefully to ensure accuracy, then click **yes** to authorize the payment.

Renewal Online Training of Corporate Agents - Payment Confirmation	
Date : 23/09/2022	Order No : 82851022
Company Name	[REDACTED]
Email	[REDACTED]
Mobile	[REDACTED]
GSTIN Number	[REDACTED]
GSTIN State	Rajasthan
Payment Details	
Reference Id	1508
No Of Candidates	2
Payment for Training	1000.0
IGST	180.0
Grand Total	1180
You can make payment using your Credit/Debit card as well Internet Banking.	
Payment Charges	
Mode of Payment	Charges applicable
Internet Banking	Rs.12 per Transaction
Debit Card (Visa / Master)	1.00% of Transaction Amount (Minimum Rs.12/-)
Credit Card	1.50% of Transaction amount (Minimum Rs.12/-)
Amex/Diners card	3.00% of Transaction amount (Minimum Rs.12/-)
Wallet / Prepaid Card	Rs.12 per Transaction
Minimum Charges	All Charges subject to a minimum of Rs. 12/- per transaction.
Mobile wallets / Cash cards	For PayTM wallet : 2.00% of Customer Payment Amount For all others: 1.75% of Customer Payment Amount
UPI / UPI QR	NIL
I have read and understood the Help Manual available on website. I agree that decision of I in all the matters will be final and binding upon me.	
Please Confirm	
<input type="button" value="Yes"/> <input type="button" value="No"/>	